



Department of Sociology

**Travel Writers, Tourist Writers, Migrant Writers:
A Sociological Qualitative and Quantitative Analysis of Factual
Literature on Contemporary Portugal and Spain**

A Thesis presented in partial fulfilment of the Requirements for the Degree of Doctor by

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Supervisor:
Professor António Firmino da Costa
ISCTE-IUL

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SUMMARY

Based on a corpus of 9 non-fiction works dealing with Portugal or Spain, a systematic analysis is performed of the representations those works convey, comparing them with views of the literature of social science on such countries. The texts' structural features associated with the production and presentation of such representations are also analysed. The departing point for both tasks is a definition of image of the social, along with the concept of commonsensical reader, as one of the goals is to consider the representations as they would appear to audience. Images are quantified in terms of their density, degree of generality, forms of knowledge and sources of knowledge. They are also quantified in terms of the themes they convey and the dualities traditional society/modern society and fundamental similarity/difference of otherness (quantification being considered necessary to avoid the problem of the implicit quantification found in the literature on travel writing produced by Humanities). Such data feed an individual and comparative analysis of each work, complemented by qualitative data. The emerging patterns – structural prejudice, types of authenticity, present(ific)ation of the past and aestheticization of the social – are related with a typology of writers (travellers, tourists and migrants) based on literature on tourism and travel writing, as well as on the material and epistemological circumstances of the authors' contact with otherness. Some of the associations – as well as their absence – underpin a discussion of possibilities of causation such as the origins of authors and highlight possible specific cultural functions performed by the factual literature on otherness.

KEYWORDS: NON-FICTION, TRAVEL WRITING, OTHERNESS, REPRESENTATION, AUTHENTICITY, TOURISM

RESUMO

Com base num corpus de nove obras de não-ficção sobre os países da Península Ibérica, é realizada uma análise sistemática das representações que essas obras transmitem, comparando-as com resultados da literatura das ciências sociais sobre esses países. As características estruturais dos textos associadas à produção e apresentação de tais representações também são consideradas. O ponto de partida para estas duas tarefas é uma definição de imagem do social, juntamente com o conceito de leitor de senso comum, visto que um dos objetivos é considerar representações tal como surgem ao público. As imagens são quantificados em termos da sua densidade, grau de generalidade, formas de conhecimento e fontes de conhecimento, bem como quanto aos temas que consubstanciam e às dualidades sociedade tradicional / sociedade moderna e diferença / semelhança fundamental da alteridade (sendo a quantificação considerada necessária para evitar o problema da quantificação implícita identificado nos estudos sobre literatura de viagens produzidos pelas Humanidades). Tais dados alimentam uma análise individual e comparativa de cada obra, complementada por dados qualitativos. Os padrões identificados – preconceito estrutural, tipos de autenticidade, apresent(ific)ação do passado e esteticização do social – são relacionados com uma tipologia de escritores (viajantes, turistas e emigrantes) elaborada com base nos estudos sobre literatura de viagens e turismo, bem como atendendo às circunstâncias materiais e epistemológicas do contacto dos autores com a alteridade. Algumas das associações – assim como a respetiva ausência – servem de base a uma discussão de possibilidades de causalidade (por exemplo, com base nas origens dos autores) e destacam possíveis funções culturais específicas desempenhadas pela literatura factual sobre a alteridade.

PALAVRAS-CHAVE: LITERATURA NÃO FICCIONAL, LITERATURA DE VIAGENS, ALTERIDADE, REPRESENTAÇÃO, AUTENTICIDADE, TURISMO

Table of Contents

| | |
|---|-----|
| Chapter 1 – Introduction and objectives | 9 |
| 1.1 – Summary | 9 |
| 1.2 – Definitions of travel writing..... | 9 |
| 1.3 – “Travel writing” without travelling: the factual literature on otherness | 11 |
| 1.4 – The social relevance of the factual literature on otherness and reasons for studying it | 14 |
| 1.5 – The reader and the researcher: external analysis versus internal analysis | 18 |
| 1.6 – The selection of the corpus: exclusive focus on the texts and the specificities of Southern Europe identified by social science | 21 |
| 1.7 – Presentation of the corpus | 30 |
| Chapter 2 – Literature review..... | 34 |
| 2.1 – Summary | 34 |
| 2.2 – Introduction | 35 |
| 2.3 – The quest for “authenticity” and (“)tradition(“)..... | 38 |
| 2.4 – Traditional society, modern society and proposed subsequent stages | 46 |
| 2.5 – Humanism and cultural relativism | 63 |
| 2.6 – Types of movement and gaze in(to) otherness: motivations and symptoms..... | 68 |
| 2.7 – The approach of sociology of literature to the factual literature on otherness | 91 |
| 2.8 – The factual literature on otherness and ethnographies as studied by ethnographers and other critics | 95 |
| Chapter 3 – Methodology..... | 110 |
| 3.1 – Summary | 110 |
| 3.2 – A quantitative perspective on FLO vis-à-vis other types of academic analysis..... | 110 |
| 3.3 – Images of the social world | 112 |
| 3.4 – Principles and rules for identifying and quantifying the images of the social world | 114 |
| 3.5 – Degrees of generality and density | 118 |
| 3.6 – Forms of knowledge of the social world..... | 120 |
| 3.7 – Epistemological empathy towards otherness | 123 |
| 3.8 – Sources of knowledge of the social world | 127 |
| 3.9 – Composite indicators for forms and for sources of knowledge | 129 |
| 3.10 – The themes of the images of the social world..... | 130 |
| 3.11 – Images of traditional society and modern society | 143 |

| | |
|---|-----|
| 3.12 – Essential differences or similarities of otherness and relations with humanism and cultural relativism..... | 145 |
| 3.13 – The statistical significance of comparisons between authors..... | 145 |
| Chapter 4 – Analysis of individual works..... | 146 |
| 4.1 – Introduction..... | 146 |
| 4.2 – The circumstances of the contact with otherness..... | 146 |
| 4.3 – House refurbishing, cultural refurbishing: the exotification of (<i>A Cottage in</i>) <i>Portugal</i> | 156 |
| 4.4 – Tourist writer Julio Llamazares: modernity in the countryside and disregard for knowledge in the footsteps of Camilo Jose Cela..... | 163 |
| 4.5 – The travels of Paul Hyland and Datus Proper in eternal Portugal..... | 169 |
| 4.6 – Chris Stewart(s') <i>Driving Over Lemons</i> down to earth..... | 174 |
| 4.7 – A bike epistemologically light: Polly Evans's physical effort..... | 175 |
| 4.8 – Miranda France's research in Spain and La Mancha..... | 178 |
| 4.9 – Frank Arencibia's negative <i>Spain</i> , or the work(ings) of prejudice..... | 181 |
| 4.10 – “Don't call me Sir”: Camilo Jose Cela and the subversion of the horizons of expectation of travel writing..... | 186 |
| Chapter 5 – General analysis and interpretations..... | 202 |
| 5.1 – The representations of the Iberian neighbours..... | 202 |
| 5.2 – Circumstances of contact with otherness, types of visitors and possibilities of causation..... | 208 |
| 5.3 – Varied constructions of the other and the search for authenticity in practice..... | 212 |
| 5.4 – The present(ific)ation of the past, or time distorted by space..... | 220 |
| 5.5 – The aestheticization of the social and specific functions of factual literature on otherness..... | 224 |
| 5.6 – A stance on authenticity..... | 229 |
| 5.7 – Actual and recommended modes of relation to otherness..... | 232 |
| Chapter 6 – Conclusion..... | 238 |
| Bibliography..... | 249 |
| Annex A – The implicit quantification of literary studies on TW and FLO..... | 273 |
| Annex B – Description of statistical results..... | 275 |
| B.1 – Absolute quantity and density of images of the social world..... | 275 |
| B.2 – Degrees of generality..... | 277 |
| B.3 – Density of extension of knowledge of the social..... | 278 |

| | |
|--|-----|
| B.4 – Forms of knowledge of the social world | 279 |
| B.5 –Epistemological empathy towards otherness..... | 285 |
| B.6 – Sources of knowledge..... | 289 |
| B.7 – The themes of the images of the social world | 296 |
| B.8 – Focused analysis (excluding authors focused on specific subsets of otherness)..... | 313 |
| B.9 – The negativeness of the social worlds of Iberia | 320 |
| B.10 – Images of tradition and modernity..... | 329 |
| B.11 – The difference or similarity of otherness..... | 337 |
| B.12 – Correlations between some variables | 343 |
| Annex C – Max Weber and the distinction between understanding and explanation..... | 356 |

Chapter 1 – Introduction and objectives

1.1 – Summary

This chapter begins by discussing definitions of travel writing and the factual literature on otherness (this being wider than travel writing by not necessarily involving travel as a major element and by including books on the countries of origin of authors), based on which the social relevance of the genres is established as grounds for justifying its study. The objectives of the study are established considering the important distinction between the perspectives of the reader and the researcher, which will underlie several analyses henceforth. The selection process of the corpus to be studied is presented, including a justification for an exclusive focus on texts (rather than on external biographical information regarding authors), and an argument stemming from the specificities of Southern Europe as identified by social science.

1.2 – Definitions of travel writing

“Travel writing” (henceforth TW) has been defined in many ways mostly by Literary Studies / Humanities scholars who, as it is seen in the literature review chapter, are overwhelming in the study of the subject (Kohl, 1990; Kaplan, 1996; Korte, 2000; Campbell, 2002; Champeau, 2004; Robinson, 2004; Youngs and Hopper, 2004; Borm, 2004; Tavares, 2004; Lisle, 2006). Champeau (2004:30)¹ distinguishes travel books (*libros de viajes*) or travelogues (*relatos de viajes*), on one side (page 30) as a special category of travel literature (*literatura de viajes*): the former are characterized by the **pact of factual reading** (*pacto de lectura factual*, page 30) while travel literature is deemed a border genre as regards several dimensions (amongst them fact versus fiction, a crucial criterion for the definition of the genre TW and the consideration of its social effects, as is seen below).

Similarly, according to Borm (2004:13), French critics (note the term which points to the area of Literature Studies / Humanities) usually differentiate *récits de voyage* from *littérature de voyage*, a distinction also found in German language and which he deems corresponding in

¹ Based at the University Michel de Montaigne -Bordeaux 3 but presenting here a text in Spanish.

English to the distinction between *travel book* or *travelogue*², a genre predominantly (and supposedly) non-fictional, on one side and, on the other, *travel writing*, *travel literature* or *literature of travel*, as an overall label for works having travel as theme. For him, TW “it is not a genre, but a collective term for a variety of texts both predominantly fictional and non-fictional whose main theme is travel (2004:13)”.³

Such inclusion of fiction in the definition of TW seems, however, at odds with the implicit use of the term *travel or travel writing* in bookshops and libraries, where travel sections usually include only non-fictional travel literature (plus practical guidebooks). Their shelves rarely display fictional works involving travel – not the least because these are rare comparing to the production of works presenting themselves as truthful accounts of a journey.⁴ In academia the non-fictionality of TW is also important for the flourishing area of post-colonial studies (mainly carried out within Literature Studies / Humanities, as seen in the literature review chapter). Post-colonial scholars usually focus on the narrator-traveller in terms of relations of power with “travellees” (to use Pratt's term, 1992:133) – both epistemologically and socially – and such relations would be less relevant if they were, say, found in a novel.

When referring to the TW of magazine *Granta*, Sugnet (1991:70-85) holds that “the magazine's overall coverage, with its emphasis on disaster and bizarre behaviour, is probably even worse than mass media coverage of Africa”, thus implicitly affirming the truthfulness with which the genre is received. Further, by using the term *travel book* (which at face value includes all books about travel) as interchangeable with *travelogue* (which denotes a clear non-fictional dimension), Borm (2004) seems to highlight the importance of such dimension; similarly, Lisle (2006) and Korte (2000) use *travel book* and *travelogue* without distinction in meaning (Robinson, 2004).

Therefore, TW is deemed in this study a work presented / received as a factual, honest, first-hand account of a travel experience, a definition which is generally sustained by Tavares

² Dann (1999:162) (quoted in Lew *et al*, 2004) actually distinguishes “travelogues” (epitomized by the Sunday newspaper supplements) from travel books, while Stowe (1994: no page provided, also quoted in Lew *et al*, 2004) sees “travel chronicles” as something also different from travel books. The differences seem, however, to be merely related to text size.

³ Lisle (2006:1) also talks of the “quasi-fictional genre of travel writing” but holds that “the non-fiction status of travelogues allows them to employ strategies and methodologies similar to those used in the natural and social sciences.”

⁴ The works of Bruce Chatwin, who insisted they should not be called non-fiction, might be the exception to this. As is seen below in section 4.10, Camilo Jose Cela's *Nuevo Viaje a la Alcarria*, one of the works under study here, plays with the distinction.

(2004), Champeau (2004), Gannier (2001), Borm (2004), Youngs and Hopper (2004) and Kaplan (1996). Todorov and Berrong's (1990:18) argues that “it is because genres exist as an institution that they function as **‘horizons of expectation’** for readers and as ‘models of writing’ for authors”. This can be seen in the specific genre of TW as the fact that “travel writers claim – and their readers believe – that the journey recorded actually took place, and that is presented by the traveller him or herself” (Korte, 2000:1). The **“truth-effect”** of TW – “a very strong influence on readers who learn to expect that the traveller’s experience can only render the text more truthful” (Kaplan, 1996:54) – has led Aldridge (1995:415–434) to raise doubts about the authenticity of Peter Mayle's best-selling accounts of his life in Provence (related both to his use of free indirect discourse and other literary devices in order to convey “ethnographic colour”).

1.3 – “Travel writing” without travelling: the factual literature on otherness

It seems obvious that travel is an essential part of TW, as it is included in its very designation. Still, a significant part of the texts thus classified is marked by the somehow paradoxical characteristic that they do not involve explicitly an ongoing journey, although the journey may be implicit as an initial, non-described displacement into distant lands or cultures⁵. While “travel generally entails going into another culture” (Siegel, 2002a:2), the genre is not always “in large measure [...] the record of what one sees on that journey”, as many works analysed in academia as TW and kept under such name in the shelves of the book industry are limited to the account of a sojourn. Cases in point are the above-mentioned Peter Mayle's books, of which *A year in Provence* was considered the Best Travel Book of the Year 1989 by the British Book Awards (Holland and Huggan, 1998) and achieved the status of TW best-seller (see next section). Also, William Dalrymple’s *City of Djinnns*, (1994) the winner of the 1994 Thomas Cook Travel Book Award (last awarded in 2004) is both the account of the author’s experience in the capital city of India while researching historical information and a presentation of the results of such efforts, no travel outside Deli being mentioned.

⁵ This is not to say that displacement, either explicit (account of a journey) of implicit (no journey accounted but the travel writer is far from home / far from the reader's home) is not part of the seduction of works that write about social realities. According to Lew *et al* (2004:311) “the disjuncture between 'being' home and 'being' away provides travel writing with its ultimate force and energy. It is the force we encounter when we experience the unfamiliar or, often, the familiar in other locations. The more elaborate the journey and the more exotic or removed the destination, the greater the sense of revelation and adventure for the reader.”

In order to consider such absence of ongoing displacement, what is usually subsumed under “travel writing” would be better conveyed as “factual literature on otherness” (henceforth FLO), which thus would encompass TW in its specific meaning – that is, as a subgenre of FLO in which there is ongoing displacement⁶. Otherness must then be taken in a broad sense to mean the result of an act of distancing towards the society/culture which is experienced (either one's own or another) which renders the other as object and has the important consequence that such society/culture needs not to be foreign.

This is probably what Atkinson's (1990:157) has in mind when, in the context of the ethnographic work, he holds that 'strangeness' can be achieved through an “imaginative bracketing of the familiar and the mundane” (and, according to him, also be imposed on the observer through “an encounter with the exotic”). This, of course does not make the work of the travel writer or the factual writer on otherness of the same nature as that of ethnographic work (and, more generally, of social science work). Science is different from other human activities that produce knowledge or information at least in its mechanisms of peer review and collective, public examination of production processes (Bourdieu, 2001:108). This is something which Carrithers (1988:22)⁷ seems to ignore when he claims it is difficult to see anthropology “achieving more than might good TW if it is not grounded in some thought about what is generally true about humans”.

On another, related dimension, while FLO usually resorts to the past tense, the classical realist ethnography is timeless: “change is absent; the account is in the present tense” (Wheeler, 1986:52-63). This can be seen as associated with the fact that (and with social science in general) ethnography aims at showing/explaining social/cultural structures, which can be considered as not changing significantly during the one year (or two, as per Sardan, 1995:74) commonly prescribed as observation period leading to the production of the classical monograph within the genre. Such period is usually much longer than for the non-ethnographic writer on otherness, which sometimes is almost infinitesimal, a dot in the line of the ongoing journey (e.g. Paul Theroux's *The Great Railway Bazar*, 1975). Further, in realist ethnography the first-person

⁶ The world literature here excludes broader senses as in “scientific literature”, “tourism literature”, etc. in which the collective production of works may be important, focusing rather on the idea of a single, subjective author, as in travel writing.

⁷ Quoted in Ingold (1996). “Literature on reality” would be another possible designation, but the absence of “otherness” would not account for the distantiation involved in taking other cultures or one's own as an object of observation or enquiry, as developed below.

narrator is absent from the text, which is dominated by a scientific, dispassionate, third-person narrator, according to Wheeler (1986:52-63)⁸, who identifies still another difference:

the traveller expresses judgments about phenomena that violate the values of traveller and audience and thus entertain, stimulate, and by contrast reaffirm those values. (...) Ethnographers (...) embrace the task of dissolving anomaly into the moral ecology of the society studied”⁹

Common to these two attitudes, the above-mentioned bracketing of the familiar and the mundane does not need necessarily to arise out of the will of the observer because strangeness can be imposed on her/his, as Atkinson (1990:157) reminds: for example, in great cities the anthropologist might experience estrangement as if s/he were in “exotic societies” (Velho, 1978:40).

Further, as Korte (2000:5) remembers, “the traveller's own country may equally be the object of [the travel writer's] own investigation”. For example, in nineteenth century a literary convention developed associating the inhabitants of working class neighbourhoods (specially the London East End) to primitive tribes (Nord, 1987)¹⁰. Non-fiction works such as *Native Land*, by Nigel Barley (1989) and *The return of a Native Reporter*, by Robert Chesshyre (1987) follow a strategy of de-familiarization of their own country (Matos, 1999). Some of Bill Bryson's books – *The Lost Continent: Travels in Small-Town America* (1989); *Notes from a Small Island* (1995); *Notes from a Big Country* (UK title, 1999) / *I'm a Stranger Here Myself* (US title)) – also deal with his own cultural and social worlds (Bryson was born in the US but lived in Britain most of his adult life before returning to his place of birth in 1995), a proximity also applying to potential readers judging by the titles.¹¹

Considering this and based on the above established definition of TW, **FLO is thus defined as a work presented / taken as a factual, honest, first-hand account of experiences of otherness.**¹²

⁸ These differences do not imply that the factual literature on otherness and the scientific production cannot be both studied as texts in their argumentative endeavours, as is the case with Edmondson (1984) and others, as detailed in section “Travel(ling) outside social science” of the literature review chapter.

⁹ The issue of cultural relativism versus humanism is developed below, in the literature review chapter.

¹⁰ Quoted in Matos (1999).

¹¹ In Argentina there is also a long tradition of local books self-analysing the country and its people, which is visible in bookshops.

¹² In the sense just defined, otherness is ultimately a relational concept which depends on what surrounds the observer and on how far her / his gaze sees. As Velho (1978:148) argues, two individuals belonging to the same

1.4 – The social relevance of the factual literature on otherness and reasons for studying it

By the turn of the millennium, the English-speaking world TW had been “booming, with good sales figures and a few best-sellers” (Korte, 2000:2). According to Russell (2000), there has been in recent years a revival of the genre, as seen in new travel series by major publishing houses, numerous travel literature anthologies, best-sellers and prominent displays in bookstores¹³ – and the phenomenon is not limited to the English-speaking world.¹⁴

Although the diffusion and acceptance by readers of TW and, more generally, FLO may vary from country to country, one can use **Thomas theorem**¹⁵ (Thomas and Thomas, 1928) to suppose they produce effects in at least two dimensions: 1) nationalism(s) / representations of groups of people and (social) representations of geographical entities such as countries; and 2) tourist demand (in part consequence of or intermingled with 1)). Specifically, the perspective that identities (at national level or other levels) are socially constructed is largely taken for granted in social science (Costa, 2002:26).

Amongst the so-called mythologist view of nationalism, social constructivists consider (Clancy, 2008:5)¹⁶ that, given nations are made, not given, and their making is produced by ideas, national identity does not necessarily have much in common with actual history, which is

society are not necessarily closer than if they belonged to different societies and were connected by preferences, tastes and idiosyncrasies.

¹³ According to Kowalewski (1992), quoted in Russell (2000), William Least Heat-Moons's (1982) *Blue Highways*, for example, has sold more than 1.25 million copies since it appeared in 1982. “Paul Theroux, Bruce Chatwin, Frances Mayes, Bill Bryson and Peter Mayle have also had great successes with their travel books; they are reviewed regularly in the *New York Times* and daily newspapers everywhere, and have seduced a large segment of the Anglo-American reading public” (Russell, 2000:1). Further, Peter Mayle's (1989) *A year in Provence* had sold by the end of the 1990's over a million copies and was translated into seventeen languages and even converted into a British TV serial (Holland and Huggan, 1998). It was included in the British paperback best-seller list for 60 weeks and together with the sequel *Toujours Provence* (Mayle, 1991) had sold up to the mid-nineties around four million copies worldwide (Aldridge, 1995, quoted in Sharp (1999)). Travel writer Paul Theroux's (1975) *The Great Railway Bazaar* reached five million copies in sales in 20 languages (Dalrymple, 2008) while in the U.S. market the works of travel (and non-fiction) writer Bill Bryson surpassed the figure of six million copies (Kaufman, 2010).

¹⁴ Hape Kerkeling's (2009) *Ich bin dann mal weg* (translated in English as *I'm Off Then: Losing and Finding Myself on the Camino de Santiago*) has sold more than three million copies in Germany and has been translated into eleven languages;). Similarly, albeit on a more modest scale concordant with the dimension of the Portuguese market, Portuguese travel writer Gonçalo Cadilhe shows up frequently on bookshops bestseller lists in the country and his success has prompted a television programme based on one of his books he himself presents.

¹⁵ “If men define situations as real, they are real in their consequences”.

¹⁶ He also identifies the primordialist (nations are people and their ties to the land) and modernist views (nationalism as historically distinct response to modern technological change, industrialization, the move away from agrarian society and the need for mobile labour) (:3).

frequently invented.¹⁷ Poole (1999)¹⁸ holds that national identity reaches people through literature, music, language, history and other cultural resources; Corse (1997)¹⁹ argues that reading canonical novels helps to construct national identities and feelings of solidarity among disparate readers; while Griswold (1992)²⁰ found that the “village novel” establishes “a powerful yet historically suspect sense of Nigerian identity”.

Once the size of a community makes personal acquaintance among its members impossible, the community must to some degree be imagined (Anderson, 1983); therefore, if “[social theory] has real consequences, because individuals cannot do without some kind of conception of the type of society in which [they] live”, as Block (1990:2)²¹ holds, one can expect that FLO plays an important role in the construction of such type of community. If texts received as fiction produce such effects, one may *a fortiori* expect works received as factual to take a part in the formation of ideas of nations and, more broadly, of cultures or models of societies, especially when contact with the difference or the other is involved.

Indeed, the literature of travel has been much relevant in the construction of the “other” or “exotic” worlds by Europeans (Korte, 2000) and takes part on the formation of national identity (Bell, 1995). As Said (1978:3) remembers “no identity can ever exist by itself and without an array of opposites, negatives, oppositions”, and “any conception of and claim to community can entail a sense of belonging, a set of shared values, cultural or biological traits and, perhaps fundamentally, the perception of difference from others” (Evans and Boswell, 1999:11). Said (1978) himself has shown the importance of the written accounts of (contacts with) peoples of the “Orient” in the eighteenth- and nineteenth-centuries authored by Western individuals in shaping the view of those peoples and the self-image of the society that produced such

¹⁷ This is not to say that (national) peoples do not display common features distinguish them up to some point from other (national) peoples. Fukuyama (1995), quoted in Chang (2008), argues that the existence of a variety of trust extending beyond family members affects economic development and that its absence in the cultures of countries like China, France, Italy and (to some extent) Korea hinders the effective management of large firms. In the area of cross-cultural psychology, Triandis *et al* (1988), for example, compare the United States, Japan and Puerto Rico as regards individualism and collectivism, amongst other dimensions. Triandis (1993:155-180) also talks of the cultural syndrome which “can be identified when shared attitudes, beliefs, norms, roles, values, and other such elements of subjective culture, identified among those who share a language, historic period, and geographic location, (a) are organized around a theme, (b) there is evidence that the within-culture variance of these constructs is small relative to the between-cultures variance, and (c) there is a link between these patterns of subjective culture and geography.” In a worldwide study of 116,000 employees of I.B.M. in 1980, Hofstede (1980), also institutionally located in the area of psychology, ranked 40 cultures according to the strength of individualism or collectivism (Goleman, 1990).

¹⁸ Quoted in Rovisco (2001).

¹⁹ Quoted in Borgatta and Montgomery (2000).

²⁰ *Idem*. Quoted on page 1650.

²¹ *Ibidem*.

discourses. In Kaplan's (1996) rendering of Pratt (2008(1992)), at the beginning of the nineteenth century writings associated with travel influenced occidental science and literature, as well as foreign policy for several generations. "By the turn of the century (...) travel had become a crucial part of the imaginative capacities of the middle and upper classes in Europe and the United States." (Kaplan's words:50). In Greece, accounts of *fin-de-siècle* travellers to the country were translated into Greek and debated in the local press. (Pecham, 1999).

The influence of TW is also contemporary. Pratt (2008(1992:238) argues that "the tropes and conventions of travel writing [examined in her book] are still with us, often in mutated form, like the imperial relations they encoded." For Tavares (2004:9), the academic focus on TW produced during the colonial period has emphasized that although the age of empire (at least in its most obvious version) is past, the legacy of its world-view continues to determine how Westerns relate to the rest of the world.

Clancy (2008:2) maintains that if Anderson's (1983) conception of nations as being "imagined" is correct, the role of scholars is to identify and track who or what precisely is imagining the nation. Further, besides being based on notions of difference, nationalism stems from the idea of authenticity (Bendix (1997:7). The search of authenticity has already been identified in TW (Sharp, 1999 and part of the FLO corpus being analysed under this study) and is a hallmark of the sociology of tourism and the definition of modernity and postmodernity (MacCannell, 1999(1976); and Urry, 2002(1990); as developed in the literature review chapter). There is, then, a case for studying TW and FLO not only as objects of scientific interest *per se* but also as building blocks of (ideas of) nations and as influencing tourism.

Tourists are often attracted by the sheer sensorial experiences a place can provide (e.g., a pleasant climate) – a motif which seems sometimes forgotten by the sociological literature on the subject, as further discussed in the chapter to follow – but they obviously choose based on other criteria. In this context, Robinson (2004:304) is clear about the capacity of TW in influencing holiday decision-making: "[it] can act as a precursory source of imagery of the tourist's destination, or as an endorsing, deeper reservoir of cultural location during and after a visit".

In a complex view, Urry (2002(1990):145)²² argues that the *tourist gaze* implicates "both the *gazer* and the *gazee* in an ongoing and systematic set of social and physical relations" organised by professionals such as photographers, writers of travel books and guides, local

²² In the final chapter added in the 2002 edition.

councils, experts in the 'heritage industry', travel agents, hotel owners, designers, tour operators, TV travel programmes, tourism development officers, architects, planners, tourism academics who produce “technical, semiotic and organisational discourses that are combined to 'construct' visitor attractions” (same page).²³

The power of representations of society and nationality has not escaped those charged with luring or directing tourists. For example, in tourist literature starting as early as the 1950s and extending to the beginning of 1990s certain “Irish” icons are presented as representative of “premodern society”, as per O’Connor, 1993)²⁴. For Olins (1999)²⁵, in globalised world where there is intense competition for foreign and domestic investment, tourists, and consumers, nations must engage in the same type of branding that companies adopt. More generally, nation-states cultivate their unique reputation as an increasingly important part of their strategic capital (Van Ham, (2001)²⁶ and branding even serves as a soft power that aids in the conduct of diplomacy (Quelch and Jocz, 2005)²⁷. FLO and its subgenre TW may therefore play an important part in marketing a country or in interactions between states – which is especially important for a country (Portugal) showing a hypertrophy of tourism and emigration (Sousa Santos, 1993). Additionally, if tourism is a defining element of modernity (MacCannell, 1973) or postmodernity (Urry, 2002(1990)), (details in the literature review chapter) the role FLO plays in the construction of the tourist attraction makes it more than an interesting subject in itself and its study promises contributions to larger issues in social science.

The epistemological weakness of the genre in terms of its production process is another reason to study it. Despite their potential and actual significant influences, the literature of fact on otherness is much less (or not at all in many cases) subject to the same degree of systematic peer review than science. Although scientific results must always be deemed provisional and subject

²³ Such influences can be seen at work surrounding the success of the above-mentioned Peter Mayle’s books on Provence, which have “led some to fear his work has begun change the imaginary and physical landscape, as more people seek the place and the experience that he describes” (Sharp, 1999:201). Also, the number of pilgrims along the *Camino de Santiago* has increased by 20 per cent since Hape Kerkeling’s (2009) *Ich bin dann mal weg* (translated in English as *I’m Off Then: Losing and Finding Myself on the Camino de Santiago*) was published (Centre for Travel Writing Studies at Nottingham Trent University website:

<http://www.studiesintravelwriting.com/publications.php?id=594>).

²⁴ “Constructing a timeless, ethnically pure and bucolic Ireland in the face of modern, post-industrial, urban, secular, immigrant, and consumerist society [a construction in which tourism promotion bodies also participate] serves as an important internal brand for citizens, distinguishing them from the British, Americans, and Europeans in general.” (page 20, quoted in Clancy, 2008).

²⁵ Quoted in Clancy (2008).

²⁶ Idem.

²⁷ Ibidem.

to refutation, they are specific kind of knowledge at least in their production, validation and verification methods. As highlighted by Bourdieu (2001), scientists have as (main) audience other scientists who are their competitors and face incentives to challenge them as regards their work, science thus possessing a “vast collective equipment for theoretical construction and empirical validation or refutation” based on the “real as referee” [my translations from the French version] (page 52). This also opposes radical criticism of science (no claim can be certain or a claim only translates the social position of the claimer) as self-destructive (if that were the case not even the claim “no claim is certain” would itself be certain).

More specifically, Sokal and Bricmont (1997)²⁸, in line with Bourdieu, hold that the workings of the scientific community generally lead to unmasking deceptions while in the philosophical and literary realms there is no possibility of highlighting a deception that might be recognized as such in those realms. Such specificities of science both create the possibility of carrying out the present study and make particularly relevant the study of FLO, an epistemological weak(er) genre producing social effects as significant or even more significant than those of science (given its wider audience) in a contemporary society marked by reflexivity and a **double hermeneutic** process in which efforts and information used to understand social reality become part of reality, contributing to shaping it (Giddens, 1990).

1.5 – The reader and the researcher: external analysis versus internal analysis

Considering such relevance of FLO, this study intends to focus on structures and patterns of the genre, as well as in portrays it produces of the countries / societies (or their subspaces) in which authors travel or live. Because portrays are received by readers and generate social effects mostly through readers (mediators such as critics and other media professionals mostly aim at readers when discoursing about texts within the genre), it becomes necessary to define an operational concept of the reader to consider texts (also) from her/his point of view.

The concept of reader has been developed within literature studies. Iser (1978) distinguishes the “real” type (which can be considered out of reach of analysis as by definition s/he cannot be subject to abstraction) and the “hypothetical” one, which he notes is frequently subdivided in the “ideal” and the “contemporary” reader. In his view, the former cannot be said to exist objectively, while the second, though it exists (despite, one should note, being a subtype

²⁸ Quoted in Bouveresse (2001).

of the “hypothetical”) it is difficult “to mould to the form of a generalization.” (page 27). Iser also mentions other types of reader posited by other authors: the super reader, the informed reader and the intended reader.

Given the general character of this notions does not make them very helpful in terms of empirical research, a different strategy is be adopted that highlights some obvious traits of (the) reader(s) and resorts to some basic assumptions. First, s/he is a person able to read, someone with a minimum level of literacy; second, s/he spends time reading a work and probably reads on an ongoing basis, which denotes some degree of intellectual curiosity and the possession of a minimum of information processing capacities. These characteristics make it possible to suppose an **“average” reader**, assuming a law of great numbers as a simplification device similarly to what is usually assumed by propaganda, advertising or marketing in their persuasion efforts.²⁹

Matching the definition of FLO above, such reader is also assured by the a specific **horizon of expectation (Todorov and Berrong, 1976)** or **narrative pact (Villanueva, 1992)** which takes the form of a pact of factual reading (Champeau, 2004) by which, unless otherwise advised, FLO is expected to include only non-fictional, sincere accounts of an experience and/or information deemed truthful about the places in which the experience took place.

Such notion of the average reader is important because it supports, for example, an expectation of a positive correlation between the number of times a given image shows up in a book (say, an image of *conflict / violence / aggressiveness / rudeness / absence of integration*, one of the themes identified in the corpus under study) and the probability such book would contribute to attaching such an image that sort to the country / culture to which it refers, influencing attitudes and behaviour (e.g., in driving away a would-be tourist who would read the book).³⁰ As a minimum, it seems possible to assume that the reader is both an **“ordinary person”** and a **“reasonable person”**, assumptions (or enthymemes) Edmondson (1984:110) sees as part of a type of rhetorical mechanism she found in sociology texts and which she calls rhetorical deduction. In such context, ordinary individuals “make attitudes and behaviour intelligible by showing that they are what could be expected of anyone in a comparable situation” (page 112) and reasonable individuals assume “attitudes (say) as those which sensible people in the

²⁹These activities rarely or never involve expenditure in targeting individual persons in their unique attributes, but instead direct messages to groups of people, who implicitly, then, are deemed as having common characteristics in what regards their structures and processes of reception.

³⁰ The (perceived) *intensity* of the images would, of course, bias this effect.

situations concerned could reasonably take” (page 127). Edmondson also distinguishes “arguments in terms of reasonableness [“attitudes and behaviours intermixed with feelings, relationships and general views about life”] and those in terms of rationality, which are concerned with aims and choices in their relationships to defined ends” (page 127), amounting, then, to the enthymeme of the “**rational person**”, which could be also be added to the definition of the reader.³¹

Another characteristic of the reader is that her/his activity is usually undoubtedly more leisurely and careless than that of a researcher (e.g., the author of this study) who (hopefully) looks in a professional, systematic, analytical, exhaustive way to texts. Based on this distinction, the point of view of the reader is called *external* and the point of view of the researcher is called *internal*. If the researcher intends, however, to consider the possible social effects an external reading might produce, he should perform both an *external analysis* – assuming the more limited epistemological stance of the reader and aiming to outline the vision s/he might be expected to construct based on the reading – and his more extended *internal analysis*, aiming at extracting the maximum of information regarding the organization and contents of the text, a task which cannot be expected to be performed by the reader.

By analogy with the ethnographic work (Sardan, 1995) one can see the external analysis as using **emic** categories (those used by the “native” figure of the reader) and the internal analysis as using **etic** categories (those used by the “ethnographer” researcher).³² In practical terms, though, in some cases it may be difficult to distinguish emic from etic (as methodological section 3.9 illustrates), mostly so if the reader/writer is a contemporary individual of a Western world, as is the case, marked by reflexivity (Giddens, 1990, as seen above and as developed in the literature review below). Some overlap may then be expected between common sense concepts and scientific ones, with important implications in the methodology adopted in this study and in the interpretation of its results – namely, such overlap justifies that the images of the social world found in the text are categorized 1) according to themes derived from the text itself, following **Glaser and Strauss's (1967) grounded theory** (although the intention here is not to generate

³¹ Such premises will be necessary, *inter alia*, to identify what is and what is not an *image of the social world* in the corpus and classify such images in *themes* (see methodology chapter).

³² There is, of course, on another plan, the classical duality etic/emic between the categories of the writer and those of otherness.

theory but to systematically and comparatively read the corpus), but also from a 2) priori notions informed by social science or from 3) both, where they overlap.

1.6 – The selection of the corpus: exclusive focus on the texts and the specificities of Southern Europe identified by social science

It is assumed that one of the main purposes of the present study – identify, describe and classify the images of social Portugal and social Spain conveyed by a set of works – can be achieved without information external to the texts being studied (such as sociobiographical data regarding authors). That information will also be dispensed with in the internal analysis, despite the many studies on TW, particularly on non-contemporary works, focusing both on the texts and on extra-textual elements on authors, as well as the historical context in which they travelled and wrote (for example, Pratt, 1992; Vicente, 2003). This decision is made in part on practical grounds, given the foreseen difficulty in collecting such type of information, but is also due to the inadequacy (as argued in the literature review chapter) of the “theory of the reflex” (Goldman, 1964)³³, which prompts a rejection of the ambition to present the social environment as cause of literary (in our case, non-fiction) works. If any social agent possesses some agency power, then writers, it is assumed, given their special autonomy in their intellectual creations even according to proponents of the theory of the reflex (Bourdieu, 2006), possess *a fortiori* (more) autonomy.

Information regarding authors that is external to text can be relevant *per se* or as part of less reifying forays into explanation, of course³⁴. However, based on preliminary readings this study assumed that the texts being study contain elements sufficient to suggest the existence of relations between, on one side, attributes of the authors (which are in some cases provided as intra-textual elements such as prefaces or back cover information) and, on the other side, patterns of their writing. It is also assumed that the pact of factual reading underlying FLO (Champeau, 2004, as seen above) makes it unlikely that the majority or even a significant part of the authors working within the genre depart in what they write vis-à-vis what they experience to the point of distorting dimensions considered important in this study (these are, *inter alia*, their condition of

³³ Quoted in Dirx (2000).

³⁴ The above-mentioned study by Vicente (2003) on the travels of the Portuguese Prince (and future King) João V describes and suggests interplays between the social standing as member of the royalty, his modes of travelling, his interests when abroad and his gaze. It is based on the diaries of the Prince but also on secondary documents such as letters and information from other sources, such as references to the composition of his entourage when moving throughout the North of Europe in the first half of the nineteenth century.

nomad versus sedentary; their status as tourist, traveller or migrant³⁵; their gender; are their degree of professionalization).

It is now necessary to define the criteria used to select the corpus. First, the emphasis of FLO on first-hand account leaves out travel guides and works such as Marion Kaplan's (2006) *The Portuguese: the land and its people* which, being organized by subjects (such as history, geography etc.) which, using a third-person, impersonal narrator, are formally closer to the ethnography (or, more generally, the monograph). It is also established that only books are considered (rather than shorter texts as those appearing in travel magazines) on the grounds that only a longer extension allows for the manifestation of certain patterns.

On the other hand, this and the necessity that the texts to be studied include accounts of actual experiences the narrator had within otherness eliminates as candidates “works of journalistic and of essayistic nature which reflect in general and abstract terms on contemporary Portugal” and which “are not based on an actual journey” (Matos, 2002:5, my translation from the original Portuguese), a category Matos also excludes from TW. On methodological section 3.8, below, such criterion is stated more formally based on the notion of sources of knowledge.

The present study therefore does not consider works such as *Portugal - O Sabor da Terra, um retrato histórico e geográfico por regiões* (*Portugal - The Taste of Earth, a portrait of historical and geographical regions*), by historian Mattoso *et al.* (1997), which does not verify the above criterion. The same applies to *Um olhar português* (*A Portuguese gaze*), edited by Barros (1991), a group of texts commissioned to 13 authors under the theme “a look upon our country”, given the shortness of each contribution and the fact that only six are non-fictional (Matos, 2002). *Viagem a Portugal* (*Journey to Portugal*), authored by the Portuguese Nobel Prize of Literature José Saramago is also excluded given not only the year of its publication (1981) is outside the period deemed relevant for selecting the corpus (as detailed in the next paragraph) but also due to its almost exclusively focus on monuments and its exclusion of the world of work (Matos, 2002; Besse, 2004).

Other work excluded was anthropologist Pina-Cabral's *Aromas de Urze e de Lama: Viagem de um antropólogo ao Alto Minho* (*Scents of Heather and Mud: The Journey of an anthropologist to Alto Minho*)³⁶: despite the title, the author presents it as “ethnopoetic located

³⁵ Distinguished according to criteria established in section 4.2.

³⁶ Edited by Fragmentos, Lisboa, 1992 and reedited in 2008 by Imprensa de Ciências Sociais.

somewhere between experience and fiction” (back cover). Books on the Portuguese society by sociologist and journalist Miguel Esteves Cardoso are also outside the scope of this study because, although non-fictional and often based on experience, they were originally published as independent newspaper columns and therefore differ from the book format being considered. (They might deserve, nonetheless, an analysis in their own right, given their originality vis-à-vis previous perspectives on Portugal and the Portuguese people of philosophical and historical nature such as those by Eduardo Lourenço and José Gil.)

Works published before 1986 are not considered, on the grounds that this was the year in which Portugal and Spain entered the then European Economic Community (latter, the European Union), a fact that prompted important changes in both countries. Of course, as it is known, membership into European institutions also has *ex ante* effects (e.g. requirements regarding macroeconomic indicators or practices in the judiciary) and some effects take long to materialize; however, this was considered the best milestone to mark the beginning of “contemporary”.

This is also a period not much studied as regards FLO, the less so by social science. According to Matos (1999:5), TW of the last decades of the twentieth century has received little attention from “critical interest” (meaning Humanities), which have been centred on the Renaissance and colonial times. Further, if FLO has potential to generate significant social effects, the study of contemporary images might be useful to inform tourism promotion. Also, given the proximity between FLO and tourism (the former may in some cases be deemed a mediated case of the latter), its study allows up to some point to test sociological theory, such as MacCannell's (1999(1976)) proposition of tourism as the search for the authenticity lost in modernity.

The choice of Iberia

Books about Iberia are chosen because Portugal is the home country of the author of the study and Spain is the only country with which has a land border, being therefore an historical and actual benchmark, at least for the Portuguese. The decision stems also from the fact that these two countries had important overseas empires until as late as 1975 and to study what is written about them thus reverses the usual relation analysed in studies on TW by post-colonial studies (a domain described with further detail in the next chapter) – that is, between a colonial / former colonial writer and colonized / formerly colonized individuals and societies object of

her/his gaze. Some specificities of Southern Europe societies identified by social science (detailed below) make it relevant as well to verify whether and how they are reflected in FLO, although it can be of course expected that, given its high degree of abstraction, scientific findings on this matter might deal with dimensions not prone to (direct) observation, which is the type of source of knowledge / information more used in the kind of books at hand, as is seen below in this study.

In this later regard, Portugal and Spain are located in the semi-periphery of Immanuel Wallerstein's (1974) modern world-system³⁷, at the centre of an axis having as extremes countries which are dependent and countries on which the former depend; similarly, Portugal is considered by Barreto (1996:60) “the most peripheral country in the centre” [my translation from the Portuguese original]. Despite that at least since 1980 Portugal and Spain have been in the top quartile (meaning “very high human development”) of the UN's Human Development Index (which includes the majority of the countries of the world)³⁸, noting such intermediate positioning is important. Postcolonial studies tend to reproduce the East-West dichotomy or presume Europe or the West to be a homogeneous concept, according to Dainotto (2007:173)³⁹, who studies “the way in which nineteenth-century ethnographies of the European South were had been historically inspired, and even directly modelled on previous notions of what constituted the Orient”⁴⁰. This author therefore proposes adding the matter of Southern-ness to Said's work, claiming that “the deviant, the internal Other of Europe, is a Southerner” (54). In his own the words:

Southern Europeanists seem to have found in Said [*'s Orientalism*] a new lexicon to discuss the old facts of [Europe's] internal colonialism. Franco Cassano's [1996] *Southern Thinking (Pensiero meridiano)* opened with a clear echo of Said's notion of the “objectified” Orient: “Southern thinking means, fundamentally, to give back to the south its ancient dignity as subject of thought; to interrupt a long sequence in which the south has been thought as an object by others.” Also Franco Piperno (1997), in *Elogio dello spirito publico meridionnle* denounced the prejudice of southernism (meridionalismo) – its

³⁷ As mentioned in Weir (2007). Although Wallerstein's classification refers to a period outside that being considered in the selection of the corpus for this study (it focus on what it sees as a movement toward a worldwide capitalist economy, starting from 1470, according to Weir), it is assumed that such condition of semi-periphery might up to some point remain or produce current specificities in Iberia.

³⁸ Results retrieved from <http://hdr.undp.org/en/data/explorer>, December 12th, 2011.

³⁹ Quoted in Hester (2007).

⁴⁰ According to Hester (2007).

reduction of the south to a premodern relic of the past – in a way that what quite reminiscent of Said's indictment of the Orientalist prejudice. (173)

A complexification of this tendency is identified by Pecham (1999), who finds in end of nineteenth century TW visions of Greece both Western and Oriental – “European”, familiar and ordered but conceived as exotic and oriental. This intermediate position connects well with Wallerstein's (1974) notion of semi-periphery and raises the question of whether current perspectives of Portugal and Spain match such in-between position, with consequent effects in realms such as international politics or tourism (as seen above).

Similarly, Sousa Santos (1993) finds traces of First World and Third World in Portugal, a country which according to him also shows an intermediate position in the distribution of production and employment amongst the primary, secondary and tertiary sectors. Within Wallerstein's (1974) framework, he considers that Portugal performs peripheral functions relative to the production and consumption patterns of core European countries, as shown by the hypertrophy of tourism and emigration. More contentious is his claim that Portugal is as well midway – instead of being in the upper echelon – in terms of Gross Domestic Product *per capita*, at least if the scope of comparison is the whole world, as in Wallerstein. As mentioned above, at least since 1980 Portugal and Spain have been in the top quartile (meaning “very high human development”) of the UN's Human Development Index (of which GDP *per capita* is a major component).

Generally, Southern Europe is characterized by late industrialization and late introduction of market economy when compared with Northern Europe (Sapelli, 1995). In Portugal the industry did not reveal capacity to compensate the loss of jobs entailed by the decay of agriculture (Almeida, Costa and Machado, 1994) and has never been the main driver of job creation, a case uncommon in the Western world (Barreto, 1996). Also, a significant part of individuals and family of rural extraction who changed their main activity to the industry or the services maintain small, family-run agricultural undertakings, mostly in the North of country (Barreto, 1996), and more than one third of Portuguese families maintain connections to the primary sector (Hespanha and Carapinheiro, 2001).

Partially related to this is Sousa Santos's (1993) concept of **welfare society** (*sociedade-providência*), a set of relations of community, knowledge interchange and mutual help which

partially fills what he sees as the deficit of the Welfare State in Portugal. At the same time, civil society is weak (Barreto, 2002), as shown by very low percentages vis-à-vis average 1990 European figures as regards membership of associations (half the average) and voluntary work in associations (one third of the average) (Vala, Cabral and Ramos, 2003).

On another dimension, Sapelli (1995) finds patronage in the South of Europe, in tandem with García and Karakatsanis (2006:125): “the particularistic nature of Southern Europe Welfare State is maintained even today through the persistence of patron-client relations”. In Portugal, the notion of *semi-welfare state* or *quasi-welfare state* describes a public administration lacking resources (social spending much below the North European average) and the absence of the notion that social benefits are a right, not a favour – in the view of both public servants and potential receivers of benefits (Sousa Santos, 1993; Hespanha and Carapinheiro, 2001). According to Sousa Santos (1993), notwithstanding insufficient State intervention – a view maintained by other authors such as Barreto (1996) and Mozzicafreddo (2000) – and non-meritocratic relationships, the highly heterogeneous Portuguese society (in economic, social, cultural and political terms) has reached a high degree of social cohesion through the cross fertilization and mutual neutralization of such differences, mostly through the State.

García and Karakatsanis (2006) further hold that despite moves to modernity, traditional cultural, political and institutional influences persist in the South. Barreto (1996 and 2000) finds in Portugal a clear, fast economic and social modernization in the last decades of the twentieth-century; there are still insufficiencies and mismatches, with some sectors and institutions reaching the modernity of Western societies and others located in an inferior levels of development, but even the latter are no longer agricultural, patriarchal, patronage-based, focused on subsistence, without access to public services nor social protection, nor its values are close to those of the *ancien regime*. Notwithstanding, Portugal is still a society “deeply contradictory and unbalanced”, showing wishes characteristic of the core and debilities characteristic of the periphery (Barreto, 2000:60) and its modernity is still unfinished (Almeida, Costa and Machado, 1994).

Serious insufficiencies prevail in the education system and in the fact that in the 1990's the illiteracy rate was still not residual as in most of Europe (Costa and Viegas, 1998; Barreto,

2000)⁴¹. The development of the middle class and the improvement in consumption patterns did not have a positive influence in reading habits in Portugal (Barreto, 1996), with the number of the circulation of newspapers and magazines per inhabitant showing figures quite behind other European countries (Barreto, 2000). At a moment when the Portuguese society reached a development stage in which one would expect the arising of demand for written information, the television already fulfilled the need for information (Barreto, 1996). To this can be added that high internet use in the country⁴² might promote reading, albeit the internet could be an important provider of non-written content.

The focus on contemporary works on Iberia is also a particularly significant task as recently (2011) the Portuguese Government has agreed with the International Monetary Fund, the European Central Bank and the European Union a bail-out package to help support its fiscal imbalance and refinancing public debt, entailing austerity measures additional to those that have been taken in the aftermath of the late-2000s global financial crisis (troubles to some extent currently common to Spain) after a decade of slow economic growth since the beginning of the millennium.

The choice within Portugal and Spain

Based on the criteria established above, four works (described in the following section) are selected for Portugal:

- Hewitt, Richard (1999), *Uma casa em Portugal*, Lisboa, Gradiva (originally published as *A cottage in Portugal* (1996), London, Simon & Schuster)
- Llamazares, Julio (1998), *Trás-os-Montes: uma viagem portuguesa*, Lisboa, Difel
- Hyland, Paul (1996), *Backwards Out of the Big World: Voyage into Portugal*, London, Harper Collins

⁴¹ The above-mentioned “insufficiency” of the Welfare State should not be considered necessarily as a sign of underdevelopment or premodernity, given they can be a policy option, as shown by well known “insufficiencies” (e.g. in health protection before the so called Obamacare reform being implemented) in terms of the State provision in the United States.

⁴² Portugal’s Internet penetration in early 2006 was “high even by European standards. Broadband take-up is also considerably above the European Union (EU) average.” (<http://www.internetworldstats.com>).

- Proper, Datus C. (1992), *The last old place: A search through Portugal*, London, Simon & Schuster

By the time this investigation was initiated (2005), these four works were the only fulfilling the above-mentioned criteria in the case of Portugal. As the set of candidates for Spain was much vaster, other criteria were added in order to restrict it to a number similar to that of Portugal. They intend to guarantee a varied sub-corpus made of “exemplary models instead of aiming at a comprehensive coverage”, a path followed by Blanton (2002:xi) in choosing his own TW corpus. This is a principle similar that followed by Atkinson (1990) in choosing the objects of his textual study of anthropology: he did not resort to specific sampling methods, considering such process unnecessarily restrictive and implying that the relevant characteristics of the objects are known in advance.

It is thus decided as a first criterion to include books written by women. According to Clark (1999)⁴³, the subgenre is more tentative, more empathetic and oriented towards others and, therefore, more prone to present people as individuals. In the same vein, Siegel (2004:1) holds that critics have seen women’s TW as less directed, less goal-oriented, less imperialistic, and more concerned with people than place⁴⁴. Focusing on British travellers in Tibet in late nineteenth century, Procida (1996:74) holds that “the general tenor as well as the details of the men's travel narratives affirm the authors' affiliation with the boyish hero of adventure tales. Sport and athleticism generally provide the dominant motif.” Lisle (2006:95) also implicitly defines “feminine” by holding that

the public persona of the travel writer is empowered by a masculine, rational and aggressive organising scheme that succeeds to the extent that it writes over feminine characteristics in the self and in others. It is masculinity that marks the travel writer out as independent: it differentiates travel writers from passive groups of tourists, it gives them the objectivity through which they can identify and dominate difference, and it helps them repress any feminine characteristics that might reveal weakness on the journey.

⁴³ Quoted in Mills (1991).

⁴⁴ She cautions, though, that “without sufficient attention to determinants such as race, class, location, historical circumstance, and power – to name just a few – any conclusions drawn about women’s travel become meaningless.” (:1).

The notion of men's strength and woman's weakness can of course be dismissed as regarding only physical instantaneous strength (e.g. to push something or someone): women's life expectancy is higher than men's, many women endure a double working journey outside home and at home and are usually more to bear the burden of care of ill or disabled people in her primary group (socialization, of course, plays a part in some of these facts). Anyway, one does not need to assume the existence of feminine specific traits to expect differences in women's FLO vis-à-vis texts of the kind written by men, because certain differences can be assumed as stemming from social expectations regarding gender within otherness. According to Roberson's (2001: xiv)

women tend to experience travel and mobility differently than do men, in large part because of women's traditional ties to home, family, and domesticity, and because of their sexual vulnerability and objectification at the hands of men

Moreover, such different expectations tend to entail different experiences, with women having for example easier access to women's worlds and in some cases even to masculine worlds if their are perceived as strangers in Simmel's (1950) sense or as fragile (and therefore not menacing)⁴⁵.

Additionally, the subcorpus on Spain includes both nomadic and sedentary writers, the former being travel writers in the usual sense while the latter are subsumed in the more general category FLO writer, as they live for some time within otherness. A detailed differentiation between sedentary, nomad and nomad's subcategories (tourist, traveller, and migrant writers) is presented in section 4.2, where the implications of the form of contact with otherness are discussed.

It was also decided to consider both well established and non-professional writers, of which are extreme examples Camilo José Cela, who by the time his *Nuevo viaje a la Alcarria* (*New Journey to the Alcarria*) was published had been a famous writer for decades⁴⁶; and Franck Arencibia, author of *Spain: Paradox of Values / Contrasts of Confusion*, who self-published his work. The importance of including authors with different status in the literary field and the

⁴⁵ Miranda France, one of the authors of the corpus to be studied writes in *Don Quijote's Delusions* that her pregnancy possibly provided her better access to a gypsy camp.

⁴⁶ His membership of Real Academia Española (Royal Spanish Academy), an official language normalization body, dates from 1957.

emphasis on subjectivity displayed by Arencibia's subtitle (*A Foreigner's Personal View*) justify his selection for the corpus, despite the book being organized by topics, much in the same way as Marion Kaplan's (2006) *The Portuguese: the land and its people*; additionally, including *Spain* in the corpus has the advantage of following Korte's (2000) principle that "the analyses of TW must not be confined to texts whose style strikes us as particularly 'literary'".

Taking into account these criteria, the following works on Spain were selected (and described in detail in the next section):

- Stewart, Chris (1999), *Driving Over Lemons: An Optimist in Andalucia*, New York, Phanteon Books
- Evans, Polly (2003), *It's Not About the Tapas: A Spanish Adventure on Two Wheels*, London, Bantam Books
- France, Miranda (2001), *Don Quixote's Delusions: Travels in Castilian Spain*, London, Phoenix
- Arencibia, Franck (2003), *Spain: Paradox of Values/Contrasts of Confusion - A foreigner's personal perspective*, New York, iUniverse
- Cela, Camilo Jose (1986), *Nuevo viaje a la Alcarria*, Barcelona, Plaza & Janes

1.7 – Presentation of the corpus⁴⁷

Richard Hewitt, the author of *Uma Casa em Portugal* (titled *A Cottage in Portugal* in the original English version, although here only the Portuguese version is used and (back) translated as needed) grew up in the United States, attended eight universities in several parts of the world and had several professions (including those of professional golf player, fireman, architect and translator). Together with his wife, a painter, he moved to Portugal in the mid-1980s⁴⁸, acquiring a ruined house with no electricity nor piped water supply in the village of Eugaria, next to Sintra, around 25 kms from Lisbon, the capital city. His text is mostly made up of descriptions of the local landscape and accounts of the troublesome process of renovation of the house, a job which

⁴⁷ This section intends to draw a general view on authors and works. All information is extracted from the later, except in one case, for which the source is presented. Such external information, however, is not necessary (nor it is used) in the analysis of the texts carried out by this study, in keeping with the principle of sticking to the texts.

⁴⁸ This is inferred from a reference to the explosion of the space shuttle Challenger in which seven astronauts died (page 129).

the reader comes to know he had performed in his native country. Despite initial tensions in the relationship with the local inhabitants, the couple ends up by integrating well⁴⁹.

Julio Llamazares is a novelist, poet and chronicler born in the province of León, Spain. In *Trás-os-Montes: uma viagem portuguesa (Trás-os-Montes: A Portuguese Journey)* he narrates a five days journey through the main cities and isolated villages of the region. The social contacts with local inhabitants (and also emigrants, given the trip takes place in August, when most return to attend local celebrations) are brief, sometimes made difficult by his lack of knowledge of the Portuguese language⁵⁰, although occasionally the author manages to establish short dialogues with people he finds on the way. Contrary to Richard Hewitt, his text is mostly made of descriptions of the physical landscape (fields, churches, palaces) and references to associated historical events, together with notes and reflections on the daily life of the traveller (where he sleeps, what he eats, what he feels).

Paul Hyland, the author of *Backwards Out of the Big World: Voyage into Portugal*, is a published British poet and travel writer who visits the country during the mid-1990s⁵¹. He moves mostly along the river Tagus, that is, through the central regions of the country, but the social world to which he refers and which he classifies is often the whole country. Even strongly than in Llamazares, the text focuses in great part on a past Portugal through references to literary figures, historical characters and events which are often evoked through their physical remains.

Written by travel writer Jan Morris, the preface of *The Last Old Place – A search through Portugal*, by Datus C. Proper, informs that the American author is a former diplomat, a linguist, “a lover of literature and history” and an angler. He is able to communicate in Portuguese⁵² (having lived in Lisbon between 1978 and 1982⁵³) and wants to know a country “top-heavy with history”. Similarly to Hyland, he spends much space dealing with historical events, but his travel is different in that he is accompanied by a former local lawyer presented as a friend (he is often a fellow river rod fishermen), who acts an informant and is a case of Portugueseness for the author.

As Richard Hewitt, above, Chris Stewart, the author of *Driving Over Lemons – An Optimist in Andalucía*, mentions in his text a varied professional background (both authors distinguish

⁴⁹ For example, upon being stolen, they are comforted by several neighbours (page 205); they align themselves with the rest of the population in demanding public piped water supply (several parts of the narrative); and are asked to stay when in the end of the book decide to sell the house due to financial straits (page 214).

⁵⁰ For example, on page 24 he assumes not understanding what is being said.

⁵¹ As can be deduced in pages 4 and 5 from a reference to a roadblock mentioned by the local media.

⁵² Page 27.

⁵³ Page 42.

themselves from the others in this). Until he moved into Spain, the Briton collected data for travel guides in several parts of the world, worked as musician in restaurants and as sheep shearer⁵⁴. The book is the account of the period he lived with his wife (and partially also with their daughter, who is born meanwhile) in a remote farm in the region of Alpurrajas (or Alpurraja), next to Sierra Nevada, Andalucía province, Southern Spain. It describes living conditions harsher than those Hewitt faced in Eugaria village, the efforts the couple makes in trying to improve habitability (including the restoration of the house and a small bridge linking to the farm), the difficulties of his new metier as shepherd, sheep producer and subsistence farmer, as well as the relations with the local population. Contrary to what the title might suggest, movement through space is hardly present, and the subtitle is also misleading in that almost all references regard the Alpujarras region and not Andalucía region.

Polly Evans (*It's Not About the Tapas: A Spanish Adventure on Two Wheels*) is a British former editorial assistant and journalist who travels 1600 km on bicycle during six weeks, revisiting at the age of 31 the country where she had lived for one year as undergraduate student in the city of Plasencia, almost a decade before (this period is occasionally described). She distinguishes herself from the other writers of the corpus by the importance given to the physical challenge of pedalling, and meets people by chance (no encounter is presented as pre-arranged). In between the descriptions of landscape, inhabited places she passes through and travellers' trivia (accommodation and food, etc, as in Llamazares), the work includes references and characterizations of Spain, the Spanish people and some subgroups thereof. In tandem with other writers of the corpus, Evans also considers the past (which takes more than one fifth of her text), focusing on grand historical figures (she mentions lower social layers only twice)⁵⁵.

Similarly to Polly Evans, Miranda France (a British writer whose previous *Bad times in Buenos Aires* received significant recognition, according to information contained in the edition used) describes in *Don Quixote's Delusions - Travels in Castilian Spain* her first sojourn in the country, (1997-1998 in the capital city of Madrid, as a university student) and a visit ten years later. During the first period, which sometimes surfaces in the account of the second, she narrates life in Chueca area, where prostitution and drug use and dealing are frequent, describing her neighbours who include young opponents to Latin American authoritarian political regimes.

⁵⁴ Pages 24 and 166.

⁵⁵ Pages 46-47 and pages 50-51.

Cervantes's *Don Quijote de la Mancha* conducts the second period of the narrative, in which France moves through the province that gives title to the book inspired by the work but also looking for and finding specific information regarding the country. Although together with Paul Hyland and Datus Proper she manifests an *a priori* intention of gathering knowledge on otherness by visiting places which she deems relevant, for them (the idea of) Portugal conflates present and past, while France is in search of knowledge on contemporary Spain (e.g., upon finding references to Castilian separatism, she tries and manages to find some of its representatives), which she presents as clearly distinguished from past Spain.

Born in 1960 in the USA (where he lectured Business and Marketing in several universities and worked as “Criminal Court Records Specialist”) Frank Arencibia organizes his *Spain: Paradox of values / Contrasts of confusion – A Foreigner's Personal Perspective* in sections, each corresponding to a theme. Still, in line with the subtitle the feel of his work is not that of the monograph (general information about a place) or the guidebook (“tourist” information about a place), as the voice of the narrator is in the first person and includes references to many personal experiences. The description of social contacts the author experienced while living in Madrid as an English teacher are used to infer or sustain claims about social Spain with a high degree of generality⁵⁶. His approach towards the country is undoubtedly the most negative of the works under study (as the both the quantitative and qualitative analysis show), not only in terms of content but also in structural terms (namely, in what regards the forms of knowledge used). Arencibia also stands out as the sole self-published writer of the corpus.

In *Nuevo Viaje the la Alcarria* (*New Journey to the Alcarria*) the Spanish author Camilo Jose Cela, later Nobel Prize of Literature, revisits in the mid-80s a Spanish region located 50 km northeast of Madrid, which had originated his former *Viaje a la Alcarria* (*Journey to the Alcarria*), published in 1946. While the first journey was made alone on foot⁵⁷, this time Cela is a famous writer 70 years old who is driven in a Rolls-Royce, presides over literary prize award ceremonies, writes autographs and notes the commemorative plaques which register his first passage in the region. Occasionally he performs comparisons between the past and the present he observes (or which he assumes to exist), but the central theme of the work is, as we will see,

⁵⁶ This is described in detail below, both quantitatively and qualitatively (section 4.9 and Annex).

⁵⁷ According to the text. In fact, Cela acknowledged elsewhere that he made the trip accompanied (Henn, 2004).

more the travel writer than the knowledge of the places travelled. Finally, Cela also plays with knowledge (and the search and questioning of it) as a literary mechanism.

Chapter 2 – Literature review

2.1 – Summary

In view of an almost complete absence of sociology (and anthropology to a less extent) as regards studies on factual literature on otherness, an overview of scholarship produced both within social science and the humanities dealing with the factual writing on otherness is presented and discussed. This extends to literature studying texts produced by social science, as its method of analysis is deemed worthy of consideration for the goals of this study.

Based on an illustrative case of scholarship produced within humanities (dealing with one of the authors of the corpus being studied here), it is argued that its analyses on TW and FLO tend to suffer from the vague / common sense nature of terms and concepts and the issue of the **implicit quantification** (the presence of words or expression conveying quantity without actual figures being quoted). Therefore, their non systematic, non exhaustive perspective justifies the quantitative methodology here adopted.

The postcolonial tendency to see any discourse on the other as cultural domination is also discussed. Besides considering academic critiques on such position, an argument is made that emphasis on difference, rather than on objectivity, could partially explain some negative views conveyed by FLO (and even early “scientific” discourses such the Orientalist one), tempering the accusations of outright prejudice that may be made to the holders of those views. The related duality humanism/cultural relativism is also considered as a basis for its later application to the corpus.

Social science literature on tourism is reviewed as it provides useful concepts for the analysis of the corpus, being namely the basis of, among other relevant distinctions, a typology including the tourist, the traveller, the explorer, the migrant and other related figures into which a travel writer might be classified, which will be useful later in this work. Such typology is much related to the issue of (perceived) authenticity, which helps to construct it and is an important issue in itself: several concepts of authenticity are therefore discussed, including as opposition to capitalism, mass production, social structure and as affirmation of the self.

(Perceived) authenticity of social structure, in turn, is seen as opposition to cultural hybridity and as related to the distinction traditional society versus modern society, in which traditional society is seen as associated with authenticity through nostalgia. In this context, MacCannell's argument that tourism is a search for an authenticity that has been lost in modern society is discussed, pointing out to possible gaps relative to empirical data that this work will later tries to fill. It is noted that nostalgia was present at the very onset of the distinction traditional society versus modern society, but it is argued that the distinction proves solid as built through a series of oppositions sustained by social science. The notion of traditional/premodern will later be useful to approach representations of Iberia while, specifically, the notion of modernity fine tunes the concept of reader and will be used in discussing several patterns found in the corpus.

2.2 – Introduction

This chapter intends to present a review of the literature relevant for the study being conducted. It does not aim at a full review of the sociology of literature nor has as purpose to cover thoroughly other domains that study TW and FLO such as literary studies, cultural studies and postcolonial studies – but it will consider significant works within such domains which are deemed relevant⁵⁸. Specifically, although it considers gender a relevant category in what regards travel writers, as argued in the previous chapter, it does not carry out a full review of the corpus of scholarship on TW by women (specific studies on the subgenre are quoted as appropriate in the subsequent chapters). In addition, sources are sometimes cited which are not or cannot be deemed a) scientific, b) academically peer-reviewed or c) published in an academic or prestigious publishing house. Still, this is done not to use results produced by such sources but to extract citations of or references to works falling in categories a), b) or c) and in cases where it can be assumed that they are credible enough to produce a truthful citation or reference⁵⁹.

Possibly because FLO is a phenomenon that assumes a written form, most of the focus on the genre has come from scholars within the humanities / literary studies and transdisciplinary areas such cultural studies and postcolonial studies (demarcations and major relevant theories

⁵⁸ A general description of studies on travel writing can be found in Campbell (2002).

⁵⁹ This principle aims mostly at wikipedia.com, which is quoted a few times in this work. It also justifies a quotation of the Spanish philosopher Ortega y Gasset on the expression used for travel books in Arab tradition, which is included in a communication presented in the website of Asociación Española de Personalismo (Spanish Personalism Association).

provided below). The fact that these scholars sometimes use methods and focus akin to social science along with the fact that, irrespective of the validity of their methods from the point of view of social science (within which, of course, there are different views regarding methodology) their hypothesis and conclusions might be worth considering as hypotheses and possible contextualizations and explanations by a sociologist navigating off the beaten sociological track, makes it worth consider such methods. A critical examination of this body of works, therefore, informs a more encompassing view on the corpus which this thesis investigates. Consequently, the present literature review covers studies within various academic fields which have FLO as their subject.

This also becomes necessary due to the almost complete absence of sociology (and anthropology to a less extent) from studies on FLO, according to the bibliographical research carried out for the present study, a result which is corroborated by Hulme and Youngs (2002a). In their Introduction as editors they claim, along with Campbell (2002, article in the same work), that there has been recently a very important increase in TW studies within the literary and cultural studies, history, geography, and anthropology as well as “various interdisciplinary alliances and projects among them” (Campbell:265), producing a “body of interdisciplinary criticism which will allow the full history of the complexity of the genre to be appreciated” (Hulme and Youngs, 2002a:1).

Detailing such endeavours, Campbell speaks of critics of literature and culture, feminist theorists and historians, interdisciplinary journals and New Historicism. Anthropologist Clifford Geertz is quoted in this context, but only by reference to his concept of “thick description”, while the work of anthropologists Clifford and Marcus (1986:273) is presented as a dissection “of ethnographic texts and the situations of their production with the fine tools of literary and rhetorical analysis”⁶⁰. The sole reference to sociology are the University of Essex Conferences and Symposia on the Sociology of Literature, and even in these events humanities predominate⁶¹,

⁶⁰ This work is dealt with more detail in a subsequent section of this chapter.

⁶¹ Within The Essex Sociology of Literature Project these meetings were held between 1976 to 2001 with an almost yearly regularity in some periods, involving, as organisers and editors, members of staff and graduate students from various departments in the School of Humanities and Comparative Studies at the University of Essex. 8 individuals worked in the area of literature (one being Hulme), one in the area of philosophy, one in art history, and only two were formal sociologists. (Information retrieved from the website of the Project, <http://www.essex.ac.uk/lifts/soclit/scindex.htm>). In 1997 the subject was “Studies in Travel Writing” and 10 papers were produced, one by Campbell herself, (who is professor of English and American Literature), another by Youngs (reader in English and US studies); the remaining papers were authored by people also in the area of English and/or Literature, with the exception of one “independent scholar” with multidisciplinary interests (Alasdair Pettinger), one

while the same is true of authors included in other collective works dedicated to TW and even in Hulme and Youngs (2002a).⁶²

Social science touches FLO mostly through a related area. According to Hulme and Youngs (2002a:9), “sociologists have extended their concerns to the study of tourism and of other travel practices and metaphors”. Although the focus on tourist activities and meanings does not address TW directly, it becomes important for analysing FLO because, as it is seen below in detail, it proposes, among other relevant distinctions, a typology including the tourist, the traveller, the explorer, the migrant and other related figures into which a travel writer might be classified.

The absence of anthropology or sociology in studies on FLO does not mean, of course, that these disciplines cannot be pursued outside institutional boundaries, given a scientific discipline is mostly defined by its method rather than by designation or subject. As can be seen below in this chapter, certain studies on FLO can be located within sociology according to such criteria, although they are not sufficient in number to allow the conclusion that the application of sociological (or social science) methods to FLO is well established.⁶³

Before analysing research dealing with literature in general and specifically with FLO it is, however, necessary to discuss and clarify the notions of authenticity and the dichotomy traditional society versus modern society. These concepts not only inform part of the remaining literature review (helping, for example, to understand the activity of tourism, with possible repercussions on perspectives on FLO) but are also be themselves objects of quantification within the corpus.

case in History, one case in Anthropology (Neil Whitehead) and one case of a Philosophy lecturer in a Sociology department (Ted Benton at Essex). The information regarding professional attachments was retrieved from the institutions' websites.

⁶² The majority of articles in Hulme and Youngs (2002) are authored by scholars of literature, the exceptions being history, post-colonial studies and one case of anthropology, with sociology being absent. In Siegel's (2002) *Issues in Travel Writing – Empire, Spectacle and Displacement* there is an even stronger bias towards literature (with sociology once more absent) and in Dodd's (1982) *The Art of Travel – Essays on Travel Writing* the predominance of literature is absolute.

⁶³ Interestingly, as it can be seen below in this chapter, one of the very few academic works that can be deemed sociological identified by the bibliographical research carried out for this study is institutionally located outside sociology.

2.3 – The quest for “authenticity” and (“)tradition(”)

Authentic derives from the Greek “*authentes*”, which both means “one who acts with authority” and “made by one's own hand” (Bendix, 1997:14)⁶⁴. In social science the concept has recently been taken not as an essence (the “genuine, unadulterated, or the real thing”, as defined by Theobald, 1998:315) – which would mean that some people, things or behaviours are authentic and that criteria exist to identify them – but mostly as a social construction, as per Vannini (2009)⁶⁵. For Vannini, “authenticity is not so much a state of being as it is the objectification of a process of representation, referring to a set of qualities that people in a particular time and place have come to agree represent an ideal or exemplar” (:3). In the same vein, Wang (1999:351)⁶⁶ holds that “things appear authentic not because they are inherently authentic but because they are constructed as such in terms of points of view, beliefs, perspectives, or powers”, adding that the ideal of authenticity can be characterized by either nostalgia or romanticism (the association regarding the latter, having one detractor, as seen below). **Nostalgia** is in turn defined by Turner (1987:152-3)⁶⁷ as the loss of a sense of home or as sense of loss of rural simplicity, traditional stability and cultural integration following the impact of industrial, urban, capitalist culture and alienation, via consciousness, from the “life-world of the human species”.⁶⁸

⁶⁴ The issue of authenticity has been treated within philosophy, a summary of such treatment being provided by Baugh (1988) as regards two major writers in the field. In his rendering of Heidegger, “human beings are authentic when they make their existence their own by deciding for themselves what it is to be a human being” (page 478). For Sartre “authenticity involves assuming responsibility for one's existence in its entirety, including those aspects one encounters as given. One does this by conferring a meaning upon one's self and circumstances, not just by taking up an attitude towards them that reveals them in a certain light, but by acting to change what one encounters as having already been there, in accordance with a value one has chosen” (page 478). Baugh also sees in common to both philosophers the notion that “one is authentic (...) when one's existence is organized on the basis of the chosen end of one's individual existence as a finite transcendence, when this end is chosen in the awareness of the contingency of the choice, and of what the situation makes possible for one's ‘being-in-the-world’” (page 479). As it is seen, below, and as expected given the generality of these definitions, they accommodate several forms of authenticity as seen by the eyes of social science.

⁶⁵ The world construction is problematic here, as scientific concepts are also a construct. There is difference, however, in that scientific concepts are objects of critical reflection for the scientific community and aim, by (most) definition(s), to find empirical content in order to affirm their existence as a reflection (however simplified or exaggerated) of a real world. Further, the field of sociology of science (Bourdieu, 2001), as mentioned in the introductory chapter, highlights science as a specific activity in that certain phases of its production process are public and in which the participants (scientists) have competitors (other scientists) as their clients (e.g. the readers of scientific journals).

⁶⁶ Quoted in Ivanovic (2008).

⁶⁷ Quoted in Featherstone (1995).

⁶⁸ Both concepts are detailed below within the presentation and discussion of literature on tourism, below.

Hobsbawm (1992 (1983)) has called attention into the recentness of some traditions, which he shows as invented at some point in time, presenting them not as something which might have evolved organically over centuries in such a way as being considered somewhat a collective multigenerational work, but as originating in the efforts of single individuals or small groups, in some cases even stemming from the intervention of outsiders, including colonial powers favouring or making specific interpretations to colonial subjects' practices.⁶⁹ The **relation between authenticity and tradition** (discussed in more detail in the following section) is evidenced by Robinson (2004), for whom the notion of authenticity, which originally was used in the context of museums and referred to objects, came to acquire a different meaning as regards "immaterial elements such as language, festivals, rituals or even tourism experiences in general": "something is considered authentic if it is made, produced or enacted by local people according to custom and tradition".

Ultimately, the fascination with "tradition" (which is by definition "authentic")⁷⁰ seems to be an implicit preference for a description or a utopia of history and society made of self-contained social structures immune to the powers of agency and hybridity, hence isolated.⁷¹ This attitude is found within social science itself by Bendix (1997:9), who holds that folklore studies have "nostalgize[d] the homogeneous" [she is here using an expression by Kapchan (1993:307)] and decried 'bastard traditions', thus upholding the fallacy that cultural purity rather than hybridity is the norm". This can be seen in TW, where the most common reaction to the decline in (perceived) authenticity is a nostalgic posture towards the pre-tourist era, when cultural difference had not been blurred by cultural interpenetration (Nixon, 1992).

Still according to Bendix, and echoing Hobsbawm:

⁶⁹ Hobsbawm has been criticized by Linnekin (1991:447) for distinguishing between "genuine" and "invented" traditions: "Symbolically constructed traditions are therefore not inauthentic; rather, all traditions – Western and indigenous – are invented, in that they are symbolically constructed in the present and reflect contemporary concerns and purposes rather than a passively inherited legacy." In a similar vein, Handler (1984), quoted in Bendix (1997), argue that such distinctions between invented and authentic traditions "resolve themselves ultimately into one between the genuine and the spurious, a distinction that may be untenable because all traditions (like all symbolic phenomena) are humanly created ('spurious') rather than naturally given ('genuine')" (pages 1025-1026). These comments do not seem, however, to consider Hobsbawm's definition of invention of tradition as the initiation of a practice which does not claim to be old by the time it is firstly enacted and which initiation is promoted by powers external to a community and/or by individuals (either external or internal). This would oppose non invented traditions, meaning practices which arising without a purpose external to themselves (e.g. a musical form gradually developed amongst peasants at work in the fields as against a Communist Party promoting revolutionary songs to raise class awareness), and that have changed over time through socialization to its present form.

⁷⁰ It should be noted that traditional society is deemed an essential concept in social science, as discussed below.

⁷¹ Authenticity can also be located in "individual genius" (Bendix, 1997:47), a notion that is of course most common in the field of art, as per Benjamin's (1973) notion of aura (developed below).

Folklorists (...) for a long time located authenticity within the anonymity of entire social groups, or the “folk.” Lack of identifiable authorship, multiple existence over time and space, variation of the items, and the social and economic circumstances of the “bearers of tradition” served, instead, as ways of testing folklore's authenticity. (page 15)

In such view folklore focus on a kind of “authentic tradition” or “authentic culture”, going along with (incomplete) dictionary definitions that see it as the oral culture of a people (when it includes at least material non-oral elements). The absence of writing can be seen here as a barrier isolating the community/society and promoting “tradition” and “authenticity”, the reading of news from the “outer world” being one major form of corruption of “purity”, at least until the arrival of other communications vehicles with significant non written content, such as radio, television and the internet⁷².

The issue of “purity” arising out of isolation is also addressed by Featherstone's (1995:136) rendering of classical anthropology, within which “the assumed isolation of the tribal societies (...) is assumed to lessen the problem of ‘contamination’, and preserve in a purer form the unique features which can be assumed to cohere into an integrated whole.” Contemporary anthropology, at least of the sort presented by Clifford (1988:273), sees cultures “not as organically unified or traditionally continuous but rather as negotiated, present processes”. For him, by intervening in an interconnected world,

one is always, to varying degrees, “inauthentic”: caught between cultures, implicated in others. Because discourse in global power systems is elaborated vis-à-vis others, a sense of difference or distinctness can never be located solely in the continuity of a culture or a tradition. Identity is conjectural, not essential. (page 11)

In another dimension, Elias (2000 (1939)) finds authenticity in eighteenth century notion of culture (as opposed to civilization) concluding, after quoting private letters of the time:

⁷² Lowenthal (1999) holds that societies without writing must rely on “folk memory” (full quotation on page 49, below).

On the one hand, superficiality, ceremony, formal conversation; on the other, inwardness, depth of feeling, immersion in books, development of the individual personality. It is the same contrast which was expressed by Kant in the antithesis between *Kultur* and *Zivilization*, relating to a very specific social situation. (page 18)

Authenticity is searched and discussed, therefore, not only at societal level but also the level of the self. Generally, when the focus moves to the latter, social structure is seen as imposing inauthenticity upon the individual, such as in the notion of civilizing process posited by the above-mentioned Elias (2000 (1939)) (although he can only be seen as dealing with the issue of authenticity in as much as the civilizing process amounts to an intensification in the social control of “authentic” impulses, as he makes no direct reference to the concept).⁷³

Based on Goffman's (1959) dramaturgical perspective, Vannini (2009a:61) points to a tension between an individual's desire for authenticity and the need for social approval. He distinguishes between being a “more or less person” rather than one's own “true self” all the time, “more or less person” being an actor that understands that social life demands secrecy and thus a certain measure of insincerity and inauthenticity. The “true self” could be seen as unrestricted agency while the “more or less person” would be an individual being constrained up to some point and in certain dimensions by social structure.

The notion of authenticity as freedom from social constraints can also be seen as an element of Humanism (a concept developed below) in that according to Borgatta and Montgomery (2000)

sociologists operating in the humanist tradition hold that the study of society begins with the premise that human beings are free to create their social world and that whatever impinges on that freedom is ultimately negative and destructive. (page 1246)⁷⁴

⁷³ Civilizing process should not be confused with intensification in *Zivilization* (as opposed to *Kultur*). Rather, it a process in which individuals get ever more integrated with others through greater interaction and increasingly through the mediated / abstract presence of others – e.g. peer pressure on the control of impulses (which results in this specific case in an intensification of *Zivilization*) or the threat of the use of force by State to enforce certain rules or punish their disregard.

⁷⁴ Interestingly, no position was found in scholarship dealing with the notions of traditional society and modern society (developed in the next section) supporting the thesis that the passage from one to the other, which in part involves Elias's (2000 (1939) civilizing process, could have meant an increase in authenticity defined as freedom from social structure – a thesis which is present in Enlightenment / Humanism thinking, associated with the idea of submission only to reason. This is so despite that traditional society is defined by the dominance of the “authority of the examples of the past, of old people and traditional cultural authorities” (Parker *et al*, 2003) and modern society conducted by reason. Rather, as is seen in next section, many academic perspectives see modernity as entailing

Lewin and Williams (2009) have provided empirical support to the idea of authenticity as an inner search on the part of the individual in the work edited by Vannini (2009), who summarizes Lewin and Williams' findings in the following way:

authenticity is both a moral quest toward the value and practice of self-discovery and an effort to attain identity and stability in the ever-fluctuating and (relatively) anchor-less maelstrom of fleeting trends, panics, and doubts of postmodern society. (page 6)

Within a punk subcultural scene they find authenticity in the de-emphasizing of play, irony, pastiche, style, and conspicuous display of taste (no mention to punk's often distinct personal appearance), and by emphasizing instead existential and ideological commitment to a movement's ideals.⁷⁵ Within such movement, being authentic means being creative, rejecting the *status quo* and engage in values of self-reflection, self-discovery, originality, and a concern with a "deep felt Humanity – typical of the Romantic philosophy of the individual [and] living to laws of [one's] own being and choice". (:6)

Authenticity portrayed as a struggle against the conventions of society became a frequent theme of modern literature and art in the late-nineteenth century (McCarthy, 2009:243), but such version was predated by authenticity as emphasis on the self. According to the definition of Romanticism by Lewin and Williams (2009):

By the middle of the eighteenth century the sensibilities of Enlightenment ideals had begun to incense some young intellectuals, writers, musicians and artists. Identifying themselves as **Romantics**, these young cabals prioritized the virtues of intuition, imagination and feeling over reason and method. (page 65)

Romantics emphasised intensity of emotion and sensation, poetic mystery in opposition to intellectual clarity and individual hedonistic expression (Feifer, 1985). Specifically, Romanticism suggested that one could feel emotional about the natural world and scenery (Urry, 2002(1990)).

constraint or tension on people and therefore inauthenticity. For MacCannell (1999 (1976)), as detailed below, the search for modernity's lost authenticity is the very defining characteristic of modernity.

⁷⁵ Interestingly, freedom from (larger) society is reached by belonging to a subculture.

Urry's notion of the “romantic gaze” (developed below) is associated with the romantic notion that the self is found in solitary contemplation of nature, and Urry sees it closely related to the notion of (artistic) aura. Referring to Benjamin (1973), Urry claims that

to say that a cultural phenomenon had aura was to say that it was radically separated from the social, it proclaimed its own originality, uniqueness and singularity, and that was based in a discourse of formal organic unity and artistic creativity. (page 46)

The association between the romantic and the authentic is not straightforward for Urry, however. First, he holds that for Benjamin, the forms of postmodernist culture “do not proclaim their uniqueness but are mechanically and electronically reproduced and the value placed on the artistic work is challenged through an emphasis on pastiche, collage, allegory and so on” (:46) (note the similarity with the punk scene mentioned above); based on this, Urry finds in the romantic gaze elements that can be classified as postmodern (a condition, as is seen below in this chapter, in which the idea of authenticity is frowned upon or taken with irony)⁷⁶. In his view, much of what is appreciated in the romantic gaze is not directly experienced reality itself but ideal representations conveyed by photography, postcards, guidebooks, television and the internet. (It would seem, then, that the romantic aura has somehow survived large-scale reproduction.)

In some cases, the (object of the) romantic gaze is reproduced in order to be commoditized (that is, transformed in goods that are traded in markets) and some views hold that capitalism is a sterile ground for authenticity to thrive. According to Vannini (2009:10)

A large body of literature (...) has surveyed the (im)possibility of achieving authenticity within capitalist production and consumption. Dating as far back as the classic arguments of critical theorists⁷⁷ (...), much of this literature is marked by (at best) a strong scepticism toward the idea of the culture industry producing authentic products of any kind. The critical idea underlying such scepticism is (...): authenticity is a hook employed either to sell products and services (e.g. Beverland, 2005; Rose and

⁷⁶ For Urry, however, postmodernism coexists with are other cultural elements in a given society (premodern, realist, modernist).

⁷⁷ The very concept of alienation in Marx, who as it is known influenced critical theory, can be considered as opposing authenticity, namely when it regards workers' detachment from the products of their work.

Wood, 2005), or a hegemonic discourse through which various ideologies are articulated (Bramadat, 2005; Charmé, 2000; Coupland, 2003; Heynen, 2006).

Bendix (1997) notes the paradox that

once a cultural good is declared authentic, the demand for it rises, and it acquires a market value. Unlike an authentic Van Gogh, folklore [or “tradition”, as argued above] can be endlessly replicated and imitated – any member of the “folk” should be equipped with the skill and spirit to produce some lore. Individuals all over the globe have been sufficiently savvy to alienate themselves far enough from their traditions to market them. (page 8)

Quoting Bausinger (1971:203), she writes that “it is best not to use the prefix 'folk' at all because as soon as something is presented as genuine folksong or genuine folk architecture, it loses its authenticity. Bendix also points out that “to scholars and ideologues engaged in commenting on culture, efforts to promote and market folklore invariably lead to a perceived loss of authenticity, because students of culture until recent years have considered ideological and market forces as outside agents that spoil folklore’s authenticity” (page 9).

More generally, some stances of opposition or at least reserve towards capitalism could be seen as unsatisfied with an abnormal state of affairs generated by wealth accumulation (and subsequent inequalities in this regard) out of a deemed initial, natural, authentic situation of material equality between human beings. In this light, the Communist ideal would be a return to such state of equality but overcoming the uncertainty and scarcity of hunter-gather economy and the subsistence economy of traditional society, accumulation of capital now being performed by the State (as in Lenin's proclamation to the Eighth Congress of Soviets in 1920 that “Communism is Soviet power plus the electrification of the whole country, since industry cannot be developed without electrification”).

Communism, in turn, would be subject to another type of critique that some quests for authenticity would also apply to at least some types of capitalism: that of scale. Extending the above-mentioned disapproval of the products of the cultural industries, the fascination with home-made or artcraft production amounts to dissatisfaction with massification, a product at hand losing its “authenticity” if one knows there are many more exactly the same. Ultimately, though, the problem is in the process of production rather than in the product itself, as many small-scale

production processes generate multiple indistinguishable works to the naked eye of the user. Fitting the notion that authenticity is predominantly about representation (as seen above), an object would then be authentic by representing a non massified production process (fitting one of the meanings of authentic presented at the beginning of this chapter as what “made by one's own hand”).⁷⁸

Not far from this, Sapir (1949:322)⁷⁹ associates the notion of “genuineness” with the possibility of a social creativity⁸⁰. For him, genuine cultures provide individuals both with a rich corpus of pre-established (traditional) forms and with the opportunity to “swing free” in creative endeavours that transform those forms. In this ideal situation, it seems, agency and structure are perfectly balanced and the latter both empowers and restrains the individual so that tradition maintains a sense of identity and purpose, allowing people to express themselves.

Most views on the dichotomy traditional society/modern society (detailed in the section to follow) focus on what the latter does not provide. Bridging in a different way the approach to authenticity from the perspective of the self with that of the societal point of view, Turner (1976) holds, in Lewin and Williams' (2009:66) rendering of his proposition that:

Late capitalism has destabilized the institutions that once provided people with opportunities to attain meaningful self-concepts through fulfilment of social duties and roles. These changes increasingly motivate people to abandon socially obligatory identities and instead turn inward in order to find and feel their 'real selves' and reality more generally.

Lewin and Williams (2009:66) claim thus that a quest for authenticity has become dominant in advanced industrial societies, “serving as a life-boat to keep them afloat in the uncertain seas of postmodernity”.⁸¹

⁷⁸ Marx, of course, implicitly criticized large scale with his concept of alienation of the worker (it stems from specialization, which is associated with large scale, albeit the later relation may have recently been changed with mass customization production techniques). Still, it is not easy to see how, apart from the sheer enthusiasm for “singing tomorrows” (possibly only of future generations) or as remote owners of production processes via the State, workers in the industries such as those mentioned by Lenin would be less detached from the products of their work than their capitalist peers.

⁷⁹ Quoted in Handler and Linnekin (1984).

⁸⁰ The social (not specifically artistic) nature of this creativity is clear when Sapir holds that “the subtlest and the most decisive cultural influences of personality, the most fruitful revolts, are discernible in those environments that have long and uninterruptedly supported a richly streaming culture.” (page 322)

⁸¹ As empirical support for this, they quote studies in the realms of food, art and selfhood, to which could be added a work by Kidder (2006:349-371), who has concluded through direct participant observation that the values attached to

Lewin and Williams are among several authors who maintain that modernity is characterized by a certain level of dissatisfaction, which can be generally seen as a sense of inauthenticity, and which looks inwards or elsewhere – to other existing societies deemed (more) authentic or backwards (to vanished societies) – to overcome such dissatisfaction. For some scholars the search for authenticity is also the *raison d'être* of tourism (MacCannell, 1999 (1976)) and even of travel: referring to late-twentieth-century travel writers, Blanton (2002) holds that

A search for authenticity, wholeness and meaning often drives their journeys as did for travel writer in the past. Yet, the understanding that authenticity is not a stable entity, but a “predicament of culture” is most often the final realization of this most recent travel writing. (xiv)

Before entering the subject of tourism and travel (writing), however, it is useful to approach more deeply the concepts of traditional society and modern society, because they are strongly connected with the concept of authenticity and also inform the analysis of tourism and travel as cultural phenomena.

2.4 – Traditional society, modern society and proposed subsequent stages⁸²

Tradition and traditional society

Tradition has been part of social science also as an essential concept, that is, as something which might be objectively observed, albeit such view is not universal.⁸³ Shils (1981:12) holds it is simply anything transmitted or handed down from the past to the present, in tandem with Rhum (1996:325-355) who considers it a descriptive term covering practices observed from generation to generation, and differentiates “traditions” from tradition (no inverted commas). Similarly to Shils and Rhum, Ivanovic (2008:13) claims that “tradition refers to transmitted

illegal races held in open traffic allow the bike messengers of New York City who participate in them to form stable identities and stop being “lost in collective effervescence”.

⁸² This section serves as a base for the establishment of the framework of analysis (methodological chapter), whose results (general results chapter) are also interpreted in view of some of the concepts hereby presented and discussed.

⁸³ For Langlois (2001), quoted in Wikipedia, although the notion of tradition in the early sociology of the end of nineteenth and beginning of twentieth centuries referred to traditional society, contrasted to the modern industrial society, currently sociology sees tradition as a social construct used to contrast past with the present and as a form of rationality used to justify certain course of action.

elements of culture (language)”, adding to it a body of collective wisdom (knowledge) and customs that are passed from generation to generation”.

These references do not seem, however, to distinguish tradition from any transmitted culture or cultural element. Ivanovic adds a genetic dimension (if the culture of a group remains relatively stable for a prolonged period of time, “cultural uniformity and cohesion of the group, known as tradition, will emerge”) (:13) but in terms of the process of transmission the specificity of tradition seems to lay in the slow pace of change or outright absence of change in what is transmitted. **Tradition** would be, then, what is transmitted within a traditional society or a traditional community, where transformation – and transmission – is slow(er than in modernity).

One must distinguish, then, in what regards traditional/pre-modern versus modern society between, on one side, a pair of constructed or common sense concepts with various possible meanings (denoted by inverted commas) and, on the other, a pair scientific concepts, also with different contents (no inverted commas). The first pair is considered as having

central functions in legitimizing a state of affairs in a society being ideological constructs that serve to support the interests of those who wish either to maintain or transform society in ways concordant with their material or ideal interests (Rhum, 1996:326).

Some uses of “authenticity” may have the same intent but, differently, “traditional society” and “modernity” have well-established correspondents in social science, which proposes objective criteria to empirically distinguish between them. The distinction is to great extent based on the above discussed notion of tradition, as well as in that of community and locality.

As early as 1955, Hillary⁸⁴ identified 94 definitions of **community** in sociological literature. Featherstone (1995:103) claims that within sociology the term “**local**” has been associated with “the notion of a particular bounded space with close-knit social relationships based upon strong kinship ties and length of residence”. In this context “there is usually the assumption of a stable homogenous and integrated cultural identity which is both enduring and unique.”⁸⁵ Such notion of “local” stems, according to Featherstone, from the oppositions of

⁸⁴ Quoted in Borgatta and Montgomery (2000).

⁸⁵ According to Birx (2006:623), the observation Franz Boas (1928) made of the interaction between individual members of a community and the community as a whole “changed the way anthropologists approached what were formerly understood to be distinctions between modern and traditional cultures [:(...) there was no longer a basis for assuming traditional cultures to be unchanging and modern cultures exclusively dynamic, or in motion. Boas

mechanical versus organic solidarity (Durkheim) and **Gemeinschaft (community) versus Gesellschaft (society or association)**, by Tönnies.

According to Marshall's (1998) presentation of Tönnies's thesis on European modernization, the passage from community to association

proceeds through a rationalizing process, involving a move from relationships based upon family and guild to those based on rationality and calculation. **Gemeinschaft** was the world of close, emotional, face-to-face ties, attachment to place, ascribed social status, and a homogeneous and regulated community. **Gesellschaft** has come to be linked with urbanism, industrial life, mobility, heterogeneity, and impersonality. (page 239)⁸⁶

Debate exists within social science regarding the need for physical proximity in defining community. According to Griswold (1994), sociology uses two approaches in defining community: as a territorial concept (located in a map, with name, borders, landmarks, type of people and recognizable symbols); and as a relational concept (people who are tied together by “webs of communication, friendship, association and mutual support and although might not know each other, constitute a meaningful, self-aware collectivity”, echoing Anderson's (1983) “imagined communities”. Borgatta and Montgomery (2000:363) quote several authors arguing that “community can be achieved independently of territorial context where social networks exist sufficiently to sustain a quality of interaction and association” and refer specifically to McMillan and Chavis (1986) suggesting elements necessary to the existence of community that exclude physical proximity.

Even assuming that community does not necessarily entails physical proximity, the notion of traditional society is not weakened, because it is possible to conceive a type of community (the traditional one) which is physically close and other types of community which are not (such as a cyber-community). Debate exists, however, over the sheer possibility of existence of a physically and socially isolated community. As seen above Bendix (1997) claims that hybridity is much more common than cultural purity, while Featherstone (1995), who sees anthropology as an

proposed that there was room for both progress and enduring values in both types of society. It is assumed, however, that enduring values are more frequent in traditional societies and that change is slower there.

⁸⁶ Retrieved from quotation in <http://www.enotes.com/oxsoc-encyclopedia/gemeinschaft>.

intellectual source for the concept of “local”⁸⁷, holds that the borders of “locality” were problematic almost since the creation of the concept. According to him, anthropology was born as a science that “emphasized the need to provide ethnographically rich descriptions of the particularity of relatively isolated small towns and villages”. Soon, however, it “became clear that the most isolated community in Britain or in the United States was firmly plugged into national societies.”

The issue of locality does not question, though, the validity of the characteristics proposed by Featherstone when defining **premodernity** – close-knit social relationships based upon strong kinship ties and length of residence, as well as stable homogenous and integrated cultural identity. They can be seen as existing on the whole of a (national or a partition thereof) society which can therefore be considered premodern. Due to this and following the above-mentioned Hillary's (1955) content analysis of 94 definitions in sociological literature in which “area context” was one of sole three definitional elements in which there was agreement (the others being social interaction between people and one or more shared ties), this study adopts physical proximity and the face-to-face interaction enabled by physical proximity as part of the definition of traditional society.

This is also Simmel's (1950)⁸⁸ view, who contrasts modern, urban life with traditional, rural life, as well as that of Dartiy (2008), for whom *Gemeinschaft*-type relations require lasting physical proximity. In the same vein, Bauman (1987)⁸⁹ argues that the premodern world was made of relatively small, stable groups:

Villagers and town dwellers alike knew most of the others they were ever likely to meet, because they had ample opportunity to watch them (...) in all their functions and on most diverse occasions. Theirs were communities perpetuated and reproduced by mutual watching. (page 11)⁹⁰

⁸⁷ Besides being it also rooted on the notions of mechanical / organic solidarity and *Gemeinschaft* / *Gesellschaft*, as previously seen.

⁸⁸ Quoted in Cresswell (2006).

⁸⁹ Quoted in Cresswell (2006).

⁹⁰ Some authors even find face-to-face interaction important in itself to distinguish premodernity from modernity. Calhoun (1992) associates the rise of modern states to the growth of large scale social relations: increasingly, social life is carried out through some form of mediation – markets, communication technologies, bureaucracies – which remove face-to-face interaction from social relations. Although Elias (2000 (1939):451) does not use the concepts of traditional and modern society and identifies different significant moments and periods of transition (namely the period subsequent to the Middle Ages), he is somewhat in the same vein as Calhoun when he talks about a progressive “differentiation and lengthening of the chains of interdependence and the consolidation of ‘state controls’ [people face]”.

Other authors emphasise the importance of **face-to-face interaction** in distinguishing premodernity (and therefore, indirectly emphasise the importance of the physical proximity, which is necessary for the former to take place). Calhoun (1992) associates the rise of modern states to the growth of large scale social relations: increasingly, social life is carried out through some form of mediation – markets, communication technologies, bureaucracies – which remove face-to-face interaction from social relations. Elias (2000 (1939)), although not using explicitly the concepts of traditional and modern society and proposing different historical and transition periods (namely, the period subsequent to the Middle Ages), is somewhat in the same vein as Calhoun when he talks about a progressive “differentiation and lengthening of the chains of interdependence and the consolidation of 'state controls' [people face]”.

Despite noting the controversy surrounding the notion of locality, Featherstone (1995:103) himself speaks of “a continuum between small relatively isolated integrated communities based upon primary relationships and strong emotional bonding and the more anonymous and instrumental secondary associations of the modern metropolis”. Further, if traditional society is to be defined also by reference to tradition, it would be difficult to conceive the enactment of some traditional cultural forms (e.g. festivals), as well as social reproduction of the influence of the elder or of established ethics and practices, if the members of communities were spatially apart and unable to engage in face-to-face interactions, as sanctioning of deviation from norms would be hard(er) to enforce.

Tradition is in some views indeed a crucial element in defining traditional society (not only in the obvious etymological sense), as noted by Lowenthal (1999:369):

the earliest common use of the past was to validate the present. This perspective is still habitual in ‘traditional’ societies lacking a written language and wholly reliant on folk memory. In such societies empirical inquiry seldom revises received views, and tradition is the pre-eminent guide for behaviour, especially if the precedent is believed ancient and constant⁹¹.

⁹¹ Lowenthal's use of the word traditional without inverted commas seems notwithstanding to refer to a scientific concept because he objectively define such type of society. Moreover, his use of the word tradition does not contain inverted commas, which seems to point out again to a scientific concept.

More generally, Hollinger (1994:2) holds that traditional societies in Europe were rural, agricultural, authoritarian, religious, not much populated, more homogenous than modern societies and precapitalist or in early capitalistic stages. Campenhoudt (2003) sees the first modernity as opposing tradition and favouring the organization of collective life according to the criteria of reason. Following Max Weber, he claims that modernization consists in the shift from “traditional dominance” to “legal-rational domination” in a context where there is an almost total trust in the capacities of science to deal with human and material needs. In the same vein, Parker et al (2003:214) see the authority of the examples of the past, of old people and traditional cultural authorities as characteristic of traditional society.

Specifically, reason and its application, technology, can be considered as opposing magical **thinking** in as much as this is deemed a non-scientific causal inference that mistakes correlation with causation. In a form which he criticizes, Said (1978) detects this notion in the orientalist vision of the Arab people, who are ascribed the belief it is possible, through establishing relations with what is deemed the supernatural, to generate effect on what is considered the natural world.

Industry and modernity

Two concepts oppose that of **traditional society: industrial society**, as the designation implies, focus more on material aspects; and **modern society**, which includes social structure and culture. Borgatta and Montgomery (2000) define industrial society as using more technology and machinery, with substantial increase in communications, transportation, markets, and income. Industrial society is also characterized by the importance of urban life, the complexification of the division of labour and the increasing role of the state (bureaucratization in government and the economy), along with secularization and rationalization. Speaking of postindustrial society, they quote Bell (1973, 1989) (considered the best known and most complete analysis of postindustrial society)⁹², for whom codified theoretical knowledge and the expansion of the service sector are crucial distinguishing elements. Borgatta and Montgomery (2000) themselves consider **differentiation** as a central process defining modern society, along with Urry (2002(1990)) (in the case of the latter, specifically in opposition to postmodernity, as detailed below).

⁹² According to Kumar (1978), quoted by Borgatta and Montgomery (2000).

Inglehart (1997) posits a correspondence between the stage of industrialization/material satisfaction of a society, which roughly defines a stage in the course from premodern to modern, and its value systems, which range from traditional to those that promote economic growth. According to him, the shift from agrarian society to industrial society was facilitated by a departure from a worldview shaped by a steady-state economy that discouraged social mobility and emphasised tradition (which can here be taken as practices observed from generation to generation and changing slowly, as mentioned above), inherited status, and communal obligations, backed up by absolute religious norms, resulting in a worldview that encouraged economic achievement, individualism, and innovation, and where bureaucratization and science become predominant. Taken as a whole, these changes in practices and attitudes define the passage from traditional to modern society.

Inglehart is not alone in this emphasis on transformation as opposed to permanence of social and cultural patterns. **Hollinger** (1994) considers as main elements of **modernization** the increase in urban areas and population in general, capitalism, democracy, and science and technology, along with an increase in cultural, political and religious heterogeneity; **Featherstone** (1995) associates modernization with the increase in individualism, the formation of the state, industrialization, urbanization, marketization, rationalization, bureaucratization and work expansion and division.

Specifically on the cultural dimension, **Walsh** (1992) sees modernization as stemming from the emergence of modern science, a departure from the mythical/superstitious frameworks of the pre-Enlightenment period towards “claims for the possibility of objective truths about the world and ‘Man’s’ place within it” (page 7). This stance assumed the form of “**meta narratives**” (like Darwin’s Theory of Evolution, Marx’s analysis of capital and more generally the idea of progress, a faith in the ability of humankind to rationally manipulate and exploit their environments for the benefit of society), which are a “set of discourses concerned with the possibilities of representing reality and defining eternal truths” (page 7).

McCarthy (1984)⁹³ holds that the notion of material progress was accompanied by moral and political improvement, but several views of modernity share the identification of a general feeling of disarray/insatisfaction amongst the modern individual (for example, Lewin and

⁹³ Quoted in Walsh (1992).

Williams, 2009, as seen above). This often takes the form of nostalgia and is tightly related to the search of authenticity, as authenticity is often located in the past of traditional society.

Firstly, **nostalgia for traditional society** was present in Tonnies's very seminal *Gemeinschaft/Gesellschaft* pair⁹⁴ and can still be found much later in social science⁹⁵. More generally, *Burns et al* (2010:25) see it as the “ailment typical of modernity”, a sense of loss regarding “the organic ties which bound individuals to their community and to the land” and, as can be seen below in this chapter more in detail, MacCannell (1999(1976)) considers the search for authenticity by tourists as an essential symptom of modernity.

Several propositions could account for such state of affairs. Marx's classic argument sees workers feeling detached from the products of their work, while in modern society the origin and generation of products and services, including cultural ones (say a ball in the village versus satellite television) are less visible and more distant. Specifically in consumption, the roles of “professionals” removed from public access are increased and therefore quality is only guaranteed by a sometimes unjustified trust in such figures (Giddens 1990). Both dimensions of production and consumption are combined by *Jameson (1988)*⁹⁶, who holds that the increasing importance of capital removes people from the economic system of production which they serve and markets within which they operate. At the level of representations, “modernity implies the separation of symbol from that which it refers” (Friedman, 1992:855), as in MacCannell's (1973 and (1999(1976)) notion of staged authenticity, generating a sense of “melancholia”, as “the primitive does not really appear in these enactments” (MacCannell, 1992:19). More generally, the prevalence of reflexivity could be another cause, albeit it is associated with a specific, later phase of modernity (Giddens, 1990, detailed below).

Especially important for the study of TW and FLO are several views that define modernity not in terms of attributes of a society but in the ways it looks to otherness, in a relation usually

⁹⁴ “This image of the traditional community with its high level of normative integration and order, which has been so influential in constructing the image of society, is of course highly nostalgic. It reduced premodern societies to flatness and immobility. Those social units might be able to exist adequately without a high level of normative integration and common values are hardly considered.” Featherstone (1995:131).

⁹⁵ Sociologist Pierre Bourdieu “substituted Lévi-Strauss’s *tristes tropiques*, and its critique of modern civilization, with an image of *tristes paysans*, and an attendant critique of the influences of modern capitalism on traditional socioeconomic peasant societies. Bourdieu adopted a linear historical approach that could position peasants as examples of past societies in the present” (Reed-Danahay, 2005:70). In this case not only the Third World is involved as object of the gaze, as Bourdieu has written on late colonial Algeria (Kabylia region) and the Béarn region, in rural France.

⁹⁶ Quoted in Walsh (1992).

between a Western onlooker and colonial subjects or the Third World generally. Whitley (2002:18) claims that to be modern is to imagine the world in terms of a **linear history** in which “modern” people are placed in the more recent moment while “primitives” locate behind; similarly, Pratt (2008(1992):226) claims that modernity imagines a progressive process that eventually will make all nations equally modern. According to Errington (1998:5), “progressivist meta-stories” of the nineteenth-century sort depend upon the “primitive”, because the universal line of time needs a starting point from which to measure change and progress. To find the “primitive” otherness is, then, to travel back in time, a process which Dodd (1982) sees at work in Graham Greene's (1937) *Travel Without Maps* in Sierra Leoa and Liberia, where the writer returns to childhood, experiencing what he feels to be a more primitive stage of his own culture.

Varieties of postmodernity

For some authors, modernity would have been replaced by a subsequent stage in some societies (or parts thereof, much in the same way as traditional society would have remained in some areas and/or dimensions within modern society). For Giddens (1990:46) (who does not endorse the notion, as detailed below), **postmodernity** usually means

a general sense of living through a period of marked disparity from the past, (...) that we have discovered that nothing can be known with any certainty, since all pre-existing “foundations” of epistemology have been shown to be unreliable; that “history” is devoid of teleology and consequently no version of “progress” can plausibly be defended; and that a new social and political agenda has come into being with the increasing prominence of ecological concerns and perhaps of new social movements generally.

Borgatta and Montgomery (2000) note that like the more recent concepts of postmodern society and radically modern society, the concept of postindustrial society attempts to explain substantial changes experienced by advanced industrial societies since the end of World War II, a timeframe shared with Walsh (1992), which holds that postmodernity is a predominantly First World, probably more specifically Western capitalist phenomenon rather than a universal one. Studies on postindustrial society focus on technical and economic factors, while approaches to

postmodern society tend to emphasise political and especially cultural phenomena (Borgatta and Montgomery, 2000), in the same way as with the pair industrial society/modern society.

Bell (1976) and Lasch (1979)⁹⁷ see postindustrial society as highlighting consumption and personal gratification at the expense of themes highlighting self-restraint, work, commitment, and a sense of historical connection and continuity. This is in line with Inglehart (1997), who holds that the economic prosperity and the rise of the Welfare State after the Second World War in certain societies produced an increase in the sense of “**existential security**” based on the generalized feeling that survival could be taken for granted. According to him, the phenomenon promoted the rise of **postmaterialist values**, in which quality of life rather than economic achievement becomes the priority, and the favouring of value rationality (seeking human happiness itself), rather than instrumental rationality (equating economic growth with the good).⁹⁸

At the same time, if “with industrialization the erosion of religious social controls opened up a broader space for individual autonomy which was largely taken up by growing obligations to the state”, “the postmodern shift moves away both from religious and state authority”, increasing “individuation” (Inglehart, 1997:81), along with incredulity toward metanarratives (an attitude which for Lyotard (1984)⁹⁹ defines postmodernism). Despite the fragilization of the belief in science, the diminishing of the need of the reassurance of “absolute belief systems” (i.e., religion) due to a rising sense of security produces in postmodernization an intensification of the **secularization** process started with modernization (Inglehart, 1997:281)¹⁰⁰.

During (1993:170)¹⁰¹ presents three indicators intending to show that we live in a postmodern society. First, modernity can no longer be legitimised by the Enlightenment ideas of progress and rationality “because they take no account of cultural differences”, something which can be seen as implying the need for a cultural relativistic position and the impossibility of a humanistic stance proclaiming the universality of reason (the two concepts are treated in detail in

⁹⁷ Both quoted in Borgatta and Montgomery (2000).

⁹⁸ In wake of the worldwide late-2000's financial and economic crisis, of course, the view would need updating.

⁹⁹ Quoted in Walsh (1992).

¹⁰⁰ This maybe contested for the United States considering that according to Putnam and Campbell (2010), quoted in Wikipedia, 83 per cent of the people of the USA claim to belong to a religious denomination, 40 per cent claim to attend services nearly every week or more, and 58 per cent claim to pray at least weekly. Given the importance of religion in such a populous and geostrategically important and by many other standards and according to many views non-traditional society, religion (or its the importance) is not considered in this study an indicator of traditional society unless associated with superstition, as detailed in the corresponding section in the chapter on methodology).

¹⁰¹ Quoted in Burns (1999).

the following section). During's view is in line with Matos (1999:29), who defines **postmodernism** as a theoretical project aiming to question and deconstruct some of the conceptual and methodological models the West followed since the advent of the rationalist currents of the eighteenth century and namely the premise that those models are universal and atemporal. In the description of literary critic Terry Eagleton (1987), in postmodernism "science and philosophy must jettison their grandiose metaphysical claims and view themselves more modestly as just another set of narratives."¹⁰²

Secondly, During (1993:170) holds that electronic global media "has pushed distinctions between 'real' versus fake' and 'natural' versus 'unnatural' beyond recognition", which is associated to the third claim that "there is no confidence that 'high' or avant-garde art and culture has more value than 'low' or popular culture" (in other words, postmodernism entails the end of "authenticity", in its meanings defined above). For Borgatta and Montgomery (2000:2200) the conflation of high and popular culture illustrates a process of **de-differentiation** contrary to "the processes of bureaucratization and the division of labour characteristic of the [industrial society] assembly line." Urry (2002(1990):74) talks of the "a reversal of the long-term process of structural differentiation by which relatively distinct social institutions had come to specialise in particular tasks or functions." For him, postmodernism not only dissolves the boundaries between high and low cultures but also between different cultural forms such as tourism, art, education, photography, television, music, sport, shopping and architecture.

Here one should note the possibility that de-differentiation might be taking place in some dimensions but not in all – is Borgatta and Montgomery's (2000) conflation of high and popular culture somehow the inversion of bureaucratization and division of labour or are the three processes simultaneous? Also, one should bear in mind that academics such as Beck (1992), Giddens (1990) and Lash (1990)¹⁰³ oppose the idea that some societies have reached the new stage of postmodernity, seeing it rather a continuation of modernization in which reflexivity is a major element.

Giddens (1990)¹⁰⁴ prefers the notion of **radically modern societies** and sees **reflexivity** as the fact that efforts and information used to understand social reality become part of reality, helping to shape that reality. This generates high levels of self-consciousness, as persons seek to

¹⁰² Quoted in Harvey (1989).

¹⁰³ All mentioned in Wikipedia.

¹⁰⁴ Quoted in Borgatta and Montgomery (2000).

use personal resources to more reflexively construct personal identity and meaning, producing a sense of unease and powerlessness, a process which can be seen (also) as the cause of the above-mentioned nostalgia of modern societies, along with other tendencies identified by the author¹⁰⁵. There is an increased pace and scope of change (as in the unprecedented rapidity of change in modern technology), along with the phenomena of “time-space distancing” and “disembedding”: social relations which in pre-modern societies were predominantly of a face-to-face nature and happened in a given place are replaced by “relations between ‘absent’ others, locationally distant from any given situation of face-to-face interaction” (Giddens, 1990:18).¹⁰⁶ This goes together with the increase in (perceived) insecurity due to the degrading nature of modern industrial work, the growth of totalitarianism, the threat of environmental destruction, and the development of military power and weaponry (Giddens, 1990). To these state of affairs seemingly more unstable the media also contribute, it could be argued, when focusing on the negative extraordinary.

In what is sometimes called late modernity or liquid modernity, society now looks upon itself rather than being defined as opposed to traditionalism like the first modernity, as Campenhout (2003) (above) points out. It could be argued that in this phase the modern idea of progress as an ongoing and increasing distancing towards traditional society (or, more generally, the past) is not anymore disputed on the grounds of a desired return to tradition or the past, e.g. as in the Romantic movement, but permanently assessed in search of ways to better organize society based on a potentially infinite set of possibilities. In particular, Young (1995)¹⁰⁷ sees postmodernism as a self-consciousness of historical relativity and as questioning the place of Western culture in relation to non Western cultures. Goody (1986)¹⁰⁸ holds that all versions of postmodernism share a distrust or rejection of grand narratives and totalizing explanation systems, emphasis in micro, local or regional practices and focus on multiplicity and heterogeneity.

MacCannell might be deemed a predecessor of (the importance of) reflexivity, but he uses the notion to define modern society (not radically modern or postmodern society) and equates

¹⁰⁵ This presentation of some of Giddens's (1990) arguments stems from direct readings and from a summary by Aloy Canete, from Arizona State University, presented in <http://thinkingculture.blogspot.com>.

¹⁰⁶ In Anico's (2005) rendering of Giddens (1990), the globalization process is intimately related with the intensification and acceleration of “time and space compression” in economic, social and cultural life.

¹⁰⁷ Quoted in Kaplan (1996).

¹⁰⁸ Idem.

modern society with postindustrial society, while also dealing with the concepts of pre-modern society and industrial society. In *The Tourist: A New Theory of the Leisure Class* (1999(1976):62) he holds that in industrial society “work is broken down into 'occupations' and it provides livelihood and status on the individual level”, developing “in a cumulative, one-dimensional, growth sequence, by simply adding on new elements – a new factory, population growth, a new social class”; modern society (/postindustrial society) is “the coming to conscious of industrial society, the result of industrial society's turning in on itself, searching for its own strengths and weaknesses and elaborating itself” (:182). As it is seen in detail below, this generates a nostalgic mood and the search for lost authenticity.

For MacCannell (1999(1976):7), the characteristics of modernity examined by social scientists (advanced urbanization, expanded literacy, generalized health care, rationalized work arrangements, geographical and economic mobility and the emergence of the nation-state as the most important sociopolitical unit) “are merely the surface features of modernity”. The “deep structure (...) is a totalizing idea, a modern mentality that sets modern society in opposition both to its own past and to those societies of the present that are pre-modern or un(der)developed.”

In the introduction to the 1999 Edition of *The Tourist*, MacCannell sees his original 1976 work in the light of the notion of postmodernism, although distancing himself somehow from it:

If the founding claim of postmodernism is taken seriously, the social arrangements I described more than a dozen years ago passed out of existence almost exactly coincident with the original publication date of *The Tourist*. (...) Perhaps “the tourist” was really an early postmodern figure, alienated but seeking fulfilment in his own alienation. (...) But the interpretation I gave these matters is not the same as that which would eventually be provided by theorists of the postmodern condition. (xv-xviii)

Applying such notions to TW, Krysinski (1998) distinguishes between two types of travelogue (*récit de voyage*, in the French original): the modern and the postmodern. Modern travelogues present “ethnographic and scientific flavour” (my translation from the French original) and problematize the issue of the other; they contest the ideological grounds of the “enslavement” of the other and are associated with the production and legitimation of the grand

metanarratives of Humanity. On the other hand, the postmodern travelogue overcomes and nullifies modernity, proposing the final closing of the “issue of the other”.¹⁰⁹

This distinction suffers from a few problems. First, the definition of the postmodern travelogue is done by *différance* (a concept so dear to postmodernists) vis-à-vis the modern travelogue. This implies that the former is simply presented in opposition to the latter and that, consequently, has no intrinsic meaning. As a practical consequence, although it may be possible to classify a travelogue as modern in Krysincki's terms based on the presence of the issue of the undue treatment of the other, the absence of such issue would not make such text necessarily postmodern (as it could, say, be engaged in the production and legitimation of the grand metanarratives of Humanity, a trait of the modern travelogue in the framework proposed by Krysincki). Second, postcolonial studies (as detailed in 2.8, below) criticize parts of modern TW precisely because of its unacceptable treatment of the other, which means that they do not see it as problematizing a relation with it.¹¹⁰ For these reasons, the distinction will not be used as an operational concept in this work.

Empirical studies

In the area of humanities, Said's (1978) *Orientalism* (dealt with in detail below) is possibly the most ambitious empirically based work on the issue of the linear vision of History, having identified the tendency in a large corpus of eighteenth and nineteenth centuries European academic studies.¹¹¹ As seen above in subsection “The choice of Iberia”, the pair traditional / modern has also informed several social science analyses on contemporary societies. Focusing on a not so recent period, O'Connor (1993)¹¹² emphasizes the presentation of “Irish” icons such as leprechauns (legendary creatures of Irish folklore), shillelaghs (sticks originally used for settling disputes, which eventually became a symbol of stereotypical violent Irish behaviour) and shamrocks (plants that are symbols of Ireland and have magical connotations in Celtic tradition) as representative of “pre-modern society” in tourism literature in the 1950s through the early 1990s. Ireland is presented as an “empty, rural, pre-industrial landscape populated by curious,

¹⁰⁹ Examples of the modern type according to Krysincki are Claude Lévi-Strauss's *Tristes Tropiques* and Joseph Conrad's *The Heart of Darkness*, while Baudrillard's *Amérique* illustrates the postmodern type.

¹¹⁰ See for example Said's (1978) *Orientalism* in the subsection to follow.

¹¹¹ According to Featherstone's (1995), in Said's view the Orient and the Third World are presented as premodern by such works.

¹¹² Quoted in Clancy (2008).

clever (but not too clever) people left relatively untouched by modern capitalism”. Later, in a study on contemporary TW on Mongolia, Tavares (2004:43) finds that “modernity is conceptualized as being 'out of place' in the Mongolian landscape, whereas, conversely, tradition and history are seen as being 'in place”.

Possibly a unique case of an empirical sociological perspective on TW/FLO (along with Leitch (2009), presented in section 2.6), Sharp (1999) studies a contemporary gaze on “authenticity” and the opposition traditional / “traditional” versus modern / “modern” societies, dealing with written accounts of a social world and of the social relationships of the writer with that world in two books which are “arguably the most popular and commercially successful English-language TW of recent years”.¹¹³ Focusing on *A year in Provence* (1989) and *Toujours Provence* (1991), by Peter Mayle, Sharp describes the author's move from his previous life of advertising executive into provençal culture in the village of Ménerbes, rural France, and his socialization within that culture. This is a process in which he seems to search for a way of life in which “social integration dominates systemic integration”, performing the “construction of an image of community which resonates with the *Gemeinschaft* of traditional belief systems in comparison to the mediated *Gesellschaft* of Mayle’s previous life” (:202). The reader finds a countryside managed by peasants whose connections to the land go back generations and who do things by hand, fitting a notion of authenticity as opposition to mass production (see section 2.3) and also other notions in their use of “traditional clothes” and their “good, honest values” (:207).

The nature of local social relations (based on social integration, social solidarity, kinship and face-to-face interaction), in which the author and his wife become involved, is also part of this. Mayle contrasts the dominance of “natural” use values in Provence to signs of transitory (fashionable) meaning in urban culture, therefore using an essentialist concept of tradition in the sense of practices transmitted (almost) unchanged over time (this concept overlaps with its use by some social science practitioner, as above). Noting that Mayle sees fireplaces in cities as lacking the smell of wood smoke, “one of the most primitive smells in life”, and as self-consciously lit “architectural features”, Sharp claims that the British author is suggesting that what has value in Provence for what it is and what it can do has value in cities only as a result of what it can represent. In her own words, Mayle sees a threat in

¹¹³ Interestingly, Sharp is institutionally based in a Department of Geographical and Earth Sciences (at the University of Glasgow).

the intervention of the symbolic into the real working of things so that value is only obtainable through deferral of meaning to style gods in Paris or the pages of Vogue magazine. In the society constructed by Mayle, it is a sense of belonging, of shared meanings and values derived from local issues and the obligations of friendship which construct meaning, not some distant symbolic order. (:212)

Still according to Sharp, in rural France Mayle finds a lifestyle that is simple and less developed and complicated than the lifestyle he and his assumed audience have experienced in England and other urban modern societies. He and his wife are not mere voyeurs of local life, though, being almost seemingly socially integrated in it. “Locals will do things for tourists only when payment is involved, whereas the Mayles' relationship with Provence is mediated by friendship and support – locals are keen to show them things and explain ways”, in what Sharp calls the “romanticization of social integration” (:211):

The concept that they come as friends rather than individuals mediated into society by economic relationships alone is very important to Mayle – as it has been to the literature of Western travel. What this rhetorical strategy achieves is a resonance with the utopia of capitalism in which exchange is mutually beneficial and where there are no distinct or uncomfortable class divisions. This stands in stark contrast to the competition and commercial overdevelopment of both the Thatcherite society he 'escaped' and the economic relations foregrounded in mass tourism. (:210)

Mayle thus finds authenticity not only in the social world of the village of Ménerbes, but also in his relations with local inhabitants, with whom he participates in a form of capitalism without connotations of “inauthenticity” (as opposed to its “inauthentic” aspects, as seen above in the theoretical section dedicated to the issue). Still, in contrast to classical ethnographic writing, in which the themes of the vanishing primitive and the end of traditional society are pervasive (Clifford, 1986, detailed below), he doesn't see as certain the loss of local difference due to external influences. And Mayle's realistic, anti-romantic attitude towards modernization (or, more generally, social change) is also at odds with that of folklore studies, in which “the ideal folklore community, envisioned as pure and free from civilization's evils, was a metaphor for everything that was not modern.” (Bendix, 1997:7).

In Sharp's rendering of Mayle, the British author even underlines the advantages of a well managed change associated with tourism, in contrast with the postcolonial anxiety she sees in many travel writers who report with dismay the loss of authentic cultures and difference. Provence seems capable of preserving its identity, and tourists are welcome due to the money they bring in. At the same time, although Mayle's romantic anthropological perspective may to some extent feel cosmopolitanism threatening specificity of place, he recognizes that the realistic Provence inhabitants are happy with the situation: to many, tourism is an easier and more desirable way than traditional peasant life. According to Sharp, the writer even seems to think that tourism can reinforce traditional life by making small rural communities financially more viable¹¹⁴.

On the other hand, Sharp maintains that Mayle is an anthropologist in his mode of writing in his sympathy towards the inhabitants of Provence:

This mode presents Mayle as deferring to local knowledge, in contrast to earlier accounts (...) whose more colonial modes of reporting can be seen to impose an English sensibility upon that of the locals. (page 203)

However, Sharp cautions that Mayle should not be seen as post-colonial figure, his overall tone being rather paternalistic. In the vein of the post-colonial critique analysed below in this chapter, she claims that

Although he identifies himself with the natives, this is to ensure that he is not confused with the pretentious, insensitive "rural tourists" [sic] from cities. He is always clear to ensure that the reader knows his origins, knows that he is a sophisticated urbanite, that there is no way that Mayle could be as straightforward and basic as the rural folk he describes. (page 204)

Sharp therefore identifies what could be called the paradox of the ethnographer, a position in which anyone trying to build an objective account of a culture different from his own might find itself. Full participant observation and the "authentic" social relationships with natives that

¹¹⁴ Many sociologists and other academics have of course focused directly on tourism. Some concepts in this area deemed relevant for this study have already been considered in the previous chapter and is considered at an operational level in the methodology chapter.

would entail are never possible because, even if the observer does not engage in market relations with locals (and often people expect and demand to engage in such relations in order to play the role of informants¹¹⁵) her/his ultimate goal will always be to observe and later communicate observations. Unless s/he merely transcripts *everything* s/he has observed her/his own culture would be involved and authenticity in social relations destroyed as selecting would involve a culturally charged choice. More generally, as the above-mentioned reference to informants suggests, there is also an inevitable observer effect, as the mere presence of an outsider changes behaviours (although it can of course also reveal traits which otherwise would not be seen).¹¹⁶

2.5 – Humanism and cultural relativism

Quoting one of the seven theses of humanism proposed by philosopher Mario Bunge, Birx (2006) presents the anthropological thesis: the common features of Humanity are more significant than the differences, a very general view of which concrete cases can be observed in some works of TW¹¹⁷. Because of its generality this thesis is not very useful when trying to define in operating terms an axis of fundamental unity-difference within Humanity, which would be necessary to quantify the corpus as regarding such axis. To that end one has to consider Bunge's "epistemological thesis", which claims "it is possible to find out the truth about the world and ourselves with the help of experience, reason, imagination, criticism, and sceptical, open-minded inquiry" (Birx's rendering, page 1248). Birx also holds that the principal feature of humanism is not so much its core articles of belief, but the method by which inquiry into the world is undertaken, an attitude that emphasizes individual dignity, value, and self-realization

¹¹⁵ If the cultural gap is very large, other cultures might, as per Barley (1983), not even understand the role of the anthropologist, taking the person engaged in such role as a spy or lacking reason or normality (an "idiot" in Barley's amusing style). Something similar happens with travel writer Redmond O'Hanlon's (1985) *Into the Heart of Borneo*, according to Appiah (1997), quoted in Duncan and Gregory (1999).

¹¹⁶ In Physics, the observer effect is often confused with Heisenberg's uncertainty principle, but the latter regards uncertainty inherent in the properties of all wave-like systems, irrespective of the observer (as per Wikipedia).

¹¹⁷ Focusing on *The Present State of the Cape of Good Hope*, a travel book published in 1719, Pratt (2008(1992:42) writes that with "humanism not found in later writers, Kolb [the author] affirms the Hottentots [local inhabitants] above all as cultural beings. He is acutely critical of European claims that they lack the capacity for religious belief, insists they be understood by Europeans in the same terms Europeans understand themselves. Without denying the repugnance to Europeans of many Khoikhoi [another designation for the same local inhabitants] practices, he rejects paradigms of essential difference that make it "natural" for Europeans to deal with the Africans differently from the ways they deal with each other." Pratt also analyses Mungo Park's *Travels in the Interior Districts of Africa*, published in 1799, highlighting that he "often takes pains to report the Africans' reactions to him as well as his to them, and to affirm commensurability of European and African lifeways."

through reason. In turn, Borgatta and Montgomery (2000) see the “Enlightenment project”, which they also call “modernism” as

characterized by the gradual shift away from religious sensibilities and to scientific objectivity, the rational exploitation of nature for human needs, the perspectival representation of nature in art and humanistic truth in fiction, and the struggle for a humane society. Modernism was realist in its epistemology and progressive in its politics. According to it, truth could be attained – particularly with scientific advances. Beauty could be distinguished from trash. Humanism could nurture moral conduct and decent conditions of life. And history was purposive and progressive. (:2206)

In a similar vein, for Hollinger (1994) the “Enlightenment project” maintains there is an epistemological unity of all Humanity and that everything that deserves to be known may be unified in a set of beliefs all human beings can access. In this view, only a society based on science and universal values can be happy: “truth” frees and ignorance causes unhappiness. More broadly and not referring specifically to reason, Borgatta and Montgomery (2000) claim that

sociologists operating in the humanist tradition hold that the study of society begins with the premise that human beings are free to create their social world and that whatever impinges on that freedom is ultimately negative and destructive. (...) The most important question that can be asked by a humanist sociologist about human behaviour, the one originally raised by the Enlightenment philosophers [is]: How can social science help to fashion a humane society in which freedom can best be realized?” (page 1246)

Referring to the section on authenticity, above, one can conclude that this might see social structure as an obstacle to an authentic self. And within this context a specific case can be considered where social structure is that of a traditional society, with its set traditional norms and practices which are by definition not given to criticism, therefore not available to inspection by reason, which renders humanism not possible in traditional society.

In general terms, reason is therefore seen by humanists as something that can be exercised to critically look at ways of doing. Specifically, “humanists have always rejected static formulas of thought, bowing to arguments from authority or accepting command moralities” (Birx, 2006:1250). In this, humanism can be seen as opposed to cultural relativism, which Franz Boas

(1896)¹¹⁸ defined for the first time in “The Limitations of the Comparative Method of Anthropology” claiming that there are no inferior or superior cultures and that all premises of good and bad and/or upper and lower are culture-bound and ethnocentric, which means that no critical assessment of a culture can be performed by way of reason. According to him, one of the four major limitations of the comparative method, from which cultural relativism stemmed as a critique, is that it is impossible to account for similarity in all types of culture by claiming that they are alike because of the unity of the human mind.¹¹⁹

Still today, the **official anthropological doctrine** holds, according to Rosaldo (1989), that each human culture his unique in such a way that it is not possible to compare it with other cultures; no culture is inferior or less rich and no people has a more or less complex culture; given every human behaviour is culturally mediated, the different ways of organizing and perceiving reality are culture-specific and not common to the human gender¹²⁰. More specifically, in Featherstone's (1995:136) rendering of the doctrine, “tribes possess distinctive cultures that form a unique complex which needs to be interpreted in their own terms”, while in the more recent definition of Birx, echoing opposition to ethnocentrism rather than to humanism (2006:631):

Cultural relativism is the idea that beliefs are affected by and best understood within the context of culture. It is a theory and a tool used by anthropologists and social scientists for recognizing the natural tendency to judge other cultures in comparison to their own and for adequately collecting and analysing information about other cultures, without this bias. Cultural relativism – also sometimes called “pluralism” – cautions against unfairly condemning another group for being different and instead respects the right for others to have different values, conduct, and ways of life. Cultural relativism approaches awareness of cultural differences as a tool for appreciating and analysing other cultures without assuming one’s own group to be superior.

Anthropologist Ernest Gellner (1970)¹²¹ warns that in interpreting exotic concepts and beliefs within a social context, contemporary anthropologists ensure that apparently absurd or

¹¹⁸ Quoted in Green (1998:158).

¹¹⁹ This rendering of Boas' article is taken from Glazer (1994).

¹²⁰ Note the contrast with the above-mentioned Bunge's “anthropological thesis”, which in fact is for the author one of the theses of humanism.

¹²¹ Quoted in Asad (1986).

incoherent assertions are always given an acceptable meaning, and that while the contextual method of interpretation is in principle valid, the “excessive charity” that usually accompanies it is not. From this critique Gellner only extracts epistemological consequences (apparently absurd or incoherent assertions are given acceptable meaning), not moral ones (which would be the possibility of classifying a given social practice as unacceptable by means of a humanistic grounding)¹²². He seems, though, to be on the side of Humanism as supporting a method of enquiry based on reason which allows the identification of “absurd or 'pre-logical' doctrines” (Gellner, 1970:33).

More generally, and although apparently not assuming a position regarding the existence or not of a universal reason or a fundamental cultural unity as regards Humanity, the postcolonial critics (whose methods of analysis of written texts are detailed in a subsequent section of this chapter) point out the insensitivity of Western colonialists and travellers vis-à-vis the differences of the colonial world or the assumption of some differences as essential. This can be seen in Pratt (2008(1992:152) who refers to the

language of the civilizing mission, with which North Europeans produce other peoples (for themselves) as 'natives', reductive, incomplete beings suffering from the inability to have become what Europeans already are, or to have made themselves into what Europeans intend them to be.

It is also present in Said's (1978) classic view of eighteenth and nineteenth centuries' orientalist studies. According to Blunt (1994:25)¹²³:

Orientalism relates to the production and reproduction of the myths and imagined geographies constructing the inferiority of other people and places. This in turn reinforced and legitimated perceptions of Western superiority, so that the self is defined through its construction of an 'Other'.

¹²² On the moral ground, it would seem that radical cultural relativism, by absolutely denying any possibility of identifying any “disfunctioning” in society (which would be translated into propositions of the type: “such social of cultural practice is not acceptable”) would also have a radical implication for social science as a whole. The implication would be denying the possibility that a social scientist could see “disfunctioning” in her / his own society, because every society or culture (including therefore her / his own society and culture) would have, in the radical cultural relativistic view, its own valid way of organizing itself. As such, this argument would reduce sociology to merely trying to establish facts rather than proposing solutions to solve social problems such as crime, poverty, drug addiction, amongst other.

¹²³ Quoted in Tavares (2004).

The pair humanism / cultural relativism has also ethical consequences for the standing of the tourist and the traveller. Cohen (1988:371-386) posits that if modern man is seen as “adhering to a central nexus of 'Western values', his prevailing mode of travel is recreational and he can be criticized for his narrow 'parochialism', his lack of readiness to relate to the values of other except in a superficial, casual manner”. The connection between such adherence and the mode of travel can be contentious, but what is important for what is at stake in this section is that if “Western values” refer, as they usually do, to such things as democracy, human rights (e.g. as defined by the United Nation's Universal Declaration) and, broadly, rationality, they are associated with humanism. On the other hand, the reference to the criticism of travelling in such a way can be subsumed in the cultural relativistic critique of humanism as incapable of dealing with cultural difference.¹²⁴

The distinction is put into practice in an empirical study by Lutz and Collins (1993), two anthropologists who look in the photographs of *National Geographic* magazine for the presence of humanistic principles that defend universal equality across ethnic, class, gender, language, and politics borders or, on the other side, a “progressist” humanism which seeks to “historicize” the differences that separate human beings. Taking the term “historicize” as meaning “considering (in) historical context”, this latter attitude becomes akin to cultural relativism.

In its opposition to the faith of humanism in reason and a single “truth”, cultural relativism, although arising in a different historical moment, concurs in some aspects with postmodernism, in as much the latter as it is defined by Borgatta and Montgomery (2000), echoing Lyotard, as the sensibility that arises when the credibility the “master narratives” (above referred in their definition of modernism) is questioned¹²⁵. This is reinforced by Birx's (2006:1914) definition of (the “Anglo-American strand” of) postmodernism:

¹²⁴ Echoing MacCannell (1999 (1976)), the major proponent of the tourist's search for authenticity as a crucial symptom of modern life (as is seen below in detail in this same chapter), the other mode of travel considered by Cohen conceives modern man as alienated, whose “prevailing mode of travel is diversionary; tourism is then criticized primarily as a symptom of the general malaise of modern society”. Here, the duality humanism / cultural relativism does not seem to be active: although the umbrella “modern” may be somehow a humanist unifier, claiming that at least a set of cultures / societies share some attributes (which include rationality as defined above in section “Traditional Society and Modern Society”), the critique of such modernity is not made from the standpoint of cultural relativism (although such critique could of course claim that the general malaise of modern society stems from the emphasis on rationality in the form of mostly mechanical social relations).

¹²⁵ These master narratives are: truth can be attained, particularly with scientific advances; beauty can be distinguished from trash; humanism can nurture moral conduct and decent conditions of life; History is purposive and progressive.

The central claim of postmodernists [...] is that rationality is a historically conditioned faculty, which means that different historical epochs will produce different notions of rationality.

Thus, if it varies with time, rationality can be seen as varying also with space. Moving away from humanism, one might end-up in a position of cultural relativism if, abandoning the notion of a *universal* rationality, one allows for the existence of different rationalities within the same epoch. Wishing to avoid the term rationality, one could replace it with different ways of generating individual and collective views and ways of organizing the physical and social world in a manner that has consistency in time, reaching therefore the concept of culture, or more precisely in this case, cultures¹²⁶.

Ultimately, besides opposing cultural relativism, humanism could also be seen as a modern, critical attitude defined in opposition to the premodern, traditional world and its views (as per definitions of traditional society and modern society seen above). Paradoxically, the view of classic anthropology that there are no inferior or superior cultures developed within modernity and, at the same time can be seen as a particular case of the postmodernist attitude where any discourse (and, by extension, any cultural practice or culture) is as justified as any other.

2.6 – Types of movement and gaze in(to) otherness: motivations and symptoms

Tourism is important for this investigation given that TW, which has been hardly studied from social science points of view, shares the element travel with tourism and can up to some point be considered a mediated form of tourism or at least a mediated form of travel in which someone tours or travels by reading. Much of the discussion within social science regarding the definition and description of tourism revolves around the concept of authenticity – its main proponent being MacCannell (1999(1976)) – and frequently includes the concepts of traditional society and modern society. On the other hand, Urry (2002(1990)) has made a set of theoretical propositions aiming at categorizing people who move temporally to a different physical and/or cultural location with the general purpose of attaining epistemological, aesthetical and/or

¹²⁶ The idea of time-consistency is of course inherent to the concept of culture as structure (that is, something with some degree of permanence) and to the notion of traditional society, which is in great part, as seen above in the corresponding section, characterized by absence of low level of change, as opposed to modern society within which modernism arose and contributed to create.

pleasurable contact with such location (as opposed, say, to business trips, which purpose is not related to the location *per se*). They could be summarized as distinguishing the figure of the tourist – and, mostly, the tourist gaze – from the everyday life roles and gazes, in which work is predominant. Within such set of views, to which other important authors such as Cohen (2004) should be added, the tourist is then contrasted with other figures, such as the traveller, the explorer and the post-tourist (as detailed below).

Tourist's search for authenticity

Boorstin (1964) is possibly the first analysis of tourism within social science. He argues that tourists want superficial, artificial experiences (the so-called “pseudo-events”), as opposing the traveller, who

was working at something; the tourist was a pleasure-seeker. The traveller was active; he went strenuously in search of people, of adventure, of experience. The tourist is passive; he expects interesting things to happen to him. He goes “sight-seeing”.... He expects everything to be done to him and for him.¹²⁷

MacCannell (1999(1976))¹²⁸, one of the most influential sociological perspectives on tourism, criticises this by postulating that what tourists demand is authenticity. For him, sightseeing is an attempt to overcome “the discontinuity of modernity, of incorporating its fragments into unified experience”¹²⁹:

Modern Man is losing his attachments to the work bench, the neighbourhood, the town, the family, which he once called 'his own' but, at the same time, he is developing an interest in the “real life” of others” (page 91)

¹²⁷ Quoted in MacCannell (1999 (1976)).

¹²⁸ His influential article “Staged Authenticity: Arrangements of Social Space in Tourist Settings”, published in 1973 in the *American Journal of Sociology* is included in MacCannell (1999 (1976)), so this latter is the only reference included in this study.

¹²⁹ This argument echoes Simmel (1950), quoted in Cresswell (2006), who held that modern, urban life entails sensory overload, in contrast with traditional, rural life, (slow and habitual). The modern urbanity, and especially the development of a money economy and clock time, meant that people were bombarded with sensations that led to an increasingly abstracted sense of self and society.

For MacCannell, then, tourism is an industry that supplies meaning to life and a general social structure, as did religion in pre-industrial societies, in a context where everyday life threatens the solidarity of modernity by atomizing individuals and families into isolated local groupings which are not functionally or ideologically interrelated. Hence, he speaks of a mentality that sets modern society in opposition to its own past and to those societies of the present that are premodern or un(der)developed:

For moderns, reality and authenticity are thought to be elsewhere: in other historical periods and other cultures, in purer, simpler life-styles. In other words, the concern of moderns for “naturalness,” their nostalgia and their search for authenticity are not merely casual and somewhat decadent, though harmless, attachments to the souvenirs of destroyed cultures and dead epochs. They are also components of the conquering spirit of modernity – the grounds of its unifying consciousness. (page 3)

MacCannell is subject to the criticism that his “moderns” may be ubiquitous but they are not universalizable on a global scale (Kaplan, 1996). Moreover, his intention to perform an “ethnography of modernity” faces the difficulty that the majority of tourists visit countries undoubtedly modern or at least not premodern¹³⁰. Interestingly, MacCannell performs his empirical researches mostly within modernity, not in the places where moderns (in the form of tourists) would be supposed to go while escaping modernity¹³¹. It could be counterargued here that such majority is searching for pockets of premodernity within modernity, which would partially contain the criticism, but what to say of the fact that some of the most visited cities of the world are clearly some of the most modern¹³²?

¹³⁰ For example, Borgatta and Montgomery (2000) quote World Tourism Organization data showing that in 1996 industrialized countries received 55.8% of global tourists, with developing countries receiving 31.0% and central and Eastern Europe receiving 13.2%. Even allowing for the effects of distance and the degree of easiness in crossing borders (such as Europe's borderless Schengen Area that facilitates intra-European tourism) along the possibility that some “tourists” might be disguised economics migrants, these figures do not accommodate well MacCannell's theory.

¹³¹ “My travels in the course of gathering observations for the book were restricted to an area of the earth extending along the Pacific coast of North America: from Vancouver, British Columbia, in Canada to Baja California [in Mexico], then across the United States and Western and Eastern Europe to Istanbul. After I finished *The Tourist*, I was able to visit Mexico, Africa, and Asia. Nothing that I found in my subsequent travels has caused me to want to change the overall thesis of the book.” (page xxiv)

¹³² According to Wikipedia, the ten most visited cities by estimated number of international visitors include Paris, London, New York City, Singapore, Kuala Lumpur, Hong Kong. While in the first two one may find monuments that predate modernity, this is much less the case in the remaining ones.

Elsewhere in his above-mentioned *The Tourist – A new theory of the leisure class* (1999(1976)) MacCannell seems to extend the search for authenticity from “other historical periods and other cultures, in purer, simpler life-styles” (page 3) to include modernity itself as object of tourist attention:

Pretension and tackiness generate the belief that somewhere, only not right here, not right now, perhaps just over there someplace, in another country, in another life-style, in another social class, perhaps, there is genuine society. The United States makes the rest of the world seem authentic; California makes the rest of the United States seem authentic. (...) These concerns conserve a solidarity at the level of the total society, a collective agreement that reality and truth exist somewhere in society, and that we ought to be trying to find them and refine them.¹³³ (:155)

The inclusion of modernity as destination would save MacCannell from contradiction with the empirical data on tourist destinations, but the excerpt does not seem fully clear in this respect and the tourist would still be visiting modern countries to escape modernity.

Ambiguity is also present when he adds that “the worker is integrated into modern society as tourist and as tourist attraction (the display of the world of work), as actor and spectator in the ‘universal drama of work’”¹³⁴ (:63) – is this (also) performed within sameness? If so, MacCannell is noting *avant la lettre* the importance of reflexivity, a characteristic of modernity or of its later phase (Beck, 1992; Giddens, 1991; and Lash, 1990, as mentioned in section 2.4). At the same time, he seems to be speaking of de-differentiation, a notion later used by others to define postmodernity (see also section 2.4)¹³⁵. For Urry (2002(1990):97)

this fascination with other people's work is bound up with the postmodern breaking-down of boundaries, particularly between the front- and the back-stage of people's lives. Such a development is also part of (...) a postmodern museum culture in which almost anything can become an object of curiosity for visitors.

¹³³ This exercise of permanent *differanciación* – authenticity is always elsewhere – that MacCannell ascribes to the tourist seems in the end to echo much the will to be in another/different place/culture, just mentioned as one of the motivations of tourism.

¹³⁴ According to MacCannell this translates, amongst other things, into tours to society's “back regions” (as per Goffman, 1959), such as factories, coalmines, fire-stations, farms, stock exchanges, bank vaults, ghettos and so forth.

¹³⁵ Rojek (1999:194), who has written together with Urry (Rojek and Urry (1997)), speaks of the “tendency of modernity to undercut the divisions and dissolve the boundaries which initiated”, not being clear if this de-differentiation is intrinsic to modernity or to a later phase.

But MacCannell's wants to take this perspective even farther, attributing to the quest for a genuine social setting a wider significance as touching on the essence of the social:

The expansion of alternative realities makes the dialectics of authenticity the key to the development of the modern world. The question of authenticity transcends and subsumes the old divisions of man vs. society, normal vs. deviant, worker vs. owner [and] social class distinctions are blurred by the universal quest for the authentic experience. (page 145)

Cohen (1988a:38) quotes the work of Victor Turner (1973, 1974, 1978) as making a third major contribution (albeit an indirect one) to the qualitative sociology of tourism, adding to those of Boorstin and MacCannell. According to Cohen, Turner's notion of rite of passage (originally developed by van Gennep (1960(1908))), involves the separation both spatial and social of the individual into a stage in which he experiences "communitas", an intensive bond with the group undergoing the ritual and the fundamental symbols of his culture, and also the "sacred, invisible, supernatural order" (Turner, 1973: 214). This is followed by reintegration into the individual's social group, usually in new roles and at a higher social status.

Turner applied the notion of rite of passage to the analysis of pilgrimage, conceiving the pilgrim as leaving his ordinary daily surroundings and departing on a journey to the "Center Out There" (Turner, 1973), in which there a movement in space from the familiar to the unfamiliar and a spiritual ascent. In Cohen's reading, "in its otherness the Center [Out There] expresses those general human values which the differentiations of everyday life tend to repress: spontaneity, personal wholeness, and social togetherness, embodied in Turner's concept of 'communitas'". Here Cohen sees the proposition of a tourist seeking freedom from social structure – considering it the core of Turner's (indirect) contribution to the study of tourism – and finds it empirically supported in a study of Swedish mass tourists in a Gambian beach resort by Wagner (1977). Also in the "Turnerian tradition", the Walt Disney World, "generally dismissed as perhaps the most contrived of staged tourist attractions", notes Cohen (1988a:40), "evokes the supernatural in a [modern] context within which the supernatural has been banished" (Moore, 1980: 215) and thus makes accessible experiences which are otherwise barred to secularized moderns.

In Cohen's interpretation of Turner, then, MacCannell's touristic escape from modernity is specifically an escape from social structure. Although such urge needs not be a modern one (as it can be conceived as applying, say, to premodern society) the fact that modernity is secularized (a contentious claim, as argued in footnote 100 on page 55) makes it a specific escape from modernity in search for the sacred (differently to MacCannell's proposed quest for authenticity as a replacement for the sacred). This is at the basis of Cohen's (2004) "phenomenology of tourist experiences", presented below¹³⁶.

Further motives in tourism

Irrespective of whether his argument is denied by the fact that tourist visit overwhelmingly modern places or whether he is being overambitious in the modern tourist attitude he identifies, MacCannell seems at least to be missing obvious basic motives of tourism: to be elsewhere and see things which one has not seen (even if the gap is not as deep as, say, between traditional and modern society) or just to have pleasurable sensorial experiences¹³⁷, a critique which also applies to the above-mentioned Cohen's escape from social structure and drive for the sacred.

The difference/novelty motif is supported by McKean (1977), who holds that for some types of tourists, tourism is simply seen as a shared human desire to know "others". Cohen (2004:75) recognizes that the tourist may travel within his own society but claims that

one of the distinguishing characteristics of modern tourism (...) is the generalized interest in the environment, and the desire for experience far beyond the limits of the traveller's own cultural realm; indeed, it is often the strangeness and novelty of other landscapes, lifeways and cultures which attract the tourist."

¹³⁶ The typology is presented in a chapter in Cohen (2004) with the same title and was firstly presented in 1979 as "A phenomenology of tourist experiences" in *Sociology*, v13, n2, pages 179-201, being also outlined in Cohen (1988a). Henceforth only the 2004 reference is used.

¹³⁷ Antalya, in Turkey, the 4th most visited city in the world in 2010 is, despite its sights, mostly a seaside resort (it should be considered that its place in rank may in part be due to tourists flying into the city's airport and spending time in the surrounding area). Source: "Number of Arriving-Departing Foreigners and Citizens". *Tourism Statistics*. Ministry of Culture and Tourism (Turkey). 2011. <http://www.kultur.gov.tr/EN/dosya/2-5879/h/december2011bulletin.xls>. Retrieved 7 March 2012, quoted in Wikipedia.

Detailing the issue of authenticity – “intellectuals and more alienated individuals engage in a more serious quest for authenticity than most rank-and-file members of society” (1988:106) – Cohen (2004) proposes a wider phenomenology of tourist experiences focusing on tourists' perceptions¹³⁸. In such framework, and in accordance with some of MacCannell critics just mentioned, the first mode is actually not looking for authenticity: recreational tourism is performed by visitors who perceive their daily life as meaningful and travel to engage in activities akin to other forms of entertainment. The diversionary tourist sees travel as “a mere escape from the boredom and meaninglessness of routine, everyday existence” (2004:72) and contrary to the recreational mode of tourism, does not re-establish adherence to a meaningful centre upon return.

Also not adhering anymore to “the spiritual centre of their own society”, the experiential tourists look for meaning in other cultures through an “essentially aesthetic mode of apprehension of the authentic life of others” (here Cohen is quoting MacCannell, 1973), refusing however to commit themselves to it, constantly sampling and comparing cultures. It is the existential tourist who searches and finds authenticity in a centre which was not its original (Western) centre¹³⁹. Cohen concurs with MacCannell not only in the role (albeit partial) of authenticity in tourism, but also in that it sees authenticity as “an eminently modern value (...), whose emergence is closely related to the impact of modernity upon the unity of social existence” in a situation in which “the opposition between self and society has (...) reached its maximum” (Cohen, 2004:103). Similarly, but empirically based, Plog (1973)¹⁴⁰ concluded on a survey on inhabitants of New York that a continuum exists between “psycho-centered, expectant subjects preoccupied with the small daily problems and escaping to adventures”, on one extreme, and, on the other, subjects who are “allocentered, confident in themselves, curious, and adventurous”.

¹³⁸ Formerly, Cohen (1973), quoted in Huggan (2001), distinguished four touristic roles: organised tourists; individual “mass tourists”; the “explorer” and the “drifter”, the latter being more likely to make their own arrangements, to need less money, and to take more risks, while “mass tourists” are largely content to remain within a protective infrastructure.

¹³⁹ Cohen (2004:75) recognizes that the tourist may travel within his own society but, as mentioned above the claims that “one of the distinguishing characteristics of modern tourism (...) is the generalized interest in the environment, and the desire for experience far beyond the limits of the traveller’s own cultural realm; indeed, it is often the strangeness and novelty of other landscapes, lifeways and cultures which attract the tourist.”

¹⁴⁰ Quoted in Borgatta and Montgomery (2000).

People also travel frequently just in search of pleasurable experiences for the body, as in the beach resort. Veijola and Jokinen (1994)¹⁴¹ hold that that holiday experiences are said to be physical or corporeal and are not merely visual and for Errington (1998:126) “the first tourists to a remote area are those most desirous of the authentic and unspoiled. (...) these travellers are more enamored of the authentic than are the people who take cruises to luxury hotels once tourism is well established”, which presupposes different purposes. Further, for Hennig (1999:53-9, 94-101)¹⁴², the motivation to travel is in many cases not a genuine experience of foreign lands and their histories but the realisation of pre-conceived dreams and desires (a notion which is analogous to that of the tourist as a semiotician looking for preconceived signs, as detailed below).

Tourism involves as well a less existential motivations such as the desire for status, associated with conspicuous consumption or the freedom of anonymity (not only personal, but also cultural, that is, the expectation of more tolerance for being foreigner and not knowing local rules, and the absence or dilution of one's own cultural norms because the people embodying them are not present). For Fussell (1980:246)¹⁴³ (interestingly a non-sociologist), what distinguishes the tourist

is the motives (...): to raise social status at home and to allay social anxiety; to realize secret fantasies of erotic freedom; and, most important, to derive secret pleasure from posing momentarily as a member of a social class superior to one's own, to play a role of a ‘shopper’ and a spender whose life becomes significant and exciting only when one is exercising power by choosing what to buy.

It should also be noted, against MacCannell (1999(1976)), that for some people there is no need to escape an “inauthentic” modernity (Nash, 1996)¹⁴⁴ and tourists are not a heterogeneous group. Disbanding the notion of a single type of tourist, Roberson (2001) resorts to typical sociological variables to highlight, albeit rather vaguely, that

relations to place, power, and identity, often based on racial, class, and ethnic backgrounds, make up part of the baggage that the traveller carries. Likewise, women tend to experience travel and mobility

¹⁴¹ Quoted in Urry (1990(2002):145).

¹⁴² Quoted in Holtorf (2006).

¹⁴³ Quoted in Culler (1990).

¹⁴⁴ Quoted in Burns (1999).

differently than do men, in large part because of women's traditional ties to home, family, and domesticity, and because of their sexual vulnerability and objectification at the hands of men. (page xiv)

A category not yet considered includes the people who visit societies other than their own (or who even take a leisurely look at their own) displaying an ironic distancing towards (the search for) authenticity. For Urry (2002(1990):91), the post-tourist is aware of her/his condition of tourist and knows that "tourism is a series of games with multiple texts and no single, authentic tourist experience." Not believing in the corporeal travel's promise of transcending "mediation processes, or short-circuit representational imagery, through *actual* arrival at the desired scene" (Noy, 2009:219), he can afford even not to move. According to Urry (2002(1990))

the post-tourist does not have to leave his or her house in order to *see* many of the typical objects of the tourist gaze: with TV, video and the internet all sorts of places can be gazed upon, compared, contextualized and gazed upon again. (page 90)

Ritzer and Liska (1997)¹⁴⁵ talk of an extreme subtype of the post-tourist – the postmodern tourist – who not only is indifferent to the markers of authenticity and can even seek and celebrate (explicitly) inauthentic attractions, although one should be careful in seeing this figure as an ideal type or as corresponding to a small number of actual individuals (mostly sociologists and anthropologists?), as it may be hard to imagine a motivation to move based solely on the search of this meta-gaze. Seemingly going back to Boorstin (1964), Ritzer and Liska (1997) even argue that

in contrast to MacCannell (...) many tourists today are in search of inauthenticity. The enormous popularity of the tourist destinations focused on in this essay – Disney World, Las Vegas, cruises, shopping malls and fast-food restaurants – all speak to the relentless search for inauthenticity. (page 154)

Authenticity versus tourism and in the absence of tourism

¹⁴⁵ Quoted in Noy (2009).

MacCannell (1999(1976):101) recognizes the difficulty in knowing for sure if the tourist experience is in fact authentic by proposing the concept of staged authenticity, holding that “it is always possible that what is taken to be entry into a back region is really entry into a front region that has been totally set up in advance for tourist visitation.”¹⁴⁶ This does not mean that he refuses an essential nature to authenticity, as tourists “often do see routine aspects of life as it is really lived in the places they visit” (231); he rather sees a graduation from front stage to back stage, including fronts arranged to appear like backs, backs that are open to the public (or the tourists) and backs that are built to be acceptable for tourists (105).

According to Garner and Hancock's (2009:105) reading of Goffman, backstage has the connotation of informality, being the place where people can act as themselves (against the front stage, where people act according to the norms of society). They point out, however, that backstage has its own scripts and roles, and see Goffman's proposal as a “hall of mirrors” where each backstage is also a front stage (:107). (In Goffman's (1956) own example of a restaurant, the kitchen is the backstage, but arguably even there each person faces an audience watching his performance). It seems, then, that the existence of a **backstage** would depend, then, on the definition of **relevant audience**, the former varying according to whether the latter is taken as significant other(s), primary group(s), secondary group(s) or wider groups (and it should not be forgotten that many of the norms of society are effective even when the individual does not feel s/he is being observed).

In the realm of tourism there is a specificity which helps to solve this complexity: the relation between locals and tourists is clear, as tourists have a status of wider group from the point of view of locals (and social norms of tourists do not constrain locals when tourists are not observing, given that by definition of wider group such norms have not be interiorized by locals to be effective in the absence of tourists). It can be concluded, then, that tourists motivate the creation of a front stage by locals interested in establishing market relations with such audience by staging their culture or by providing products/services (in this latter case fitting both metaphorically and literally Goffman's example of the restaurant, the kitchen corresponding to a back office or a logistics area where products/services are prepared).

¹⁴⁶ His analysis stems from Goffman (1959:115) (among others) for whom backstage is where “the performer can relax; he can drop his front (...) and step out of character”.

On the other hand, assuming that otherwise locals would behave differently, a backstage, or authenticity *à la* MacCannell, exists when such audience has no influence. Of course almost no culture has been immune to some degree of hybridization (as seen above with Bendix, 1997) and in this sense there would be no “authentic” cultures with an “authentic” backstage, but it seems fair to say that the change implied by significant numbers of tourists as sources of revenue makes the behaviour of locals less authentic, if one takes authentic as meaning sets of values held and behaviours enacted before or in the absence of the influence of (mass) tourism.¹⁴⁷

Greenwood (1989(1977)) both discusses theoretically and puts into practice this notion of authenticity. He begins by rendering Geertz's concept of culture as one which “emphasizes the authenticity and the moral tone it imparts to life experiences” (:173), seemingly proceeding with his own reasoning:

By implication, anything that falsifies, disorganizes, or challenges the participants’ belief in the authenticity of their culture threatens it with collapse. Public rituals can be viewed as dramatic enactments, commentaries on, and summations of the meanings basic to a particular culture. They serve to reaffirm, further develop, and elaborate those aspects of reality that hold a particular group of people together in a common culture. (:173)

Based on this Greenwood (1989(1977)) sees the commoditization of local culture by the tourism industry – the sale of “culture by the pound” which gives title to his work – as fundamentally destructive. Regarding the Spanish town of Fuenterrabia he has studied, he concludes that

The “local color” used to attract tourists (...) came to include a major ritual that the people had performed for themselves. Its meaning depended on their understanding of the whole system of beliefs reaffirmed by it through dramatic reenactment and commentary. It was not a performance for pay, but an

¹⁴⁷ Obviously, tourism is not the only external influence capable of generating change in a society. Besides mass media, one can think, for example, of infrastructure building, the extraction of natural resources or the implementation of production facilities by foreign firms which might consume natural and human resources (in this latter case by providing jobs). Tourism is demonized by many of its observers possibly because it directly consumes culture – relative to which such observers seem more sensitive than to the consumption of other types of resources, despite the fact that culture is a good for which rivalry in consumption is less intense than in other goods. Of course, the concern of those who warn against tourism in such a way is that albeit the *quantity* of culture may not change or may even increase stimulated by tourist demand (to maintain the economic terminology), its *quality* may be changed relative to pre-tourism circumstances.

affirmation of their belief in their own culture. It was Fuenterrabia commenting on itself for its own purposes. (:178)

The decision of the municipal government to make an official tourist event of the ritual, he concludes, ended by “definitively destroying its authenticity and its power for the people”, who “reacted with consternation and then with indifference”, adding that the “increasing maldistribution of wealth and resultant social stratification are widespread results of touristic development.” (:179)

Abstracting from what could be viewed as a romanticised, possibly even patronizing view of the society and individuals being visited by tourists, one could see, beyond the change in the nature of cultural brought about visitors, people negotiating the constraints of material want and following opportunities of material advancement. As Bendix (1997:8) notes somehow ironically, “individuals all over the globe have been sufficiently savvy to alienate themselves far enough from their traditions to market them”.

Further, there is the possibility that the tourist revenue can somehow contribute to preserve (part of) local culture from transformation, as maintained by Cohen (1998), noting possible benefits of the commoditization of culture for tourists. Also, in the collective work¹⁴⁸ in which Greenwood's text is included, McKean (1989(1977)) presented an ethnographic work on Bali which, albeit pointing to the dangers of tourism (misuse of scarce resources, increased social stratification or environmental and ritual erosion), claimed that it may strengthen the process of conserving, reforming, and recreating certain traditions. Later, Nash and Smith (1991:12-25) saw Greenwood's analysis as “fairly representative of the early anthropological viewpoint. But further research into the subject revealed that such a one-sided conclusion was unwarranted”. They note that Greenwood made a reassessment of tourism-induced changes in the Basque community he had studied before, recognizing the constructive aspect of such changes. Smith and Nash also highlight that, in fact, most of the authors who were asked to reconsider their earlier work for the revised edition of *Hosts and Guests* (Smith (1989 (1977))), appear to have reached a more balanced view of the impact of tourism.

¹⁴⁸ This is the seminal *Hosts and Guests* (Smith, 1977).

Based on empirical research on the presentation of Maori culture in New Zealand, Taylor (2001:7-26) tries to present the relation between hosts and guests as acceptable for both sides, by identifying a replacement of “authenticity” by “sincerity”.

“[sincerity] offers the basis for a shift in moral perspective: away from that which would locate touristic value in the successful re-production of 'objective truths' towards a view of tourism as embodying communicative events involving values important both to the social actors involved, and in themselves.”

In his “sincere” cultural experiences, “tourists and 'actors' are encouraged to 'meet half way”, allowing for “the communication of more localized identities”, as opposed to “solely playing on authenticity, with its attendant essentialization of Maori as a mythological pre-contact society”. His definition of the sincerity seems, however, too vague to establish whether a given situation can be deemed fair:

Cohen (2007)¹⁴⁹ compiles a typology which encompasses both Taylor's notion of sincerity and the varied perspectives on tourism which consider the existence (at least in a *a priori* situation) of an “authentic” culture, which is prone to be later eliminated, changed or even reinforced by mass visits. He sees authenticity as 1) customary practice or long usage; 2) genuineness in the sense of an “unaltered product”; 3) sincerity in relationships; 4) creativity with special relevance to cultural performances including dance and music; and 5) the flow of life in the sense that there is no interference with the setting by the tourism industry or other managers.

In as much as customary practice or long usage presupposes the absence of the interference of the tourism industry, 5) can be conflated with 1) and seen as a “pure” tradition or traditional society (as seen above in the section on traditional society and modern society). Cohen himself holds his definition 5) of authenticity correlates well with MacCannell's (1999(1976))¹⁵⁰, but he complexifies it by opposing the possibility of universal cultural annihilation by tourism, proposing the notion of “**emergent authenticity**” (1988), a socially constructed notion that over time attains authentic meaning for both the host culture and tourists, much in the same way as Hobsbawm's (1992(1983)) invented traditions need time to become traditions seen as

¹⁴⁹ Quoted in Hillman (2007).

¹⁵⁰ It could be the case that with 1) Cohen intends to render the or a point of view of tourists. If that is the case, the conflation could not be performed, because 5) seems to refer to the objective absence of the tourism industry (it cannot be the viewpoint of tourists – if any, of other kind of visitors – as the presence a tourist at a location presupposes arrangements to cater for her or him). It seems, though, that the list would be inconsistent if it included both constructed and objective notions of authenticity.

“genuine”.¹⁵¹ One of the examples Cohen provides for this are American Disneylands, who “have become a vital component of American culture”, in sharp contrast with Boorstin (1964), for whom Disneylands are locations for pseudo-events (or at least were at the time he was writing).

Considering all these views on the (im)possibility of the authenticity of social worlds in the face of tourism, does the fact tourists may not be able to reach authenticity and be limited to “pseudo-events” (Boorstin, 1964) or “staged authenticity” (MacCannell (1973, (1999(1976) (which in the long run may become “genuine” cultural elements or at least be touched with “emergent authenticity”, as seen above) implies the impossibility of “authentic social life” *tout court?*¹⁵²

The answer is several fold. It should be noted first that the concept of authenticity excludes most activities of individuals of a given culture that imply market relations with tourists, which is problematic as it involves singling out such group against other outside individuals/groups who have related in such a way with cultures throughout history (such as merchants). It is rather the volume of outsiders (who not need be solely tourists, but can be migrants, as for example it has been happening in the Chinese regions of Tibet and Xinjiang) and the magnitude of its transformative effects in a local culture that might make it “inauthentic”. Perhaps, then, the terms to use should not be “inauthentic” or “inauthenticity” but “**transformed**” and similar, in order to avoid a more moralistic and patronizing view that cultures need to be saved and that the individuals which enact them cannot choose to engage in market relations with outsiders *even at the expense of a complete transformation of their way of life* (this will be elaborated on section 5.6). In the extreme case of mass tourism “total annihilation” may take place, while on the other extreme, a single merchant or ethnographer might study a premodern society without change it significantly.

In a later text, MacCannell (1992:286) accepts that the supposedly uneven relation between the tourist and the native is somewhat mitigated in some cases by the arising of the figure of the “**ex-primitive**”, part of “formerly primitive peoples who adapt to modern existence by acting-primitive-for-others” through staging their particular cultures in institutionalized settings (a clear reference to his original concept of “staged authenticity” (1976 (1973)). The process allows

¹⁵¹ As seen above in note 69 (page 38) Hobsbawm has been criticized for distinguishing between “genuine” and “invented”. In the same note it is argued that the distinction is nonetheless valid.

¹⁵² Defined, as seen above in section 2.4, basically as premodern, non reflexive culture.

primitives “to adapt and co-exist, to earn a living just by 'being themselves', permitting them to avoid the kind of work in factories or as agricultural labourers that changes their lives forever.” (MacCannell (1992:19)).

Even this vision is tainted, however, with nostalgia for loss and repulsion for transformation and market relations:

the alleged *combination* of modern and primitive elements [“rational planning and economic calculation with primitive costumes, weapons, music, ritual objects and practices that once existed beyond the reach of economic rationality”] is an abuse of the dead to promote the pretence of complexity as a cover for some rather simple-minded dealings based mainly on principles of accounting”. (:19)

He also writes that “on witnessing these displays and performances, one cannot escape a feeling of melancholia; the primitive does not really appear in these enactments” (page 19); this prompts Taylor's (2001:7-26) criticism that in his argument MacCannell fails to recognize is its own implicit engagement in the politics of other people's identity and that identities important to the so-called “performers” are articulated in the contact with tourists, maintaining that “if the concept of authenticity is to have any legitimate place in discussions of culture, its designation must rest with the individuals who ‘make up’ that culture.”

With the exception of such nostalgic view, and limiting oneself to the cultural dimension, it would seem that at the least in a short run perspective – as opposed to a long run where a(t least a non-traditional) culture inevitably changes lead by internal dynamics and almost inevitable interchanges with the “outer world” – MacCannell's version of authenticity would resist criticisms aimed at its essentialism, if seen as sets of values held and behaviours enacted before or in the absence of the influence of tourists in the backstage where tourists have no influence.

Markers + the exotic and its consequences

Authors subsequent to MacCannell have reduced the explanatory ambition of tourism as a cure for modernity, albeit they still see it as part of modernity. Some have underlined the separation of leisure from non-leisure, as Curtis and Pajaczkowska (1994) who observe that in the realm of tourism the meaning of “holiday” is kept as free as possible from any reference to the world of work:

What guidebooks fail to mention is all visual evidence of similarity between ‘abroad’ and ‘home’. Reference to hospitals, schools, non-historical civic buildings – all aspects’ of the social infrastructure of everyday life – is absent. (:209)

Similarly, Urry (2002(1990):1) contrasts tourism to “non-tourist forms of social experience and consciousness”, particularly home based activities and paid work. Tourism allows “one's sense to engage with a set of stimuli which contrast with the everyday and the mundane” (:2), a framework within which he points to variations according to society, social group and period, similarly to what is argued by Roberson, 2001 (quoted above).¹⁵³

To this notion of tourist, Urry adds minimal characteristics of the social practices that are described as “tourism”:

(1) it is performed (physically) away from home; (2) it is temporary (the tourist has a clear intention of returning home); (3) the places where the tourist goes are chosen through anticipation of intense pleasures “on a different scale or involving different senses from those customarily encountered”; (4) the tourist gaze is directed to “features of landscape and townscape which are taken to be in some sense out of the ordinary” [in this Urry includes places made relevant by its historical or literary associations]; and (5) [quoting Culler (1981:127)] the fact that “the tourist is interested in everything as sign of itself”

These criteria seem, though, insufficient to distinguish tourism as unique unless physical distance is considered, but this seems a trivial criteria from a social/cultural point of view unless it would have cultural social/cultural implications (which Urry does not explore) as in Simmel’s (1950) stranger¹⁵⁴. Assuming in (1) “away” means “outside the context where a person’s everyday life takes place”, several practices fulfil the remaining criteria, even when adding the contrast to the world of work as a criterion. A day trip, a ride in a tourist bus in one’s own city or attending an artistic or sports event – all these activities may be considered tourism if they are performed trying to gaze at “everything as sign of itself” (e.g. considering not only an actual

¹⁵³ Interestingly, the *tourist* stems from *Grand Tour*, which was performed by social elites who either did not work (Salgueiro, 2002) or for whom work was not essential to survive, and amongst whom the sights (mostly ancient buildings and the like) were considered part of education.

¹⁵⁴ “He is not radically committed to the unique ingredients and peculiar tendencies of the group, and therefore approaches them with the specific attitude of “objectivity” (...) a particular structure composed of distance and nearness, indifference and involvement. (page 3)

sport event but the history of the teams involved and/or what they represent¹⁵⁵). Further, the modern tourist now also visits large-scale recreational sites such as Disneylands and other theme parks, a fact which implies (Cohen 1995; Moore *et al.* 1995¹⁵⁶) a progressive segregation of tourism from the daily reality of local life and the erosion of the boundary between tourism and ordinary leisure.

Such erosion is ultimately assumed by Urry (2002(1990):74), who considers his notion of the tourist gaze as “increasingly bound up with, and as partly indistinguishable from all sorts of other social and cultural practices”.¹⁵⁷ This makes Culler's (1981:127) criterion – “the tourist is interested in everything as sign of itself, an instance of a cultural practice” – the more so interesting, as a feature of tourism but also of (certain forms of) culture. Urry exemplifies it by affirming that when the tourists sees two people kissing in Paris what they capture in the gaze is “timeless romantic Paris” and quotes Culler's (1981:127) when he says tourist are “armies of semioticians” in search for signs of “Frenchness, typical Italian behaviour, exemplary Oriental scenes, typical American thruways, traditional English pubs”.

We do not literally 'see' things. Particularly as tourists we see objects which are constituted as signs. They stand for something else. When we gaze as tourists what we see are various signs or tourist clichés. (Urry (2002(1990):117)¹⁵⁸

This semiotic perspective has been further developed by Culler (1990:132) who defines a marker as “any kind of information or representation that constitutes a sight as a sight: by giving information about it, representing it, making it recognizable” This very much follows MacCannell (1999(1976):41), who holds that without the aid of a marker a layman could not

¹⁵⁵ This can be observed in Portuguese football pre-match comments, where statistics ranging back more than 50 years are often quoted as if they were relevant to foresee the result, ignoring that only club names remain unchanged through time, and that players, team managers and club management have meanwhile changed often.

¹⁵⁶ Quoted in <http://hotelmule.com/wiki/Sociology>.

¹⁵⁷ This “de-differentiation” process makes the tourist gaze postmodern (albeit not exclusively), because much of what is appreciated through the romantic tourist gaze is not directly experienced reality itself but ideal representations conveyed by photography, postcards, guidebooks, television and the internet. It should be noted, however, that Urry sees postmodernism as coexisting with premodern, realist and/or modernist cultural elements in a given society.

¹⁵⁸ In this same work Urry (page 117) provides a typology of signs. They can work metaphorically (“a pretty English village can be read as representing the continuities and traditions of England from the Middle Ages to the present day”); the term “fun” in an advertising for a Club-Med holiday is a metaphor for sex) and metonymically, the substitution of some feature, effects or cause of a phenomenon for the phenomenon itself (an ex-miner now employed at a former coalmine to show tourists around is a metonym for structural change in the economy).

distinguish rocks taken from the Moon from a rock taken from the Earth. What he calls “sight sacralisation – the isolation of a sight as special, a “must,” a “real experience”, free from inauthenticity, is performed through markers – on-sight and off-sight ones such as signposts, guides, postcards, effigies, advertisements and, it could be added, travel books.

The exclusive association of such use of markers to tourism (Culler and MacCannell) and to modern society (MacCannell) should be tempered, mostly so when the latter holds that “*anything* that is remarked, even little flowers or leaves picked up off the ground and shown a child, even a shoe shine or a gravel pit, anything, is potentially an attraction” (1999(1976):192).¹⁵⁹ Although in tourism a material base is not always necessary to sustain a tourist attraction¹⁶⁰, if any highlighting or attribution of meaning is classified as a creation of a tourist sight, then tourist sights have been being created since language was invented, and tourism loses its specificity and historical location within modern society.

Perhaps what is described as tourism by many of the theoretical proposals considered in this literature review should, then, be considered a matter of attitude, not of circumstances nor of material ways in which is performed (as organized travel) – and it should be named differently. Such attitude can, in fact, be enacted within ordinary life, e.g. by gazing at buildings for their historical and aesthetic value when commuting to work or by going to museums in one’s own city. This may have the implication that “people are much of the time ‘tourists’ whether they like it or not” (Urry, 2002(1990)), but it does not seem specifically associated with modernity (MacCannell) or postmodernity (Urry and MacCannell).¹⁶¹ In fact, such encompassing definition of sightseeing can be seen at work in historical periods prior to the advent of tourism. For example, in 1689 a Japanese poet “leaped with joy [in the presence of] the celebrated pine tree of Takekuma (...) exactly as described by the ancient poets”, a model for the contemporary tourist according to Frow (1991), where the Japanese poet is quoted (:124)¹⁶².

¹⁵⁹ Urry (2002(1990):97) sees this in the more restricted context of a “postmodern museum culture in which almost anything can become an object of curiosity for visitors”.

¹⁶⁰ Rojek (1999:198) provides the example of the Catherine Cookson trail, (a British best-seller novelist) which is still “present” through steel street markers that locate the sites of houses where Cookson was born and raised. Rojek recognizes, though, that “the impact of the Streets of Dickens tour in London is diminished by the fact that his two main London houses have been demolished.”

¹⁶¹ In the introduction to the 1989 Edition of *The Tourist* MacCannell sees his original 1976 work in the light of the notion of postmodernism, although distancing himself somehow from it, as detailed in section 2.4, above).

¹⁶² Horne (1984), quoted in Urry (1990 (2002)), describes the contemporary tourist precisely as a modern pilgrim, carrying guidebooks as devotional texts.

Irrespective of whether it is widespread only in contemporary society (be it modern, late modern or postmodern), this attitude has important consequences in the relation between observer and observed, by downplaying the actual practices and perspective of the individuals, cultures and societies gazed upon. This is because cultural experiences offered by tourism are consumed in terms of prior knowledge, expectations, fantasies and mythologies generated in the tourist's origin culture rather than by the cultural offerings of the destination, as emphasised by Craik (1997:118). Culler (1990:2), for example, notes that tourists regard local objects and practices as cultural signs despite "natives' explanations that thruways just are the most efficient way to get from one place to another or that pubs are simply convenient places to meet your friends and have a drink".

Referring to sights visited and photographed by travellers, Frow (1991:125) holds that "a place, a gesture, a use of language are understood not as given bits of the real but as suffused with ideality, giving on to the *type* of the beautiful, the extraordinary, or the culturally authentic (...)". When applied to foreign cultures, this could be seen as exoticism, or the "aesthetics of diversity" (Segalen, 1978)¹⁶³, a mode of aesthetic perception which "renders people, objects and places strange even as it domesticates them, and which effectively manufactures otherness even as it claims to surrender to its immanent mystery" (Huggan, 2001:13). Huggan couples such attitude with nostalgia and the search of authenticity: the exoticist constructs a vision of a Golden Age which has long vanished or that it has never existed, and for Bongie (1991)¹⁶⁴ exoticism seeks "to salvage the space of an other that is beyond the bounds of modern civilisation" (: 4-5).

Tourist gaze(s) and hierarchies of visitors

Detailing his concept of the tourist gaze, Urry (2002(1990)) bases himself on Walter (1982) to distinguish the **collective gaze** and the romantic gaze, which are created by an interplay between tourists themselves and (mostly professional) mediators (see section 1.4, page 16, above, for details on mediators). The collective gaze demands the participation of large number of other people to create a particular atmosphere: "They indicate that this is the place to be and that one should not be elsewhere" (Urry (2002(1990):150). If "travel is the maker of status", than one

¹⁶³ Quoted in Holland and Huggan (1998).

¹⁶⁴ Quoted in Huggan (2001).

should go to the right places: for Urry, “one of the problems for the British seaside resorts is that there are not enough people [there] to convey this message” and he speaks of the strange experience of “Brighton or Lyme Regis on a sunny summer's day with the beach to one self” (:43).

A difficulty also seems to exist here. Although a certain place could be “the place to be” for a given tourist because many other tourists usually are there, there must have been some original driver who made people gather originally at a certain place.¹⁶⁵ As the British seaside resorts example suggests, possible motives include physical pleasantness (and not mere what is pleasant to the eye), but they can also be remains of the past (certainly also amongst the main drivers of tourism), shopping (lower prices or goods not available at home) or the cosmopolitanism of major cities. This latter attracting factor (noted by Urry himself) can stem not only from tourists but also from local inhabitants and general physical, ethnic, and cultural diversity and sheer quantity (of streets, buildings, etc).

Besides the collective tourist gaze, Urry also considers the **romantic form of the tourist gaze**, which emphasizes “solitude, privacy, and a personal, quasi-spiritual relation with the observed object.” (:150) (Of course the fact that collective gazers make by definition a large group does not mean that romantic gazers are few(er): possibly the volume of people wanting to travel off the beaten track is nowadays much significant, given a segment of the tourist industry exists just to cater for them. If not everybody can play the classical ethnographer in his long, solitary relationship with a premodern, isolated community, moderns (or postmoderns) can at least try to be romantic tourists.

Such desire is also considered (*avant la lettre*) by MacCannell (1999 (1976):43) when he writes that “some tourists feel so strongly about the sight they are visiting that they want to be alone in its presence, and they become annoyed at other tourists for profaning the place by crowding around ‘like sheep’”. This implies a kind of moral hierarchy of travel contrasting the tourist with other figures. Fussell (1980)¹⁶⁶ maintains that to explore – to seek the undiscovered, in European terms – is the ultimate, because most authentic, experience of abroad, and tourism is the least authentic because it aims for the known and the safe, or the familiar. According to this

¹⁶⁵ This is akin to the process, as per MacCannell (1999 (1976):146), by which an object suffers “sight sacralisation” through a series of stages, one of which is the “mechanical reproduction of the sight in question through miniature souvenirs and, especially, endless photographic reproduction” which must be reproduction of something.

¹⁶⁶ Quoted in Hunter (2002).

view, travel would therefore exist in between the two extremes, being more legitimate than tourism and “the inheritor of the legacy of [“the athletic, paramilitary activity of”] exploration (which, of course, is no longer possible)”. Studying the Grand Tour and travel until 1840, Buzard (2002:49) refers to Erving Goffman's “role distance” as a way of “modern travellers and travel writers identifying themselves as anti-tourist beings whose unhappy lot was to move amidst and in the wake of tourists, *for one of whom they might even be mistaken*”. Similarly, Smith (1977)¹⁶⁷ notes

elite tourists who prefer adventure and are concerned with having unusual and unique experiences with different cultures consider themselves 'travellers', and would not accept the label 'tourist' placed on them.

In their turn, Siegel and Wulff (2002:115) build a hierarchy based on what they call the question of power: “the tourist is led while the traveller leads, the tourist is timid – while the traveller is adventurous, the tourist cannot properly ‘see’ the journey while the traveller is erudite and knowledgeable.” To this they add that some travellers resort to the “mediation of the library”, a set of knowledge obtained in books called for by the moving experience of space” as per Montalbetti (1997)¹⁶⁸, a case of a marker at work feeding site sacralization (as per previous subsection); in the same vein, Molina (2004:33-34) holds that the “literary traveller” obtains information about what s/he going to see and tries to engage in aesthetic experiences and obtain knowledge.

If (s/)he to enter untouched territory, the explorer does not (and cannot) have anything to read before departing. According to Leed (1991)¹⁶⁹, “historically, travel has often been seen as a repository of (...) intangible aspects of life, and was the medium through which many Europeans (mostly men) sought sources of meaning, and even immortality in the form of their accounts”; this opposes “the tourist [who] departs and sojourns with a clear intention to return 'home'” (Abramson and Pinkerton, 1995:308). Tavares (2004:52) adds that the fact that mass tourism and globalization have effectively foreclosed this quest is something such men are not willing to accept. Hence, “their travel writing is popular precisely because a significant portion of the

¹⁶⁷ Quoted in Birx (2006).

¹⁶⁸ Quoted in Besse (2004).

¹⁶⁹ Quoted in Tavares (2004).

Western public is keen to read books in which they can find evidence that the world is still heterogeneous, unfathomable, bewildering, [...] that the spirit of adventure can hold off the threat of exhaustion' [here he is quoting Holland and Huggan, 1999:2].

Other conditionings of displacements away from home

The focus of the present chapter on the motivational and cultural dimensions (why to go?) should not make us forget the influence of material possibilities on the way tourism is performed and/or the other is encountered. Various conditions determine *a priori* who can afford go (e.g. the cost of travel) and the mode of going (e.g. preferences for physical comfort or “metaphysical” comfort that avoid uncertainty and the unknown), thus influencing the gaze. Here, economic possibility is of course one of the major reasons behind mass tourism, as economies of scale allow for large groups of people to travel who could not afford more individualized forms of travel – Urry's (1990) place to be being often the place that one can financially reach, together with flocks of fellow tourists however one might be indifferent to the collective gaze and wishes to escape it. It is thus that, depicting the decision environment of the tourist, Borgatta and Montgomery (2000:3171) identify as key elements subjectivity (curiosity, interest, discovery, opportunity, and “digression”); security (the sense of confidence that vacation places must transmit and the possibility of relaxing, nearly the opposite of the insecurity of large cities); and transgression (willingness to have a good time, to push the limits, to have “extraordinary” and “sensual” experiences); and, last but not least, budget and status.

This relevance of the material dimension of displacement makes useful **Leitch's (2009)** distinction between the migrant, the tourist and the traveller when looking into FLO¹⁷⁰. Based on empirical research on the TW of Mark Twain (which is taken as a truthful rendering of the writer's travels and circumstances, presupposing respect for the pact of factual reading of the genre), he associates the writer's intentions when travelling or living in a given social world with the various conditions in which the travel and/or the sojourn takes place (which he associates with different texts), suggesting a causal connection.

Leitch notes that as tourist Twain travels in a large group, hires tour guides and visits “sites important to him, rather than sites important to the culture he tours”. As a traveller he goes

¹⁷⁰ Given the common sense (and in some cases even academic) romanticizing of the traveller, namely in opposition to the morally inferior tourist, as seen above, it would be preferable to use more neutral terms instead. However, because Leitch's (2009) is followed to some extent in this study, his terminology is used.

beyond seeing the sights, being led also by hosts in their respective countries, and spends more time in each stop, interacting with both residents and travellers. When Twain migrates, rather than seeing the sights, he works locally and is accommodated locally (a tent, a cabin he builds, an apartment), instead of in hotels or with friends. Each of these types of circumstances generates specific consequences:

Twain is more likely to judge a phenomenon according to his existing set of values when he is touring. When migrating, Twain judges phenomenon according to the terms of evaluation set down by the culture he is joining. When travelling, Twain seems most able to bring his experiences abroad to bear on his own cultural presumptions, engendering a reflective mode that acknowledges the distance between his culture and the encountered culture without necessitating particular judgment of that distance.¹⁷¹ (:4)

Leitch notes an “Olympian relationship” to the travelled culture,

one that understands its separation from the world as a privileged position from which to issue judgment. The Olympian judge – the tourist – takes her/himself as having this privileged position insofar as their judgments are not tainted by enmeshment in the world. (page 31)

To this epistemological criterion of the Olympian relationship one could add the degree with which the visitor engages in non market, non instrumental relations with the locals to distinguish the tourist from the traveller. The traveller mostly connects in terms of affection, acquaintance (most probably) or inquiry, and as a minimal consumer of what s/he needs for survival (contrasting to mostly self-catered explorer). Tourists are surrounded by a web of relations in which they are (and are seen by the locals as) primarily a potential buyer of products and services which are, in the case of the package holiday, designed specifically for visitors (as opposed to those tailored for local needs, which the traveller acquires); tourists are not interested and/or not able to establish affective or epistemological links. This perspective has the advantage of including the point of view and attitudes/behaviours of local people, who are not passive agents waiting for the visitor's initiative but often actively (try to) engage or reinforce relations of

¹⁷¹ Although Leitch's analysis suffers from the problem of implicit quantification (discussed in detail in the methodology chapter) he is careful to stress that he is proposing causality between ideal types, noting that Twain's persona in each book is not purely a tourist, a travel or a migrant and that many migrants only partially adopt, or outright resist, the living practices common to the area to which they migrate.

the various types mentioned; together with visits to sights, it is used to establish an operational distinction amongst the authors of the corpus (first section of Chapter 4).

The migrant does not fit this instrumental versus affective axis, since it has been *a priori* distinguished by the criterion of permanence within otherness trying to generate income within the local economy; in his case, high(er) levels of both those types of relationships can and tend to coexist, in the same way as between an individual and its surrounding sameness. The migrant is not, then, an extreme, romanticized version of a traveller fully affectively integrating with otherness, as Peter Mayle describes himself in Provence (as detailed above in this chapter). As it is known, migrants sometimes establish with locals mostly market relations, engage in affective relationships mostly with people of the same origins, in many cases preserving their original culture more intensely than their peers “at home”.

2.7 – The approach of sociology of literature to the factual literature on otherness

Sociology has dealt with literary works from several perspectives. In an old definition, Cândido (1967:5) defines sociology of literature as dealing with tendencies in book consumption, genre preferences and the social origins of writers. He also includes studies aiming at

relating a given period/genre with social conditions, assessing in which measure the works reflect reality, finding the mode of association between the work and the public, analysing the position and the social function of the writer and the political function of the work and to explore the origins of literature and some genres” [my translation from the Portuguese original].

In a more recent view, Griswold (1993) notes that the sociology of literature has during the past few years concentrated on readers' construction of meaning and on networks within literary systems. She also notes as new avenues of research the relationship between literature and group identities; the connection between institutional and reader-response analyses; the role of authorial intentionality; and differences between literature and other media.

The first theoretical projects within the sociology of literature dealing explicitly with social structure are those of Lukacs (1961) and Goldman (1950, 1964)¹⁷². The former worked on “a

¹⁷² According to the *International Encyclopedia of the Social Sciences* (1968, article on “Literature”, retrieved from <http://www.encyclopedia.com/topic/Literature.aspx>). From Dirkx's (2000) presentation of the history of the sociology of literature one reaches a similar conclusion.

parallelism between the aesthetic patterns of the work of art and the contemporary economic structures of society”¹⁷³. Goldmann (1964)¹⁷⁴ created the notion of “**genetic structuralism**”, a relation between the structures of a literary work (relations between characters, plot evolution and time and space organization) and the social structure surrounding the (production of) the literary work. He also resorts to the concept of “**world vision**” – the complex of ideas, aspirations and feelings connecting the members of a social group and opposing them to members of other groups – to argue that only great writers and philosophers are able to express in a coherent way the conscience of the social group to which they belong.¹⁷⁵

More generally, Borgatta and Montgomery (2000) and Dirkx (2000) denominate reflection theory or theory of the reflex the notion that literature can be read as information about social behaviour and values and are both sceptical towards it. The former write that:

The basic idea behind reflection, that the social context of a cultural work affects the cultural work, is obvious and fundamental to a sociological study of literature. But the metaphor of reflection is misleading. Reflection assumes a simple mimetic theory of literature in which literary works transparently and unproblematically document the social world for the reader. (page 1644)

Some of Bourdieu's (1979, 1980) theoretical propositions on literature can be considered a case of this.¹⁷⁶ He applies his general theory of the fields to literature – which is seen as relatively autonomous and governed, as other fields, by a specific basic law (*nomos*) – to hold that in it the “struggle” is about trying to monopolize the legitimate definition of the word literature or the word writer. A system of relations exists in the brain of the writer and the works which filters influences coming from other fields, in a struggle between the “heteronym hierarchization principle” – favourable to those with power in the cultural, economic and political fields – and the autonomous one – art for art's sake (*l'art pour l'art*). Besides this, Bourdieu identifies two axes structuring the literary field: dependence vis-à-vis the general public, defining the subfields of restricted production and general production; and degree of literary recognition/capital. Therefore, one needs to locate the literary field within the field of power, analyse the internal

¹⁷³ Idem.

¹⁷⁴ Quoted in Reis (1981:110).

¹⁷⁵ As presented by Chartier (1988).

¹⁷⁶ This paragraph is based on the summary made by Dirkx (2000) of *Le Sens pratique* (1980) and *La Distinction - Critique sociale do jugement* (1979).

structure of the literary field and study the “agent's disposition systems”, seeing the work as the product of an adjustment of capital and *habitus* to one of the possible positions in the field.

Bourdieu (2006) applies this theory to Gustave Flaubert's *L'Éducation sentimentale*, claiming that the structure of the social space of the novel is the structure of the social space in which the author was located, reestablishing “in an extraordinarily exact manner the social world in which it was produced and even the mental structures which, fashioned by these social structures, form the generating principle of the work” (:32). Based on the text, in personal letters and in the notebooks where the narrative was outlined, he concludes that protagonist Frédéric expresses a “social idealism in terms of escaping the limitation intrinsic to social existence” (my translation from the French original edition; Bourdieu, 1992:53) (a form of searching for authenticity, as seen above), and insert him within what he assumes to be the Flaubertian definition of the writer as a socially independent individual. This is deemed the generating principle of the work and, according to the French sociologist, only by analysing the origins of the literary field and the “specific conditions which have given rise to the Flaubert's special lucidity” (Bourdieu, 2006:47) can one reach comprehension of such principle.

Such analysis is somewhat paradoxical in that social context induces a writer to state his autonomy from social context through a writing that renders that same social context. Further, the causality from Flaubert's social surroundings to the social structure shown in the narrative of *L'Éducation sentimentale* seems to implicitly assume strong assumptions regarding intermediate causality steps that would not necessarily apply to other individuals with similar biographies and facing the same type of circumstances, given agency is expected to be especially powerful with the fiction writer.

Following Bourdieu's reasoning, (1) the structure of literary space generates the writer's “social idealism”; (2) this “social idealism” is problematized in writing; (3) this problematisation is made by means of a history which emules the social structure in which the writer is inserted. There is plausibility regarding (1), the social genesis of “social idealism”, e.g. as an attitude facing the writer's constrained circumstances (in the literary, economic, cultural or political, etc fields). Regarding (2), it might be argued that given the same social constraints, an individual might as well have not written or (physically) moved to other social context (e.g. another country), so he might have decided to write for reasons other than those related to his social circumstances (e.g. the black box of “artistic agency”). Finally, in assumption (3), if social

structure is relevant in generating a search for freedom from social constraint, it seems plausible that it would be reflected not necessarily in terms of emulation but rather in terms of contrast (e.g., a fictional context where people do not feel at all limited by the rules of Civilization à la Kant, as per section 2.3).

It seems, then, that the influence of social structure is overemphasized here. These propositions are somewhat surprising given that Bourdieu (1991:2) (in a work originally published in 1988 reading and contextualizing Heidegger's works), speaks of the "relative autonomy of the field of philosophical production" and criticizes Adorno's analysis of the philosopher by failing to reveal the "alchemical transformation which protects philosophical discourse from direct reduction to the class position of its producer" (:3). According to him

any adequate analysis [of philosophical works] must accommodate a dual refusal, rejecting not only any claim of the philosophical text to absolute autonomy (...) but also any reduction of the text to the most general conditions of its production (page 2)

While philosophical production must at least be bounded by logical rules, which despite being prone to change overtime and within cultures and social groups may show some stability, the literary field and mostly the subfield of fiction has as one of its Bourdieun laws, as referred above, "art for art's sake". Considering this, it is *a fortiori* hard to see why *L'Éducation sentimentale* would have been constructed with such a low degree of autonomy as in Bourdieu's description.

In what regards TW and FLO, there is a case for expecting the presence of social environments. These are, however, the social environments authors experience in their contacts with otherness via their senses and their perception frameworks, not so much the social environments of the sameness they may have experienced and internalized in their habitus (although of course perception frameworks depend very much on such socialization process and hence on the author's own social environments).

2.8 – The factual literature on otherness and ethnographies as studied by ethnographers and other critics

Until the “Malinovskian revolution”, anthropology would contact with its subject matter “exclusively through accounts of travellers moving with other purposes – trade, war, proselitism” (Sardan, 1995:74, my translation from the French original), being therefore close to TW and FLO and prone to the corresponding epistemological weaknesses (as per section 1.4). Anthropology achieved status as social science in the early twentieth century partly by defining itself *against* amateur TW, “which, along with the reports of colonial officials and missionaries, had theretofore provided a significant basis for Western knowledge about non-Western cultures” (Nixon, 1992:70). Such status, along with the authority apparently gained through the minimum sojourn of two years in the observed community which became standard for anthropologists (also Sardan:74) has been recently scrutinized and challenged by various so-called postmodern perspectives (included some from within social science itself), with ethnography and TW even showing lately signs of convergence (Nixon, 1992:70).

Ethnographic writing has been studied very much in the same way as TW, that is, taken critically as text and not as mere textual rendering of a supposedly objective truth, being problematized in its (deemed unbalanced) power relationships between writers and written peoples. This has been the work of literary critics along with practitioners of cultural studies and postcolonial studies (their perspectives on TW being considered below), but anthropologists themselves have taken a reflexive view on their own methods of representing social worlds.

Specifically, American anthropologists have studied not only the classical and founding works of the discipline (as noted by Atkinson, 1990) but also more recent ones. Clifford Geertz reads Lévi-Strauss, Malinowski and Mead “in much the same way as one reads a travel book or even a romance, paying attention to author, style and purpose” (Blanton, 2002:129). Geertz's “Deep Play: Notes on a Balinese Cockfight” (1975) is itself analysed by Pratt (1986), who examines how tropes of ethnographic writing are used and their relation to earlier “discursive traditions”. Pratt's text is part of a work (Clifford¹⁷⁷ and Marcus, 1986) that studies ethnographies from several perspectives, including the way the ethnographer establishes his authority as an author, the alternation between personal account and objective description and the classification

¹⁷⁷ James Clifford should be formally considered an historian, as his PhD was in History (see his CV at <http://people.ucsc.edu/~jcliff/ShortCV.pdf>).

of the ethnographic discourse as “salvage mode” or “redemptive mode” regarding the cultures studied.

Developing the concept of **“salvage” ethnography**, Clifford (1986:113) emphasizes in the same work that “it is assumed that the other society is weak and ‘needs’ to be represented by an outsider (and that what matters in its life is its past, not present or future).” According to him, such attitudes, though they persist, are diminishing: “Few anthropologists today would embrace the logic of ethnography in the terms in which it was enunciated in Franz Boas’s time, as a last-chance rescue operation” (:113). In the same volume Marcus (1986) further distinguishes within this context:

in the **salvage mode**, the ethnographer portrays himself as ‘before the deluge,’ so to speak. Signs of fundamental change are apparent, but the ethnographer is able to salvage a cultural state on the verge of transformation. (...) In the **redemptive mode**, the ethnographer demonstrates the survival of distinctive and authentic cultural systems despite undeniable changes.’ (:165)

In a later work Clifford (1988:10) deals with several twentieth century writings and representations of otherness trying “to show that ethnographic texts are orchestrations of multivocal exchanges occurring in politically charged situations”. Focusing on French anthropologist Marcel Griaule (among other practitioners), Clifford shows that his ethnographic methods changed over time¹⁷⁸ and differed from the Anglo-Saxon tradition of ethnography¹⁷⁹, thus affirming “the predicament of culture” at work in the very representation of cultures. In line with this, he holds that

no sovereign scientific method or ethical stance can guarantee the truth of [anthropological] images. They are constituted – the critique of colonial modes of representation [dealt with below] has shown at least this much – in specific historical relations of dominance and dialogue” (:23)

¹⁷⁸ At one point Griaule engaged in a process of verification and commentary after fact collection, including inquiry of witnesses for meaning of obscure gestures very much in the same way as the detective or examining magistrate. He later abandoned it (Clifford, 1988:70).

¹⁷⁹ Although Clifford denies the existence of a specific, consistent French tradition of fieldwork (:60) he notes the specialization and division of labour in Griaule's method, which involved several people with different functions as regards observation, as different from the solitary contact with otherness of the classical American and British anthropologist.

It is of course contentious if such postmodern critique is generalisable to all methods of representation or if it is more a problem of the colonial heritage of classical anthropology but Clifford makes a good case for his position with his description and analysis of the hearings of a court case which entailed defining a culture.¹⁸⁰

Atkinson (1990) also focuses on ethnographic texts, performing an empirical analysis of pieces of ethnographic works deemed representative of the use of rhetorical devices. Taking as subject scientific articles in sociology, Edmondson (1984) makes a similar analysis, proposing the concepts of rhetorical induction (:12), and rhetorical deduction (:20) (the latter consisting, *inter alia*, of the enthymemes of the ordinary person, the normal person, general topoi and special topoi, which are useful below in this study).

Travel(ing) outside social science: literary, cultural, critical and postcolonial studies¹⁸¹

Until recently, literary studies paid little attention to TW, with the exception of “recognized” works of literature since the 1970s within the cultural studies approach (Korte, 2000:2). The first “critical analysis” (that is, in the realm of Humanities) of TW focused mainly on formal or aesthetic attributes of texts, while lately literary Humanities have both intensified such perspective and pay more attention to the relation between TW and the context in which it arises (Hawkins-Dady, 1996). According to Tavares (2004:19), in recent years many studies on twentieth century TW performed largely by literary critics have been published, and he presents as examples, amongst others, authors considered in this study such as Fussel (1980); Blanton (1988); Holland and Huggan (1998); Korte (2000); and Hulme and Youngs (2002).

These and other studies on TW quoted throughout the present study fit into areas institutionally outside or not completely within the so called social sciences (e.g. research carried out outside a sociology or anthropology department). There may be also methodological or even somewhat ideological differences given that, as it is detailed below, some studies tend to focus *a priori* in trying to show the asymmetry of power relations between travellers and peoples of travelled lands).

¹⁸⁰ This took place in 1977 in the Boston Federal Court, where the descendents of Wampanoag Indians living in the town of Mashpee in the US State of Massachusetts tried to prove their specific cultural identity in order to establish rights over land. Professional historians, anthropologists, and sociologists participated as expert witnesses.

¹⁸¹ Despite the problem of the implicit quantification (detailed in the methodology chapter, below) it is considered that the scholar works within this area of study may provide valuable insights and inspirations to this study, the reason why they are considered.

As regards themes, the so called critical work on TW has recently included

the nature and function of the stereotype, lexical matters (...) the subjective presence of the author in texts of knowledge, truth value in narrative writing, the independent or hard-wired shape of narrative itself, the rhetorical nature of fact ‘identification’ in reading (with its consequences in social and political life), the representation of time, inter-cultural ‘translation’, and the function of metaphor and other figures” (Bassnett, 2002).

Many of these studies are located within the so called fields cultural studies or post-colonial studies, dealt with in detail below. Institutional compartmentalisation apart, such designations are to some extent interchangeable: post-colonial studies can be included in literary studies and cultural studies; cultural studies is a transdisciplinary area which partially uses literary methods; and literary scholars focusing on TW commonly engage in power relations issues which are one of the core subjects of cultural studies.

Specifically, the field of **cultural studies** is defined by Sardar and Van Loon (1999)¹⁸² in that:

“[1] it aims to examine its subject matter in terms of cultural practices and their relation to power”; [2] “has the objective of understanding culture in all its complex forms and of analyzing the social and political context in which culture manifests itself”; [3] “it is both the object of study and the location of political criticism and action”; [4] it attempts to expose and reconcile the division of knowledge, to overcome the split between tacit cultural knowledge and objective [universal] forms of knowledge”; [5] “it has a commitment to an ethical evaluation of modern society and to a radical line of political action”; [6] “since cultural studies is an interdisciplinary field, its practitioners draw a diverse array of theories and practices”.

While elements 1 and 2 of this definition could allow the inclusion of cultural studies as a subfield of sociology, the other elements are problematic in this regard. Sociology (and, more generally, social science) can foster change in society by highlighting certain social mechanisms (namely, of domination), but usually it does not depart which such goal, as it might jeopardize methodology or unduly restrict *a priori* the subject matter.

¹⁸² Quoted in Duncan *et al* (2004).

The critique regarding the pre-eminence of ideological goals over a(n intended) more objective view may also be applied to **postcolonial studies**, in as much as they may be deemed a subarea of literary or cultural studies in which the emphasis is on power relations between writing colonialists and written colonized peoples and the legacy and/or subsistence of those relations in the way certain people are looked upon and written about.¹⁸³ The issue is apparent in Pratt (2008(1992:3), whose book “aims to be both a study in genre and a critique of ideology” and “is about loosening imperialism’s grip on imagination and knowledge, and creating clearings for better ways of living in and knowing the world.” (page xiii)

Developing the explanation of the epistemological origins and the postmodernist orientation of this position, Birx (2006:1910) holds that

In postcolonial thought, there is good reason to reject essentialist characterizations of peoples, societies, and cultures. The reason is that, according to postcolonial thought, “knowledge is power”, but not in the traditional sense of knowledge giving one real understanding of the world (...). Rather, the postcolonial view, following Michel Foucault, is that “knowledge is power” in the sense that what we call “knowledge” is really constructed ideology with no grounds in reality, which is designed to justify the imposition of power over others, to repress and exploit others for fun and profit.¹⁸⁴

From this base (still according to Birx) postcolonialism becomes critical toward imperialism and colonialism, especially of the European sorts, with anthropological research on “other” cultures being challenged by an attack on the authority of anthropologists to speak for other cultures (very much in the same way as Clifford (1988), as seen above) and essentialist descriptions of those cultures:

Postcolonial preferences in reporting on other cultures would be for an emphasis on “voices” of the subjects themselves; that is, instead of commentary and analysis by the anthropologist, ethnographic reports would consist of comments and commentaries by the “natives.” (...) Western anthropologists (...)

¹⁸³ In his survey *Postcolonial Theory*, Moore-Gilbert (1997:12), quoted in Huggan (2001) defines postcolonial criticism as “a more or less distinct set of reading practices (...) preoccupied principally with analysis of cultural forms which mediate, challenge or reflect upon (...) relations of domination and subordination”.

¹⁸⁴ Still following Birx, the idea that knowledge is solely a constructed ideology is of course prone to epistemological (self-)destruction: “this other postcolonial epistemological principle, that true knowledge does not exist, raises the same kind of awkward question that arises with all relativist theories: must postcolonial doctrines and assertions, like those to which it directs its critical attention, be considered “constructed ideology with no grounds in reality which is designed to justify the imposition of power over others?” (:1910).

can legitimately only advocate on behalf of the colonial oppressed, the subaltern, the disadvantaged, while at the same time condemning their oppressors, European and American imperialists and advocates of capitalist globalization. (...) [Therefore], under the influence of postcolonialism, much academic anthropology has discarded aspirations of a scientific nature and taken on the character of political advocacy. Birx (2006:1911)¹⁸⁵

The presence of a colonial or hegemonic discourse is one of the recurrent features identified in academic studies on TW. According to Blanton (2002:128) several studies by anthropologists and literary critics have centred on the way in which TW tends to be Eurocentric and imperialistic. In line with Birx, he claims that “following Foucault's conflation of knowledge with power, travel writing, certainly much of the older texts, can be regarded as 'hegemonic' discourse” (:128). In turn, Sharp (1999)¹⁸⁶ holds that Western travellers have adopted a colonialist style of writing, a style which assumes the superiority of his cultural and moral values and that, even when is sympathetic towards local inhabitants, sees them as childlike or lacking reason.

These presence of hegemonic discourse is also identified (mostly in English scholars of the eighteenth and nineteenth centuries working on the Middle East) in Said's (1978) *Orientalism*, considered the first contemporary critical work to focus mainly on TW and usually seen as the seminal text for postcolonial studies (Hulme and Youngs 2002a:8). Melman (2004) renders Said's concept of **orientalism** as

an academic tradition, a style and, most importantly, a way of 'making sense' of the Middle East that draws on a binary epistemology and an imaginary geography that divides the world into two unequal and hierarchically positioned parts: the West and the East, the Occident and the Orient, Christianity and Islam, rationalism and its absence, progress and stagnation. (page 107)

Orientalism is seen by Triolo (1993:306-316) as a way of

¹⁸⁵ This does not mean that all today's anthropology is postcolonial in the sense of sustaining these thesis. For example, Geertz (1983) (quoted in Roberson (2001), an author who has read critically some classic anthropological texts (Lévi-Strauss, Malinowski and Mead), warns that natives may be too close to the culture to interpret it, too “imprisoned within their mental horizons” to produce an ethnography built around a thesis (pages 57-58).

¹⁸⁶ Quoting Pratt (2008(1992)) and Blunt and Rose (1994).

viewing other cultures as essentially (by culture or race) different in a way that privileges (and hierarchizes) the self (...) This homogenizing and dichotomizing (“us” / “them”) of identities is a mode of representation anchored by (and the anchor for) material processes dictated by power inequities – colonization, travel, militarism, trade.

Said (rendered by Birx, 2006:1911) argued that Oriental Studies, which consisted of historical, literary, and cultural examination of the Middle East, was made

not so much of dispassionate, reasoned, objective understandings of the Middle East, but rather a set of fantasy projections, distorted disparagements, and demeaning misrepresentations, the real purpose of which was not to understand the Middle East, but to justify and encourage European conquest, oppression, and exploitation of the Middle East and its peoples.

It could be counterargued, however, that from this perspective any critical comment directed towards the Middle East can be dismissed as “Orientalism”. For example, Said’s critics note that he violated his own principles in his account of Oriental Studies, accusing him of “**Occidentalism**” (Birx, 2006:1911); while Sachs (2006:111) takes issue with Pratt’s (2008(1992)) *Imperial Eyes*, another very important work in the canon of postcolonialism¹⁸⁷, to oppose the idea that Euro-American elites are “always-already in an exploitative relationship with the people and natural resources of the developing world”¹⁸⁸

The post-colonial approach is also challenged on methodological grounds. In this context, Tavares’ (2004:21) critique of the “body of geographical scholarship on colonial travel writing” could be extended to postcolonial studies in general. Tavares talks of the “top-down approach taken by many scholars who use TW merely to support pre-packaged post-colonial theory”, adding that

studying TW strictly along theoretical lines tends to highlight far more of what we bring to a given work rather than what the work in question brings to our understanding of a particular context, place or issue (...) [and] what is sought is found. (page 21)

¹⁸⁷ It is the most quoted result when searching for “travel writing” in Google scholar (4,324 quotations as of May, 25th 2011).

¹⁸⁸ Sachs (2006), quoted in Edwards and Graulund (2011).

It should also be noted that the postcolonial stance – and, more generally, that of the so called critical/literary studies – mostly looks at texts from the perspective of the difference *us* (Western) versus *them* (Third World), not making (much) room for the issue of class inequality and other inequalities that transcend such divide. Certainly otherness is most relevant, namely in the process of commodification of local cultures which may be prompted by the fascination of tourists and other visitors with the *other* (albeit very rarely the question is asked whether local people might end up better or more happy when they have their culture “artificially” revived, changed or presented for the visitor, as discussed above in this chapter). Yet, individuals in the Third World are (also) disadvantaged in the same ways and for the same reasons that some individuals in the First World, that is, by lack of opportunities for educational and material development, e.g. stemming from a rigid class structure.

A perspective different from that of postcolonial studies emerges, then, if one takes an **humanistic stance** rather than a radical cultural relativistic one (as per section 2.5, above) and accepts the value of school education creating a (more) level(ed) playing field (even considering that schooling may generate social inequalities itself, as per Costa *et al.* (2007/2008)). It should not be forgotten that writers which have been attacked by the “critical analysis” of cultural/postcolonial studies and the like are *also* more educated and read than the average of the population in *their own cultures* – and *a fortiori* more educated than any underclass, either in the First World or the Third World. Thus, their intellectual and material capital (which allows them to travel in the first place) is necessarily greater, an argument which of course can be extended even more rightly to social scientists, namely anthropologists. In fact, a Third World writer or scientist who is able to travel has also such “advantage” or “privilege” over Western people s/he might observe and write about.¹⁸⁹

Besides remarks of the kind of those articulated above it has also been commented on Said's (1978) *Orientalism* that (academic) traveller's representations of the Orient were not homogeneous in as much as they were influenced by gender, class and nationality and also

¹⁸⁹ The issue of class is also present in the search of authenticity, which is often present in discourses on otherness. According to Bendix (1997:97), “in the eighteenth century the literate and bourgeois could locate the authentic in the expressive culture of an Other, the peasantry or folk. They harboured a spiritual essence that the higher social classes had buried or lost in excessive civilization, and collecting this material and reciting or imitating it became a consuming passion. In some ways this passion is still with us.” On the other hand, addressing the annual assembly of German historians in 1984, Hermann Bausinger described *Volkskunde* [Folklore Studies] as a field that “in many ways is the cultural history of the lower classes,” distancing himself (according to Bendix (1997:173), from which Bausinger's quote is taken) “from the misconception of *Volkskunde* as a field devoted to hunting down the last genuine treasures of the folk”.

changed over time, as early explorers were quite different from those who came afterwards (Melman, 2002). Despite this, decades later Tavares (2004:21-22) proclaims its opposition to Pratt (2008(1992)) by writing that “contemporary travel writing may not be inextricably bound to, and entirely mediated by, the imaginative geographies produced during the colonial period”. As Pratt does not present exhaustive, systematic evidence to sustain her thesis, only a relatively small number of illustrative favourable cases, these may somewhat be counterbalanced by the small(er) number of cases pointing to the absence or weakness of the colonial stance, the above-mentioned proposition by Sachs (2006).

In this context one could consider the reaction to such “hegemonic discourse” identified by Dodd (1982) in English travel writers of the early twentieth century – D.H. Lawrence, Norman Douglas, Aldous Huxley, Evelyin Waugh, Graham Greene, Robert Byron and Peter Fleming – who aimed at experiencing other cultures against “what they see as the ferocious egotism, and chauvinism, of their forebears.” The shift was broadened and intensified with the end of colonialism: studying British TW between World War II and the 1990s, Matos (1999:29) sees the period as marked by a gradual destruction of a conception of a universal History in which the West has the dominant and preponderant role. In this view, the masculine and Western self (taken as a rational, autonomous entity, opposing a different Other) has been overcome by the postmodernist turn.

On section 2.4, above, perspectives were presented contesting postmodernism as regards its internal logic of epistemological self-destruction.¹⁹⁰ Even disregarding such perspectives one may conclude that positions such as those of Pratt (2008(1992)) – focusing solely on uneven power and epistemological relationships between travel writers and their written subjects – are not taking into account the empirical existence of contemporary texts in which writers do not proclaim nor show superiority vis-à-vis written people. Pratt herself allows for exceptions, finding one even in imperial times (as per footnote 117, page 63, above), while according to Appiah (1997)¹⁹¹ Redmond O'Hanlon's (1985) *Into the Heart of Borneo* subverts the conventions

¹⁹⁰ Somewhat paradoxically, despite their tendency to criticize unequal power and epistemological relations imbued in travel writing and ethnography, postmodern positions might end up by accepting more easily these two genres against more theoretical (and scientific) fields, such as sociology itself, which would according to such reasoning would be closer to grand or metanarratives, in opposition to small(er) stories of the peoples the traveller finds on the way or within whom the ethnographer lives temporarily. In its efforts to describe in an integrated fashion a whole culture, classical anthropology would of course be prone to be considered a metanarrative by such reasoning, which ends up by opposing any kind of knowledge aiming at being exhaustive and systematic.

¹⁹¹ Quoted in Duncan and Gregory (1999).

of the imperial TW genre in that he does not take himself seriously and shows up as a ridiculous individual in the eyes of natives who get amused at his expense, in contrast with imperial travellers who announced the hardships of their journeys to record their triumphs over such hardships. The attitude is also present in an older book, Eric Newby's (1968(1958)) classic *A short walk in the Hindu Kush*, where for instance a man in Turkey grabs the author's pipe from his mouth and puts it in his, performing a "parody of Englishman", and where a picture of the author and his travel companion is titled "portrait of two failures". This case of the Turkish is somewhat the inversion of Victor Segalen's notion of "exoticism" as the "aesthetics of diversity", which Holland and Huggan (1998:219) see as fitting TW, a genre that "frequently depoliticizes (and/or de-historizes) the objects of its study, and that it seeks to capitalize on aestheticized myths of cultural difference".¹⁹²

Finally, should it be noted an emphasis on difference could partially explain some negative views of otherness conveyed by FLO (and even early "scientific" discourses such as Orientalism), tempering the accusations of outright prejudice and self-interest that may be pointed at the holders of such views. Assume that for an ideal, non biased FLO writer otherness shows up, in some dimensions, as slightly more negative according to his/her direct experience and/or through objective indicators (such as comparative statistics), while in other dimensions s/he finds non significant differences (in the real world, of course, prejudice could influence the configuration of experience and the selection of sources). Under these circumstances, a global written portrait of such otherness produced by such writer may be made quite extreme in terms of negativity if the interest of the writer (e.g. based on the supposed preferences of the intended reader) on difference prompts her/him to focus on dimensions or cases in which there are differences or in which differences are greater, magnifying negativity even if prejudice is not at work. This mechanism could, of course, also operate when otherness is seen as slightly more positive in some dimensions and less or no differences are perceived in other dimensions, for example through the search for "authenticity" in premodern (or less modern) societies.¹⁹³

¹⁹² At the same time, by playing with the notion of the Englishman, the Turk is performing an aestheticization of the social, a concept developed and studied in Chapter 5).

¹⁹³ The methodology adopted in this study (see next chapter) allows for a more formal treatment of the issue, by attaching to each image of otherness presented by the authors of the corpus being studied the source of knowledge that has given rise to such image. The sources of knowledge are observation, indirect information excluding informants, informants and reflection; while observation and the selection of indirect information and informants can be tainted with prejudice, it is in reflection that a negative attitude most likely will be materialized in images. The

Further views

Despite the clear dominance of power relations, other perspectives can be found in the literature studying TW and FLO. For Kohl (1990)¹⁹⁴, the real subject of literary travelogues is not the outside world, but the evolution of the writer-travellers minds and travelogues are special forms of autobiographical writing. Korte (2000) encompasses both by seeing a gradual intensification of the “subjective component” in TW throughout the centuries, while Todorov (1996), as rendered by Lisle (2006:44) argues that

At different times in history, TW has either focused on the emotional and personal transformations experienced by the author or on the author’s physical movement across space.

In the same vein, Blanton (2002:xii) tries to “define the genre travel writing by means of sketching its long and complex history considered largely as a function of changes in the nature or the narrator’s place in the narrative”. With this, he means the degree of presence of the narrator’s persona in text – that is, intended “objective” accounts of a reality supposedly accessible by everybody in the same way, against a “subjective” perception, including the feelings aroused in the writer by what he observes or knows about a place.

At one end of this spectrum Blanton places the “object-bound” journey accounts of sailors, pilgrims, and merchants whose trips were inspired by necessity or well-defined purpose: exploration, devotion, or economics (:3). In these accounts he sees faraway people and places described in what is taken by the narrator to be a factual, disinterested way, while the narrator’s thoughts and reactions are hidden; as an example of the other extreme of this axis he presents Graham Greene's (1936) *Journey Without Maps* in Sierra Leoa and Liberia and his description of a return to childhood in the African landscape.

Leed (1991) approaches the pair in terms of a movement from fantasy to (intended) objectivity. According to him,

forms of the images (description, understanding, explanation, assessment and mediation) are treated in a similar way, allowing for the construction of an indicator of epistemological empathy towards otherness.

¹⁹⁴ Quoted in Lima de Matos (2007).

Seventeenth- and eighteenth-century travel writers were much disturbed by the traditional role of travellers as fictionalizers of the world and took great pains to establish a narrative style of description, which we have come to know as non-fiction – a narrative of truths, observations, and facts. (...) The journey, from the Renaissance on, became a structured and highly elaborate method of appropriating the world as information (...) The redefinition of travel as disciplined observation, as the science of induction and the art of description, effected fundamental alterations within travel literature in the seventeenth century. (:106).

The change from fantasy to (intended) objectivity was followed by a transition to subjectivity, according to some students of TW. Blanton (2002) holds that by the end of the eighteenth century

Enlightenment's fragile balance between science and sentiment begins to be replaced by the subjectivity of the romantic period, with a change from descriptions of people and places to accounts of the effects of people and places in the narrator. (:15)¹⁹⁵

For Cardinal (1997:136) the nineteenth-century romantic travel writer was “committed, impassioned, evocative and lyrical”, while Duncan and Gregory (1999) claim that

Romanticism marked a post-Enlightenment remapping of the space of representation: it de-throned the sovereignty of Reason and glorified unconstrained impulse, individual expression and the creative spirit. (:6)

These are tendencies broadly agreed upon by French scholar Pasquali (1994:xv), who maintains that critics of TW have highlighted the transformation, around the turn of the nineteenth century, from a narrative of discovery and adventure, in which the outside world and its mapping would be the principal motive to the narrative of an experience focusing on the traveller. Broadly agreeing, Cardinal (1997:136) has a different view in what regards periods, as for him Romantic travel started to decline in the late 1840's “with that post-Romantic mode of

¹⁹⁵ Blanton, as other authors mentioned below who hold this thesis, seem in fact to be saying that subjectivity (as they define it) was *added* to, rather than replaced objectivity (as they define it), as one cannot easily account the effects of people and places in the narrator (their definition of subjectivity) without accounting for people and places (their definition of objectivity).

journeying known as modern tourism”. Carr (2002:74), in turn, sees a change of this type taking place later, in the period from 1880 to 1940, and identifies a move from the realist text “often with an overtly didactic or at any rate moral purpose” to a more impressionistic style with the interest focused “as much on the travellers’ responses or consciousness as their travels”. She also stresses that in the twentieth century the scientific or scholarly text is usually written for academic fellows and, particularly in the case of ethnography, has tried to distance itself from what it sees as the ‘amateurism’ of travel (page 74). Blanton (2002:4) notes that in the works of twentieth-century travel writers, especially Graham Greene, V. S. Naipaul, and Bruce Chatwin, “social and psychological issues” are more important than facts about places and events¹⁹⁶, identifying in travel books like Greene’s *Journey without Maps* or V. S. Naipaul’s *An Area of Darkness* a “mediating consciousness that monitors the journey, judges, thinks, confesses, changes, and even grows” (:4).

Such subjectivity, in the sense of the manifestation of writers' feelings regarding what they experience in travelling, arises in late-twentieth-century travel as

the refusal of the authors to admit to know anything for sure. (...) What results from travel books like these is not smooth narratives that purport to deliver the truth about another culture but rather, as anthropologist James Clifford [1988] says [about twentieth-century academic ethnography] “a series of specific dialogues, impositions, and inventions”. (Blanton, 2002:95)

This tendency is identified by Gabriel (2002:152) in the TW of Haruki Murakami, one of Japan's most popular novelists, who according to him “share many of the characteristics found in this kind of contemporary travel writing: a concern for memory, a nostalgic sense of loss, as well as a foregrounding of the limits of knowledge and representation.” For some travellers, more than being negated, “reality” is even dismissed as a goal as “more and more travel writers are crossing that line between fact and fiction (...) the travel writer most attuned to this odd perspective (...) [being] Bruce Chatwin”, according to Blanton (page 65). Blanton sees Chatwin's *Songlines* “more concerned with Aboriginal nomad as metaphorical object than as ethnographic subject.” (:105).

¹⁹⁶ Considering the context, it would seem social issues mean here the personal perspectives of authors on certain issues affecting the collective of the societies in which they travel and write about.

Portugal and studies on TW and FLO

In Portugal, besides being absent from the domains of anthropology and sociology (this is almost the case elsewhere, as has been seen above), the study of TW has been rare within other areas. Lima de Matos (2007:33) finds it surprising that given the central role of the Portuguese maritime explorations of the fifteenth and sixteenth centuries and its representation in the “cultural History” of Portugal, only in the 1990s a cluster specifically focused on the subject arose within Portuguese studies.¹⁹⁷ He is speaking mostly of scholars Maria Alzira Seixo and Fernando Cristóvão, whose works were considered in this literature review but provided no relevant insights for the socially and sociologically oriented purpose of this study¹⁹⁸, the same comments applying to Martins (2010), who studies contemporary travel texts of Portuguese journalists with a linguistic approach.

A relatively recent study (Carvalho, 2003) analyses texts of the fifteenth and sixteenth centuries dealing with otherness through what it calls a “rhetorical and hermetical” perspective. With a work published in the same year, Vicente (2003) approaches the travels of the Portuguese King D. Pedro V to North European countries in the mid-nineteenth century focusing on cultural transformations than were taking place in the forms of travel and representing the world. Matos (1999, 2002) quoted above in this chapter, also deserves mention, albeit only her 2002 work regards TW and FLO about Portugal.

Aznar Pastor (2004:298) focus briefly (one page) on a work of the corpus being studied – Julio Llamazares's *Trás-os-Montes: uma viagem portuguesa* – noting that the author prefers the present to the past and that “he seems to be looking for the roots of his own identity by opening up himself to new horizons, both human and geographical” (my translation from the Spanish original). Andres-Suárez (2004:310-311) deals more generally with the travel writing of

¹⁹⁷ Contrary to what he finds in Portugal, Lima de Matos (2007:33) notes that (my translation from the original Portuguese) “the research on textual representations of travel is occupying an ever bigger space within several national philologies. Within the more specific realm of German studies (...) it can be observed, from the 1980's onwards, an exponential increase in the production of studies related with travel writing.” A linguistic barrier prevented the consultation of that corpus.

¹⁹⁸ Seixo, Maria Alzira (edit.) (1997), *A Viagem na Literatura*. Mem Martins, Publicações Europa-América; Seixo, Maria Alzira (1998a), *Poéticas da Viagem na Literatura*. Lisboa, Cosmos; Seixo, Maria Alzira and Graça Abreu (edit.) (1998), *Les récits de voyages. Typologie, historicité*. Lisboa, Cosmos; Seixo, Maria Alzira (edit.) (2000), *Travel Writing and Cultural Memory / Écriture du Voyage et Mémoire Culturelle*. Amsterdam-Atlanta, GA, Rodopi; Seixo, Maria Alzira (edit.) (2000), *The Paths of Multiculturalism, Travel Writings and Postcolonialism*. Lisboa, Cosmos; Cristóvão, Fernando (1999) (Coord.), *Condicionantes Culturais da Literatura de Viagens. Estudos e Bibliografias*. Lisboa, Cosmos.

Llamazares, holding that in *Trás-os-Montes* “the insertion of texts by authors of the country being visited allows him to include the voice of otherness and put down geographical and cultural barriers.” One should also mention Henn (2004) who studied the travel books of Camilo Jose Cela, another author included in the corpus being studied (*Nuevo viaje a la Alcarria*).

To some extent, each of this three studies (Aznar Pastor, Andres-Suárez and Henn) epitomise methodological issues common to many of the authors mentioned in this section and, in general, to analyses of TW and FLO: the vague / common sense nature of terms and concepts, implicit quantification (the presence of words or expression conveying quantity without actual figures being quoted, a notion developed in Annex A) and a non systematic, non exhaustive perspective¹⁹⁹. The present work tries to overcome such limitations (as per following chapter), but nonetheless some of the insights provided by such authors are worth considering as (working) hypothesis (specifically, Henn is considered on section 4.10).

¹⁹⁹ This is seen in phrases not empirically grounded such as “Overall, *Del Miño al Bidasoa* radiates a general sense of well-being” and “although some unpleasant characters and incidents do, from time to time, inject a few disturbing moments into the account, the overall picture that emerges is one of a society in which people are generally inoffensive and, quite often, affable and helpful” (page 123).

Chapter 3 – Methodology

3.1 – Summary

This chapter begins by discussing the importance and necessity of quantification and goes on to define the departing point of such process and of this study: the image of the social world. Attributes of the image of the social world are then defined (density, degree of generality, forms of knowledge and sources of knowledge) and statistics based on combinations of these are established, such as composite indexes considering both density and degree of generality, and epistemological empathy towards otherness (the latter based on forms of knowledge). Having been established through an interplay between theory, *a prioriness* and the texts, a set of themes is presented into which the images of the social world are classified. The dualities traditional society/modern society and humanism/cultural relativism are also operationally considered in such a way as to allow quantification whenever possible.

3.2 – A quantitative perspective on FLO vis-à-vis other types of academic analysis

Overall, this study follows an approach that is both quantitative and qualitative, two aspects which are not clearly separable. The qualitative approach is present in the definition of categories aiming at identifying the images of the social world conveyed by the corpus and other structural features of the corpus, as these categories are established in interplay with the texts (as detailed below in this chapter). The process amounts to content analysis in the sense of “a technique that is applied to non-statistical material and [that] allows the researcher to analyse such material in a systematic way” (Finn *et al*, 2000:134). The quantitative approach consists in the analysis of the data thus produced by resorting to variables usually seen in quantitative studies, including quantity, frequency, density and similar statistics (as detailed below) which, according to Hoover (2008) are common in quantitative analysis of literature. The 9 works comprising the corpus are then compared using these criteria (statistical results are fully described in Annex B) and the corresponding regularities and singularities are highlighted in chapter 4, where the qualitative approach thus resurfaces in the analysis. Chapter 5 makes interpretations of these results

according to the literature reviewed in the previous chapter and, again, both approaches are intermingled.

Quantification is considered especially important because of its potential to overcome what is seen as a methodological flaw of many literary/”critical” studies on TW surveyed in the previous chapter: implicit quantification, or the presence of words or expression conveying quantity without actual figures being quoted. Illustrating the relevance of quantitative literary analysis by resorting to excerpts from by Virginia Woolf's novel *To the Lighthouse*, Hoover (2008) holds that

Examples are rarely significant (...) unless they are either unusual or characteristic of the novel or the author — otherwise why analyze them? And the unusual and the characteristic must be validated by counting and comparison: the bare claim that Woolf uses a great deal of personification [of objects] is without value and nearly meaningless unless it is quantified.

The issue is also found in significant amount in two of the most important works dealing with TW in the field of Humanities: Pratt (2008(1992)) and Said (1978)²⁰⁰. There are of course non quantitative analysis of written works (such as Edmondson (1984), a sociologist who identifies and describes rhetorical mechanisms used in sociology texts, and Sharp (1999), focusing on FLO, as as seen on previous chapter) which do not engage (so heavily) in implicit quantification. It should be noted that the critique does not aim at generally at qualitative methodologies, but at the use of quantitative propositions without making the quantification process explicit.

Quantification has its disadvantages: it necessarily entails loss of information and there is subjectivity in the codification process. These disadvantages, however, would be common to any qualitative synthesis that would be short of “drawing a map the size of reality”. On the other hand, the explicitation of the quantification process has the advantage of making subjectivity more evident, exposing the method to peer-review and showing more clearly how and up to what point results and conclusions depend on method.

Finally, despite trying to always perform a quantification that is explicit, this study does not endeavour to test empirically causal relations that would try to explain certain features of the

²⁰⁰ They were the two most quoted works in Google scholar when a search on “travel writing” was performed as of May, 25th 2011. See Annex A for a quantitative proof of the presence of implicit quantification.

works being studied based on external conditions (as detailed in the introductory chapter). This is because the size of the sample would not allow the establishment of correlations of the sort (as seen also in the introductory chapter, there are specific reasons for considering only 9 works, *inter alia* the necessity to perform a deep analysis of each). Some suggestions are, however, provided in this regard and some theories are shown not to be working in the corpus at hand.

3.3 – Images of the social world

The basic element of the analysis performed in this study is the *image of the social world*, defined as information about someone or something (a person, a group of persons, a culture/society/people or a geographical entity) in *one* of its social aspects (a piece of information regarding *n* different social aspects of an entity is considered as *n* images of the social world).

Social is implicitly defined in Max Weber's (1968(1922): volume 1, page 4) concept of social action:

We shall speak of '**action**' insofar as the acting individual attaches a subjective meaning to his behaviour – be it overt or covert, omission or acquiescence. Action is 'social' insofar as its subjective meaning takes account of the behaviour of others and is thereby oriented in its course".

Durkheim (1982(1895:59)) defines **social fact** as

every way of acting, fixed or not, capable of exerting on the individual and influence, or an external constraint; or again, every way of acting which is general throughout a given society, while at the same time existing in its own right independent of its individual manifestations.

Despite the much studied and debated differences in the methodological approaches of Weber and Durkheim, and the emphasis of Durkheim on a dimension transcending the individual, both their implicit definitions of the social can be considered for an operational overall definition. **Social** is thus here defined as human actions or omissions and/or its results which are charged with subjective meaning, and as influenced by as or influencing other humans, directly or indirectly – real, implicit or anticipated terms; in terms of rebellion, restraint, potential or prohibition, *inter alia*. Besides the actual behaviour of people, this definition can thus include reasons for their behaviour (e.g. the influence of other individuals, groups or cultural norms) and

even physical results of and physical influences on behaviour, such as human-made artefacts²⁰¹ or other parts of the physical world to which humans attribute meaning or use (e.g. totemizing or animal husbandry).

This can in fact can include almost everything one (or more) human being does, abstains to do, thinks or abstains to think except for some physiological functions which s/he does not control directly (e.g. digesting, defecating) – and even these even can be influenced by others (e.g. peer pressure generating psychosomatic effects). Besides that, even the act of retiring from the (social) world or the situation of retirement in itself can be deemed social because if it is made against society and because the social world would always be embedded in the thoughts/habitus etc of the hermit.

As such, a **social image** in this work is considered almost any information which does not regard nature (in as much as these nature is presented as not being under the influence of or as influencing people), the mere description of travel (phrases with structures such as “From place A, I went to place B taking X mode of transport”) or the feelings of the travel writer (in as much as these do are not articulated as directly influenced by the actions/omissions/attitudes or the observation of these in the areas travelled).

Such broad definition has the advantage of including notions of the social that are perceptible by the reader and not only by the social scientist.²⁰² This is important because one of the goals of this work is to capture the portrays of Portugal and Spain present in the corpus which might produce social effects (as seen in section 1.4 above), making it necessary that such portrays correspond as much as possible to those constructed by the reader (as defined on section 1.5) in her/his act of reading (other possible sources of representation not being *a priori* excluded).²⁰³ Additionally, the study also considers images which might not be deemed relevant or captured by a common sense reading of the corpus (and for that matter, as detailed below,

²⁰¹ As Weber (1978(1922:7) holds, “to be devoid of meaning is not identical with being lifeless or non-human; every artefact, such as for example a machine, can be understood only in terms of the meaning which its production and use have had or will have for human action.”

²⁰² As it can be seen below in the description of the themes found in the images of the social world identified in the corpus, all images of the social world are considered perceptible by the internal (or scientific) perspective. This is of course a necessary result of the fact that the themes were themselves established within the of internal (or scientific) practice of producing this thesis. Within such perspective there is room, however, for themes with non-scientific content (such as “medieval” or “authenticity”), which are identified from a meta-perspective denoted by the use of inverted commas, as further explained below in section 3.10).

²⁰³ In section 3.10 below it can be seen that the overwhelming majority of themes identified in the corpus can be considered perceptible by the reader. This is of course expected given the genres travel writing and factual literature on otherness are directed to the reader, not to the social scientist.

other dimensions of the corpus such the number of images per number of words of the work; the extension of the images; the pair traditional society versus modern society or the pair humanism versus cultural relativism), and which therefore might not produce effects on readers. These non-commonsense images are nonetheless important in themselves for the study of the writers here considered and writers in general, who are of course themselves part of the social world.

Besides sociology, anthropology, political science, economics and related fields, social science here includes psychology at large in as much as some images of the social world considered refer to (personality) traits or behaviours which in science are usually ascribed to single individuals (although writers within FLO often ascribe them to larger groups, including namely national groups).²⁰⁴ It is assumed that the psychological dimension is also social in as much as the frontier between the social and the psychological, although most often obvious in terms of academic institutions, has never been much clear (for example, individual traits or circumstances depend on the social world on its formation, actualization and even transformation).

3.4 – Principles and rules for identifying and quantifying the images of the social world

Given the high number of images of the social world identified in the corpus (1,294, as detailed in the next chapter) it would not be practical to quote and justify every excerpt of text that gives raise to each of such images – and it would be much less practical, of course, every excerpt of text *not* giving raise to one of such images. Therefore, below are presented and discussed the principles and rules followed in reading of the corpus when searching for images of the social world (and as detailed below, also when searching for cases within other categories such as forms of knowledge, sources of knowledge and others) and examples are provided. Those principles and rules were defined through interplay between the theoretical definition presented above, assumptions regarding the act of reading, and the very practice of identification:

1) No necessary biunivocal correspondence between excerpts of text and images

²⁰⁴ This is relevant in the case of some images that are categorized in one or several of the some given *themes* (some of which include both social and psychological dimensions). Examples are:

- intolerance/intransigence/prejudice/discrimination; soberness/restraint/conservatism;
 - anguish/sadness/melancholy/unhappiness/dissatisfaction/tension/tedium
 - innocence/idealism/nostalgia; arrogance/pride; egotism/egocentrism/greed/envy;
- innocence/idealism/nostalgia - absence/low level.

In general, each image of the social world derives from just one excerpt of text. Still, there are in the corpus cases where different excerpts convey the same image; in these cases, only one image is considered. As a rule, when an object/entity produces two or more images having *the same theme* (a concept defined in detail below in section 3.9), only one image is counted.²⁰⁵ On the other hand, the same excerpt of text can give rise to more than one image of the social world²⁰⁶, including the possibility that the same excerpt conveys a theme and its contrary.²⁰⁷

2) Only images of the contemporary are considered

Contemporary is here defined as roughly the time, or the epoch in which the author has direct contact with otherness, contrasting with the introduction in the text of images about the social past of otherness (a very significant characteristic of some works of the corpus, as it is seen below). It should be noted that some images of the social world give rise to theme *past*; this does not mean that they refer to another time, but that the authors, in various ways, consider some aspects of what they experience of the present social world as identical or resembling the “past” as they define it.²⁰⁸

3) Avoidance of ambiguity and reification

Generally, ambiguous cases are not considered images²⁰⁹. At the same time, as argued above a loose definition of social is used, trying to emulate common sense²¹⁰. The assumption of

²⁰⁵ For example, when Camilo Jose Cela refers several times to a nuclear power plant, this amounts to just one image of the social world, as the author is referring to the same object and this object is interpreted as conveying the theme *modern technology* in every instance. In Julio Llamazares' *Trás-os-Montes* several descriptions sharing the theme *agriculture* refer to different locations, entailing therefore different objects and thus generating different images. In contrast, in Paul Hyland's *Backwards Out of the Big World* the expression “we have been so big, now we are so small” referring to (voices of) the Portuguese people – which is used 8 times – is considered as a single image. Following the same principle, in Richard Hewitt's *Driving Over Lemons* several descriptions of the Andulucian farm where the author lives are considered also a single image.

²⁰⁶ For example, there is a passage in *Uma Casa em Portugal* (page 121) where (a) the lack of punctuality and absenteeism of workers is justified with (b) the importance of family. The passage contains therefore two images: (a) (these behaviours are coupled because they are considered part of the same phenomenon) and (b).

²⁰⁷ For example, in *Last Old Place*, Datus Proper claims, talking of Lisbon that “Real people lived there. (...) They had not been squeezed into the suburbs, not all of them, not yet.” This contains, according to the framework for classification of themes used in this study (detailed below) the themes “*authenticity*” and “*authenticity*” - *absence / decay*, that is, two opposite images of the social world.

²⁰⁸ For example, in page 14 of *Uma casa* one reads that “Portuguese workers (...) lived in another century”. This is taken as a case of (the theme) *past*.

²⁰⁹ The following are cases of non-images. In *Backwards Out of the Big World* one reads about the city of Castelo Branco: “As I climbed I penetrated a world grown increasingly narrow, dense, medieval.” (page 115) Considering the adjectives preceding the word “medieval”, the author seems to be referring to the physical, not the social contemporary space, this impression being reinforced by immediately subsequent phrases: “I came upon (...) Square

the point of view of the reader entails a third principle of sticking to the text and trying to avoid applying to it speculative, long-chained reasonings which might amount to (excessive) reification.²¹¹ This does not prevent certain operations of abstraction, namely to see in a description a case of a broader phenomenon, which one may assume a reader may perform²¹². An extended case of this is looking into texts through the pair traditional society/modern society – in this case assuming only the point of view of the researcher²¹³.

4) No double counting of different degrees of generality²¹⁴ referring to overlapping objects

If one image refers to an object that is encompassed by another object with a higher degree of generality and associated with another image, only one image is counted.²¹⁵

5) Consideration of extension

of Straw (...). Beyond it, houses grew smaller in streets named for pottery workers, furriers, horsemen, small birds". In *It's not about the tapas* Polly Evans writes "put the deluded Don Quixote and the earthy Sancho Panza together, and there you have Spain" (page 291) when talking about Cervantes' famous work, with a degree of ambiguity / vagueness apparently insurmountable in what comes to locating the excerpt as an image/theme of the social world. Elsewhere, the same author performs a seeming contradiction which does not provide room for an interpretation as a coherent image of the social world within the would-be theme population or population dynamics: "Salar, on the other hand, seemed to be a large, sprawling, moderately ugly town whose most promising signs of life were two unwashed children sullenly kicking a deflated football" (page 178). Author Camilo Jose Cela sees "the burning of History" (page 234) as one of the problems of Spain. Although the metaphor could be easily interpreted as "not paying enough attention to History", the meaning of this interpretation in terms of a theme is not clear, as it would not be easy to reply to question "What is 'forgetting History' a case of?".

²¹⁰ For example, in *Uma casa* (page 45), the expression "where time had stopped" is taken a case of *absence of (social) change* and, as such, an image of the social world.

²¹¹ This restraint regarding interpretation was applied to the following excerpt from Paul Hyland (page 255), who is quoting Portuguese writer Eça de Queiroz: "He defines Portuguese characteristics (...) [as] 'underlying melancholy, vanity, desire to shine; everlasting hope for a miracle; attachment to the ancient family home, sudden departure for Africa'". Here, "attachment to the ancient family home" and "sudden departure for Africa" cannot clearly be categorized into themes, so they are not considered images of Portugal. (It is not the fact that Queiroz was writing in the nineteenth-century that excludes them, because Hyland presents them as perennial).

²¹² In page 57 of *Uma casa* the author falsely proclaims holding certain professional experience and professional certificates in order to impress local authorities, which is deemed as an (implicit) image of *bureaucracy (in excess / negative) / formality*.

²¹³ In Datus Proper's *Last Old Place* (page 234) a young woman in jeans is considered under the theme *individualism* due to the contrast, presented by the author in the same page, with a widow dressing black, behaviour explained as an "habit" by an informer. As elsewhere in the corpus where black "traditional" dressing is seen, this is considered a case of the *custom / ritual / "tradition"* (and therefore an image of the social world) from the perspective of the reader. In turn, *individualism* is a case of traditional society while *custom / ritual / "tradition"* is considered a case of modern society.

²¹⁴ The notion of degree of generality is detailed below.

²¹⁵ This happens, for example, in Franck Arencibia's *Paradox*, which contains a substantial number of images with a level 1 generality (lowest generality) which are used to illustrate propositions with level 2 or level 3 (higher generality). It is considered that what is being in fact conveyed – and it is assumed that the external perspective of the reader also notes this – is the image with the higher level of generality.

It is considered that to measure the extension of each work of the corpus for the purpose of working out the density of images of the social world and of other features of the texts (such as density of the forms of knowledge, which are dealt with below) the most appropriate measure is the number of words. This indicator was preferred to the number of characters given it is closer to meaning, but the issue loses relevance in the present study when one notes that, within the corpus, the standard deviation in relation to the average in what regards characters per word (4.1%) is not large.

Images of the social world and images in a domain of the social world

The possibility of performing the above-mentioned operations of abstraction in a process that results in the identification of a theme distinguishes *images of the social world* proper from **images in a domain of the social world**, as for these latter no such operations can be performed. Although some excerpts of the corpus can be considered as somehow conveying information about a social world, they cannot be categorized in a theme because context or other type of further information is missing²¹⁶. The opposite can also be true, in as much as without contextualization and/or other information an excerpt of text could be an image of the social world, but with it becomes a mere image *in a domain of the social world*²¹⁷.

²¹⁶ This is generally the case with the quotation of statistics without inserting them in a time series or cross section analysis/commentary, a process which Franck Arencibia uses frequently (see section 4.9). In another example, in *Nuevo viaje a la Alcarria*, Camilo Jose Cela names several types of honey produced in Alcarria region (:202), without mentioning any actual production and therefore not specifying if the production is e.g. subsistence oriented or market oriented/industrialized (which would be a way of considering the excerpt an image of the social world). Referring to Lisbon, Richard Hewitt, the author of *Uma Casa em Portugal* writes that “the coffee shops, the museums, the galleries were a civilized balsam for the growing rustic character of our daily lives” (:80). The opposition between “civilisation” and “rusticity” takes place within otherness; therefore, it is assumed this excerpt does not portray otherness as specifically civilized or rustic. In Paul Hyland's *Backwards Out of the Big World* the description of two young people kissing in a public space (:64) is not taken as a (clear) picture of the theme *liberal mores* (the most obvious candidate into which to insert the description). In the same work, the classification of Lisbon as “exotic” (:11) is seen as irrelevant for the point of view of the social and the fact that a teenage girl wears a Campaign for Nuclear Disarmament badge (:128) only with further assumptions could be considered a social symptom – and might entail ignoring the assumption (possibly shared by many readers) that the political stances of teenagers (who may even be deemed not fully developed persons) are often a manifestation of rebellion rather than a coherent ideology.

²¹⁷ This happens, for example, in Proper's *The last old place*, (page 43), although the case for exclusion is not so clear-cut: «It was in one of the oldest and most low-lying of Lisbon districts. Everything about the area was so cramped that I kept ducking my head, as if even the sky hung low. (...) The buildings, had they been used for low - income housing in America, would have brought thrills of opprobrium to every decent journalist.” The image of *material want* (one of the themes used below) the second phrase conveys is diluted by the first one (which states implicitly that not all Lisbon is like that).

3.5 – Degrees of generality and density

The degree of the generality of objects of inquiry has been dealt with both within social science and studies on FLO. Referring to Clifford Geertz's essay "Deep Play: Notes on a Balinese Cockfight", Crapanzano (1986) points to the use of the **ethnographic present**²¹⁸ and claims the anthropologist never describes a specific cockfight, rather constructing "the Balinese cockfight" and interpreting such construction. On several quotations from the nineteenth-century, Said (1978:229) notes that the "'Arabs' have an aura of apartness, definiteness, and collective self-consistency such as to wipe out any traces of individual Arabs with narratable life histories." And based on an excerpt of an eighteenth-century TW work²¹⁹, Pratt (2008(1992):62) writes:

The initial ethnographic gesture (...) homogenizes the people to be subjected, that is, produced as subjects, into a collective they, which distils down even further into an iconic he (= the standard adult male specimen). This abstracted he / they is the subject of verbs in a timeless present tense. These characterize anything "he" is or does not as a particular event in time, but as an instance of a pre-given custom or trait (as a particular plant is an instance of its genus and species).

Nixon (1991:75) finds the issue in a study of V. S. Naipaul's *Among the Believers*, holding that

as a travel writer, Naipaul values the element of arbitrariness and is eager to convey the sensation of being a prisoner of fortune in a strange land. Yet, as a polemical travel writer given to broad cultural generalizations, he feels a strong impulse running counter to the first: the urge to transcend the limitations of the chance encounter.

The present study intends to perform an analysis of the corpus in this light as systematically and exhaustively as possible. Therefore, to each image of the social world a degree of generality is attached depending on the nature of the object the image refers to. This is based on the notion of stratified reality, which includes usually the so-called micro level (within which sometimes the individual level is distinguished, for example, as in Turner, 2003), the meso level and macro

²¹⁸ Examples are "the Balinese never do a thing in a simple way when they can contrive to do it in a complicated way"; "the Balinese are shy to the point of obsessiveness of open conflict".

²¹⁹ John Barrow's *An Account of Travels into the Interior of Southern Africa in the Years 1797 and 1798*.

level. The contents of each level vary with authors and the number of categories can be higher, as in Brante (2001), who proposes instead five **ontological levels** (international, interinstitutional, institucional, interindividual and individual). Given the purpose of this study is to identify images of the social world about Portugal and Spain also from the point of view of the reader, some adaptations to these typologies are made, namely in order to closer emulate what is deemed the analytical capacity of the reader in this regard, for which, it is assumed, Brante's framework would be too sophisticated. The result is the following three level structure (which avoids the use of the micro-meso-macro terminology, given its definitions contents do not perfectly match the definitions here proposed):

Level 3: Images which refer to a country, a people or a culture, or anything larger, as long as relevant for the Iberian countries (e.g. a reference to diplomatic relations between Portugal and Russia would be considered as level 3 for Portugal). This means Brante's (2003) level 5 (that is, the international, referring to “relations between elements such as nations, firms and multinational organizations, often dealt with in a global perspective”) is included in this level 3, which is made, then, of references to “Spain” / “the Spanish”, “Portugal” / “the Portuguese” and alike. Although not necessarily, level 3 can also match the ethnographic present (Crapanzano, 1986, above).

Level 2: Images which refer to a group of people, a community, a village, a city or similar. This includes instances in which face-to-face relations predominate and otherwise.²²⁰

Level 1: Images that refer to an individual, a thing or a concrete situation.²²¹

Ultimately, generality could suggest a position in an axis ranging from the postmodernist's opposition between small narrative and grand/meta narrative, depending on the distribution of images amongst the three levels, as is discussed in subsequent chapters.

²²⁰ Examples in the corpus are the many references of Camilo José Cela (*Nuevo viaje a la Alcarria*) to the demographic or economic situation of the villages he visits.

²²¹ The difference between this level and the others can be seen e.g. in Richard Hewitt's descriptions having as theme the predominance of the affective dimensions over the instrumental ones. They are level 1 because the author merely refers to cases in which this happens, as opposed to an excerpt where he talks, regarding the same issue, directly of the “intrinsic motivation of the Portuguese worker” (:96), a level 3 image.

Combining density and generality

In order to convey the overall epistemological investment/commitment of each author as regards the social worlds of Iberia, the indicator *density of extension of knowledge of the social* of each work is proposed, based on both the density of the images of the social world (number of images per, say, 1,000 words) and the corresponding degrees of generality. It is therefore calculated as an average density weighted by the degree of generality, that is, by summing the degrees of generality the images of the social world and then dividing the total by the number of words of the work. It is important to compare results at such level because a work showing high density of knowledge of the social and high average generality (being therefore rather ambitious in its epistemological project) is quite different from a work showing a high density of knowledge of the social and a *low* average generality, and *mutatis mutandis*.²²²

3.6 – Forms of knowledge of the social world

Each image of the social is also categorized as *description*, *understanding*, *explanation*, *assessment* or *mediation* or included in two or more of these categories. *Description* is deemed an account of a social aspect of something or someone, according to the notion of social detailed above. The distinction between *explanation* and *understanding* has been dealt with by Dilthey and Misch (1924)²²³, being associated with the distinction between the core task of the natural sciences (to arrive at law-based explanations) and the core task of the human sciences (to understand human and historical life):

We explain through purely intellectual processes, but we understand through the cooperation of all the powers of the mind activated by apprehension (:172)

²²² The notion of epistemological investment/commitment can also be applied to the *forms of knowledge* and the *sources of knowledge* used by each author. This is detailed below, after the definition of such notions.

²²³ Quoted in Stanford Encyclopedia of Philosophy (<http://plato.stanford.edu/entries/dilthey/>).

This distinction is, though, insufficient for operating purposes and has been criticized²²⁴. Similarly, the interpretations made of Max Weber's (1994 (1897)) treatment of the subject are controversial and his approach is highly technical and complex for the purpose at hand. Therefore, Annex C deals with this in detail, and Weber (1994(1897)) is followed here only by and large.

Understanding is then considered an act in which a writer assumes, by attributing meaning in a *immediate form*, the (supposed) position of an individual or a group of individuals within otherness through the considering of their social present and/or past circumstances (a reasoning assuming the form "in doing X, the actor is doing Y")²²⁵. A broad correspondence between understanding and empathy is reached, then, if in the definition of empathy as "the ability to understand how someone feels because you can imagine what it is like to be them"²²⁶ one replaces "understand" by "realize" or similar verbs to avoid tautology.

Understanding differs from explanation in that the latter implies causality, i.e., the enumeration of events objectively external to the individual(s) (as opposed to the more or less permanent inner structures presupposed on the individual in understanding) without which social action would have not taken place ("the actor is doing X because of Z", Z being external to the actor). It is not implied, of course, that one cannot simultaneously understand and explain the attitude / behaviour of the same subject; in fact, both can be necessary to render a full account of a behaviour (e.g. "a person run away from the police because he had been a political prisoner and had incorporated an almost instinctive reaction to uniforms").²²⁷.

²²⁴ Brante (2001:footnote 8) follows Bourdieu (1996) in not endorsing it, calling understanding the psychological aspect of theoretical explanation.

²²⁵ Weber (1994(1897)) wrote that "the ability to imagine one's self performing a similar action is not a necessary prerequisite to understanding; 'one need not have been Caesar in order to understand Caesar'. For the verifiable accuracy of interpretation of the meaning of a phenomenon, it is a great help to be able to put one's self imaginatively in the place of the actor and thus sympathetically to participate in his experiences, but this is not an essential condition of meaningful interpretation." (quoted in www.marxists.org/reference/subject/philosophy/works/ge/weber.htm). The definition of understanding used in this study partially differs from Weber's in as much as it sustains that one needs to imagine one's self performing a similar action to the one performed by the actor being understood.

²²⁶ <http://www.macmillandictionary.com>.

²²⁷ The following examples of understanding taken from the corpus (and comprising a large part of all cases, which total only 14, as per Annex B) fit the formula "in doing X, the actor is doing Y" rather than "actor is doing X because of Z", Z being external. It is interesting to note that, as with Weber's examples of explanatory understanding, they do not seem to need an *external* element of *explanation*, stemming more from an act of empathy than from rational inquiry.

Having made a verbal agreement to hire a construction worker and being offered a cigarette, Richard Hewitt presumes the "ritual" is necessary to seal the deal and imitates the worker as he inhales once, throws the cigarette to

Another distinction to be made clear within the forms of knowledge is between *understanding* and *mediation*. The latter consists in rendering in the text voices of otherness (as postcolonialists and others prescribe for anthropology, see literature review chapter). Given that, in some cases the reader might not be able to grasp the meaning of a given *mediation* because it is not necessarily rendered in his own terms (it might be, say, a mere quotation of the discourse of a local). This opposes *understanding*, where the writer is careful enough to present the point of view of otherness in such a way that as to understandable to the reader, despite the cultural distance that might separate him from the person being quoted.

Assessment takes place when, taking into account the relevant context, it can be considered that an author or a native: a) makes a commentary on an image of the social world manifestly stating his approval or disapproval of the contents of such image by using terms such as “absurd”, “irrational”, “unacceptable”, “inappropriate”, “bad” or its antonyms as well as similar terms and expressions; b) performs a comparison between an image of otherness and his own society, his/her own values or those of his/her society or, more generally, uses some benchmark

the ground and immediately steps on it (:77). Similarly, at a police station Hewitt refuses a cigarette and is looked upon in a way that “obviously questioned my virility” (:207).

Arriving at a house where she booked a room in advance and seeing the surprise of the owner when she apologizes for being “so late”, Poly Evans (:40) makes sense of such reaction by reference to disregard for punctuality as a cultural trait.

Being informed of a tradition that if the water of Tagus river reaches the level of a certain image of a saint in the town of Santarem, Lisboa will be destroyed, Paul Hyland ask confirmation of these to a local woman, who looks at him “as if I was some sort of superstitious freak” (:103) thus conveying at the same time an image of rationality (as per the classification of images of the social world performed above).

In its turn, Datus Proper (:234) muses “if I had confessed to releasing good-sized trout; the Upper Brokers [his rendering in English of the designation of the inhabitants of a village in the North of Portugal] would have thought me frivolous [note the absence of *actual* (social) action here]. They eat nature. They are nature”.

Chris Stewart (65) speaks of his and his wife’s “ridiculous and embarrassing worldly goods” when downloading them from a vehicle before “the occupants of the few houses nearby [who] had gathered to pass muttered comments on each item as it emerged. ‘That must be their pig-killing Table.’ ‘No! Do they really use things like that over there?’” Here, the act of understanding goes further by imagining the attitudes / behaviours of those being understood.

In the town of Jaca (and elsewhere in her book), Poly Evans uses a similar mechanism of attribution: “Excuse me, *señorita*,’ they seemed about to say, ‘but this is the sixth time you’ve strolled down this boring little street, peered into that tacky shop window and read the hackneyed jokes painted on the tasteless ceramic olive jars. And it’s siesta-time, *señorita*. Decent people don’t wander the streets during the siesta.”

Referring to “Reina”, a transvestite in Madrid, Miranda France claims that “she might have been happiest in lambswool and pearls working as a secretary and meeting friends for Chit-Chat. Reina’s tragedy was that the only way to approximate her feminine ideal was to parody it – to peddle it, in fact.” (12-13). In one of his many negative assessments of Spain, Franck Arencibia shows a rare case of understanding toward the Spanish by assuming their position: “Spaniards don’t mean to be cruel. This is just the normal way they treat people.”.

As a final example, in finding on a wall of a village a broken plaque celebrating him, Camilo Jose Cela (:251) writes that the act was performed by “outside tourists. Village kids don’t do this kind of things.” (my translation of the Spanish original).

(implicit or not) by using expressions such “this is better than” or equivalents and its opposites or by doing this implicitly; c) presents images that are categorized in *themes* that can generally be deemed negative or positive from the point of view of the reader (in the definition of reader provided above).²²⁸

3.7 – Epistemological empathy towards otherness

This concept intends to help answering the question “Up to what point each author invests in forms of knowledge conducive to getting close(r) to otherness not on aesthetical or emotional grounds (or other) but in terms of knowledge and how does s/he compare to his colleagues in this regard”? As detailed below, it does so by working out an indicator of the use of forms of knowledge other than description (in terms of density to account for variations in work extensions).

Despite that some overlap exists between the concepts of sympathy (in the sense of “agreement with or approval of an opinion or aim”) and empathy (“the ability to understand and share the feelings of another”²²⁹) or “the ability to understand how someone feels because you can imagine what it is like to be them”²³⁰), epistemological empathy should not be confused with such notions. Contrary to epistemological empathy and sympathy are attitudes/behaviours that do not (necessarily) involve an epistemological dimension; they are performed in dissociation from images of the social world and can be inferred directly from attitudes/behaviours of authors rather than from the representations they make of otherness²³¹.

²²⁸ In section 3.10, below, the full list of these themes is presented, as well justifications and rules for their inclusion and exclusion. For now, it is sufficient to present themes deemed general positives and themes deemed general negatives.

Positives are: material competence / capacity; satisfaction / peacefulness / fulfilment / happiness; rationality / reflection / precision; (well-functioning) democracy; regard for law, rules, institutions; immaterial greatness / superiority; health - good; harmony / integration / tolerance / (absence of conflicts and/or their resolution); development / material prosperity; capacity to be “reasonable” / have “good sense”; authenticity.

Negatives are: rationality / reflection / precision - absence / low level and superstition; material incompetence / incapacity; anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium; political instability; material want / underdevelopment; disregard for law, rules, institutions; intolerance / intransigence / prejudice / discrimination; incapacity to be “reasonable” / have “good sense”; health - problems / damaging behaviours; egotism / egocentrism / greed / envy; ecological conscience – absence; decay (generic); conflict / violence / aggressiveness / rudeness / absence of integration; authenticity - absence / decay; affective incompetence / incapacity; coldness / insensibility; “underdevelopment” / “Third World”; “cultural identity” - absence / low level / decay.

²²⁹ Both meanings are taken from the Compact Oxford English Dictionary, available at <http://www.oxforddictionaries.com>.

²³⁰ <http://www.macmillandictionary.com>.

²³¹ For example, as is seen below in the individual analysis of *Tras-os-Montes*, author Julio Llamazares shows up as sympathetic towards otherness on several occasions.

For quantification purposes, epistemological empathy is assumed to be positively correlated with the frequency of the forms of knowledge explanation, understanding and mediation. This avoids the use of the degree of positiveness or negativeness attached to each writer's representations of otherness (which are worked out below, as they are interesting *per se*). It is necessary not to base the calculations of epistemological empathy on positiveness or negativeness because it is assumed that different social worlds will (tend to) make different imprints in FLO. Given the horizons of expectation of the genre entail a pact of factual reading (section 1.1), even an author who might have *a priori* an extremely positive attitude towards otherness can end up by portraying it in a negative way if faced with a negative reality, so that such epistemological empathy towards otherness cannot be captured in such a way.

For this reason, cases of description should have no influence on the epistemological empathy index: such form of knowledge consists of presentations social worlds deemed (see introductory chapter) as existing by themselves, apart and independently of the senses and the mind of the writer, albeit not immune to the relations established between travellers and locals, which maybe be a source of transformation of otherness. On the other hand, description can be considered epistemologically poor(er) than the other forms of knowledge, at least in its visual subform, which is overwhelming within description in the corpus²³². As Curtis and Pajaczkowska (1994:207) argue, tourists, who have a “primarily visual relation to reality”, “are deprived of effective dialogue with the human, cultural or natural environment”. Further, Siegel and Wulff (2002:110) remember that

while a culture's “reality” appears seductively accessible via vision, the traveller's view is always partial and biased. The vast number of unconsciously learned and assimilated beliefs, values, and norms that make up cultural patterns, the “mental programming” of any culture, remain veiled.

Pratt (2008(1992):150), in turn, refers to the views of inhabitants of the Andes by European travellers of the nineteenth century in the following way:

²³² As per section on correlations on Annex B, the correlation coefficient between the form of knowledge *description* and the source of knowledge *observation* (sources of knowledge are detailed below in this chapter) is 0.96; also, *description* shows no significant positive correlation with any other form (*mutatis mutandis* for *observation*). This means that almost all cases of *description* are derived from *observation*, which is primarily associated with looking.

One needed only to see a person at rest to bear witness, if one chose, to the trait of idleness. One needed only to see dirt to bear witness to the trait of uncleanness. This essentializing discursive power is impervious until those who are seen are also listened to.

Contrary to description, instances of understanding, explanation and mediation must have positive impact on the index, while the act of assessing is less straightforward in this regard. First, assessments can be performed by local people, being then cases of mediation as well (and being counted also as such in the quantification of forms of knowledge as per principles established above). Given these mediation + assessment cases are already included in the calculation of the index via the counting of mediation cases, only the cases of assessment with no mediation are to be considered. Second, and most importantly, the status of assessment in terms of epistemological empathy is not clear cut: on one hand, it can be considered as revealing lack of empathy towards otherness because it is imposing a benchmark on it (either explicitly or implicitly); on the other hand, the orientation to assess might be guided, e.g., by a desire to demolish what an author considers to be negative myths about otherness. For this reason, two alternatives of calculation of the index are considered: one in which the presence of assessment reduces the value of the index; and another in which assessment is neutral.

The index is then calculated as a weighted average. This means considering for each author the density of cases of each form of knowledge relative to the other authors (the percentage of each author in relation to the average for all authors is therefore used), and applying a weight corresponding to the relevant form.²³³ Given the desired neutral impact of description in the index, its weight is to be zero, meaning it is not be considered, while mediation and understanding are considered the strongest cases of epistemological empathy, followed by explanation.

Such assumptions are made on the grounds that mediation has the power to convey discourses of otherness which can even oppose an author's view (albeit not necessarily, as s/he can choose only those with which s/he agrees) and that in understanding it is also somehow the (supposed) position of otherness which is presented. Explanation is seen as less strong because it entails the search of a somehow universal causality which might go against local thinking and beliefs; further, it seems applicable to the sameness more so than mediation and understanding

²³³ The degree of generality is not deemed relevant here, because what one wants to appraise is not the extension of the images of the social world but the forms they assume.

which, it seems, would see their specificities diminished if their objects belonged to the same culture/society as that of the author.

Given the seeming symmetry between the act of mediating (to give voice without further intervene in knowledge terms) and assessment (high degree of intervention in knowledge terms, not only in the choice of assessment criteria but also in assessing properly), a scenario is considered where assessment has the same weight as mediation, but with a negative sign. The possibility that assessment might not be an indicator of lack of empathy toward otherness (as discussed above, its status in this regard is not clear) is considered in another scenario where assessment has a weight of zero.

In order to minimize the subjectivity involved in weighting (or at least aiming at making it clear) a series of alternatives are considered, each of which is associated with one of the scenarios just mentioned (that is, with or without assessment). Alternative 1 attaches a weight of 1 to explanation and a weight 5% higher to understanding and mediation. The subsequent alternatives maintain the weight of explanation and increase the 5% difference correspondingly to 10%, 15%, etc, up to 100%²³⁴, each increase meaning making the index more sensitive to the most emphatic elements of the index, mediation and understanding. In summary:

Table 3.1 – Scenarios for the calculation of epistemological empathy

| additional weight applied to mediation and understanding (%) | weight applied to mediation and understanding | assessment included | assessment excluded |
|--|---|---------------------|---------------------|
| 5 | 1.05 | | |
| 10 | 1.10 | | |
| 15 | 1.15 | | |
| ... | ... | | |
| 100 | 100.00 | | |

This amounts to 42 calculation scenarios (that is, $2*(100/5+1)$), the full results of which are shown in the graphics of section B.5, on Annex B. Relevant results are used the two chapters to follow.

²³⁴ 100% means that the weights for understanding and mediation are the double of the weight for explanation. There is no theoretical reason, of course, not to extend this parameter more, e.g. to 200%, but it is assumed this presents epistemological empathy in a wide variety of scenarios, allowing for sufficiently strong results.

Epistemological empathy and Leitch's scheme

As detailed in the literature review, Leitch (2009:3) sees writer Mark Twain as tending to assess otherness according whether he is a) a migrant (resorting mostly to the culture of otherness), b) a traveller (adopting “a reflective mode that acknowledges the distance between his culture and the encountered culture without necessitating particular judgment of that distance”) and c) a tourist (resorting to his own culture and establishing an “Olympian relationship” where his judgments are “not tainted by enmeshment in the world”). Epistemological empathy, therefore, is expected up to a point to translate empirically the difference between the tourist and the migrant: in principle, the higher the propensity of an author to engage in trying to know otherness, the more so s/he may be open to the culture of otherness.²³⁵

3.8 – Sources of knowledge of the social world

This study is exclusively focused on the texts of the corpus, not considering external information such as biographical data regarding the authors or their views on the process of experiencing otherness and writing about it. In what regards the overwhelming majority of the images of the social world present in the corpus it is possible, however, by assuming the point of view of the reader and the pact of factual reading of FLO to conclude from certain attributes of images (*inter alia*, the form of knowledge they assume) what would have been necessarily the corresponding source.

Each image of the social world is thus categorized as stemming from: *observation*, *reflection*, *informant(s)* and *indirect information (excluding informant(s))*²³⁶, or from more than one of these sources. ***Observation*** takes place when an author presents images of the social world s/he has gathered through direct experience²³⁷. Although *observation* is very much related to the form of knowledge *description* (as can be seen on the section on correlations in Annex B),

²³⁵ It should be noted that the use of the form assessment is not seen as distinguishing attitudes epistemologically close(r) to otherness within Leitch (he emphasises the *way* assessment is performed) nor within the theorization underlying epistemological empathy (that is why it is calculated both considering assessment and disregarding it).

²³⁶ Henceforth, unless otherwise noted *indirect information* always excludes *informants*.

²³⁷ More strictly, one could use the term *experience* instead of *observation*, but as it may vision is overwhelming in this type of books. The fact can be seen in the corpus at hand and in the use of the expression “libros de andar y ver” (“books of walking and seeing”) in Spanish to refer to travel books, a use which according to philosopher Ortega y Gasset comes from Arabic tradition (quoted in Padilla (2008)).

description does not always implies *observation* as source, as it can be derived from *indirect information* (e.g. other travel books or literature of fact; the media; statistics)²³⁸. In a broad sense, indirect information includes *informant(s)* – a source of knowledge that consists in a native of otherness talking about social aspect(s) of his life or of other partitions of otherness – but given the relevance of separating indirect information provided by informant(s) from indirect information gathered in a different way, *indirect information* is henceforth taken in a strict sense, that is, excluding informant(s).²³⁹

In *reflection* an author generates or expands knowledge about the social world by adding his or her view to information obtained through one or more of the other three types of source²⁴⁰. Therefore, each case of *reflection* is attached to an *image of the social world* that was previously and partially formed by *observation*, *indirect information*, *informant(s)* or a combination of these, on one side, and, on the other, by *reflection* proper.²⁴¹ (The non-inclusion in the corpus of works of journalistic and of essayistic nature which reflect in general and abstract terms on otherness (as mentioned in section 1.6) can now be restated more formally as the non inclusion of works where a significant percentage of images of the social world shows no source of knowledge besides *reflection* itself. Such works are then prone to the criticism that they make propositions on objects supposed to be real (the pact of factual reading of FLO obviously extends to the media) while at the same time it seems impossible to conceive of the epistemological

²³⁸ Table B.52 in Annex B shows that many correlations between the *epistemological investment* made by each author *in each form* (the product of the percentage of each form by the density of each form) and the *epistemological investment* made by each author *in each source* (the product *mutatis mutandis* for each source) are low or very low. This shows that there is no strict correspondence between forms and sources and that, consequently, they are not redundant vis-à-vis one another.

²³⁹ This distinction is especially important as, according to Montalbetti (1997), quoted in Besse (2004:160), the possession of knowledge *a priori* to the trip – “the mediation of the library” (“la mediación de la biblioteca” in the Spanish original) – distinguishes the tourist, “who cannot properly ‘see’ the journey” from the traveller, “who is erudite and knowledgeable.”

²⁴⁰ A subtle case of *reflection* takes place in Proper (page 124), when he talks about the bread baked in the family house of his friend Adriano: “It is utterly simple and relentlessly demanding, with no fat or sugar to trick the taste buds. There are no dough conditioners, emulsifiers, or preservatives, either.” The author does not limit itself to stating the observed characteristics of the bread, mentioning also about what it *does not* contain, suggesting an underlying model of a “regular” bread and therefore performing reflection by comparing.

²⁴¹ The exceptions are the cases where it is not clear which source(s) of knowledge, besides *reflection*, form the underlying *image of the social world*. This happens, for example, in Hyland (“Spain is grand. Portugal is modest.”, page 159), Arencibia (when claiming that Spain lacks “social identity”, page 64) and France (page 2), when asking if the nuns living in a monastery in Madrid, “many of them would have taken up their vocations when Spain was a dictatorship and the choices for unmarried women were limited” wouldn’t “felt cheated when they saw how women today could go out to work, or raise children on their own”. Due to such ambiguity, no other source of knowledge is added to *reflection* in these cases, which means assuming without justification that such other source(s) are not present. But as these cases comprise only 1.45% of the total number of sources identified in the corpus, this methodological weakness does not influence significantly the results.

processes by which the objects were connected to the proposition, the conclusion being that the process and/or the object do not exist²⁴².

In some cases, although it is not possible to attach an exact source (or sources) to some images, it is possible to attach them a **set of sources** (within which is not possible to affirm which one is more likely to have been the one actually used by an author).²⁴³ Although this is not much relevant in practical terms – 94% of images are clearly classified regarding its source(s), so that such **ambiguous sets** are not relevant, accounting for only 6% of the images of the social world – the important theoretical difference between an *ambiguous set* – e.g. indirect information *or* informant (it is not possible to say which is the actual source) and a **non ambiguous set** – e.g. indirect information *and* informant (it is clear *both* sources are present) should not be forgotten²⁴⁴.

3.9 – Composite indicators for forms and for sources of knowledge

The notion of **epistemological investment/commitment** of each author in each form of knowledge of the social is worked out through a **composite index**, being similarly worked out for each source of knowledge. It **combines density with the percentage of use within each work** (that is, the number of cases in which a variable assumes a given value divided by the number of total possible cases, e.g. number of images of the social in a book which assume the form description divided by the total number of images of the social in the book). Calculation of the composite index for form of knowledge A in work X is thus performed by multiplying:

²⁴² As in “Spain is grand. Portugal is modest”, on previous footnote.

²⁴³ These sets are: indirect information and/or informant; indirect information and/or observation; reflection and/or informant; and indirect information and/or informant and/or observation.

²⁴⁴ An example of a *non ambiguous set* occurs when Polly Evans joins a tour group “comprised [by] maybe a hundred people. Most of them were (...) middle-aged couples who had grown up in Franco's conservative, Catholic Spain with a healthy respect for the church and its trappings” (page 263). Here, it is not possible to dissociate *observation* from *indirect information* when (re) building the image: within the pact of factual reading of FLO, the middle-aged couples could not have entered the text without being *observed*; at the same time, their description would not be an image of the social world without the knowledge that they “had grown up in Franco's conservative, Catholic Spain with a healthy respect for the church and its trappings”, which was necessarily obtained from *indirect information*. *Reflection* could also be said to be involved as a source of knowledge here, as the author must have had to establish (possibly through observation) the ages of the members of the party in order to conclude the time in they had grown up.

Similar impossibilities of dissociation occur when Llamazares (page 93) classify Vila Real a “modern city” – this image is considered as arising both from *observation* and *reflection*, as it implies the use of a concept *a priori* to the experience (that of “modern”) – and, when the Spanish author describes a coffee shop as “a museum of itself” (page 97).

- as one factor, the density of form A (per 10,000 words) in work X as percentage of the average density of the corpus for form A (as per tables in Annex B); and

- as the other factor, the share of form A in total cases of forms in work X (in terms of density), as percentage of the average share for the corpus of form A in each work (as per tables in Annex B).²⁴⁵

This composite indicator adds information relative to its components in as much as an author, say, may show a high density of mediation within the corpus (first multiplying factor) mostly because his overall use of forms of knowledge is high, while shows a low percentage use of mediation in his text (second multiplying factor). *Mutatis mutandis*, the same method is applied in the calculation of composite indicators for sources of knowledge.

3.10 – The themes of the images of the social world

Each image of the social world identified in the corpus was categorized in one or more themes. This was an interactive process which began with a free categorization of each image; the different themes coming out from this process were then compared and aggregated or disaggregated as appropriate in order to avoid overlapping and inconsistency, and applied to the first set of images of the social world, generating adaptations, additions and eliminations. The process was repeated until no overlapping or inconsistencies were deemed existent, much in the same way as a theory becomes saturated when new cases and analyses no longer provide new knowledge relevant to the categories on which the theory builds (Ekstrom *et al*, 2001).

Overall, there is also an analogy with grounded theory, in the sense of “discovery of theory from data” – in contrast with “theory generated by logical deduction from *a priori* assumptions” (Glaser and Strauss, 1967:3) – or in the sense of “inductive theory generation” (in Ekstrom *et al*'s rendering of Glaser and Strauss). The difference is that the immediate goal here is not generate theory but stick to the first step (classification) by (following again Ekstrom *et al*'s presentation of grounded theory)

²⁴⁵ It should be noted that the multiplication of both factors without explicit use of weights entails of course the use of a weight of 1 for each multiplying factor. In the absence of a theoretical ground for assuming other weights, these default weights are chosen. Also, in order to maintain scale, and given we are multiplying two factors which have 100 as maximum value, the product is divided by 100.

systematically comparing different cases and clarifying their similarities and dissimilarities, [so that] concepts and categories are developed, providing new insight into a phenomenon.

The distinction between grounded theory and *a priori* theory matches to a significant degree that between emic data (produced by natives) and etic data (produced by researchers), but as argued in section 1.5 above it may not be easy to distinguish between the latter pair – and therefore between the former pair. Ekstrom *et al* (2001:136) warn that “coding without the guidance of theoretical concepts runs the risk of being short-sighted, shallow and naïve” and remind that empirical data is always categorized data, so it can be argued it involves always some degree of *a prioriness*, even when there is no such intention.

Further complicating the distinction, one aim of this study is to draw a systematic picture of the images perceived by the *reader*, a figure which is deemed a contemporary individual of the Western world, living in societies where reflexivity is high (Giddens, 1990, as developed in section 2.4).²⁴⁶ As such, an overlap might be expected between some common sense concepts arising from the texts of the corpus and scientific/*a priori* ones (albeit not in all cases, given the internal analysis necessarily entails concepts not used by common sense).

Thus, most of the process of theme identification was a simple exercise of abstraction/generalization, aiming at systematising the categories used by the writers (who by assumption write taking somehow into account reader's categories). Some of the most abstract themes found in the corpus (middle class; separatism; underdevelopment; custom/ritual/”tradition”; isolation/absence of cosmopolitanism; affective/particular - importance/predominance (over instrumental/universal); law, rules and/or institutions - disregard) result from the answer to the open question “What is this a case of?” applied to each image of the social world, a first step of the interactive process. *A fortiori*, then, the less abstract themes are even closer to reader/writer/emic categories, while not wholly deprived of a contribution from *a priori* categories, which are always present.

Description of themes

²⁴⁶ In fact, one does not need to presuppose much reflexivity capabilities on the reader/common sense to find common categories to the reader/common sense and social science, as illustrated by themes such as *emigration* and *tourism*: stating that these are significant in a society could be common to both perspectives (albeit the processes followed to reach such conclusions may be of course different).

For the sake of organizing description, the themes are clustered into 17 groups, with some belonging to more than one group (such clustering not being relevant for producing results). Inverted commas denotes either a) the direct voice of an author (e.g. when he speaks of “authenticity” or similar terms) or b) a collective or a common sense voice (e.g. “tradition” and “traditional” customs/rituals). Most themes, however, are not enclosed by inverted commas, being more indirectly inferred from the images of the social world. Examples of classification of images are provided for cases where such operation is not deemed a clear process, except for the themes with very little relevance in the corpus. Also for the sake of keeping the number of examples reasonably low, it is assumed that an example of classification into a theme also helps to clarify the process of classification of another image into the opposite theme.

RESTRAINT, MODERATION AND EXCESS

| | | |
|--------------------------------------|--|---|
| soberness / restraint / conservatism | | liberal mores / liberalization of mores |
| | harmony / integration / tolerance / (absence of conflicts and/or their resolution) | conflict / violence / aggressiveness / rudeness / absence of integration |
| | capacity to be “reasonable” / have “good sense” | incapacity to be “reasonable” / have “good sense” |
| modesty / low self-esteem | | excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude |
| | | arrogance / pride |
| | | intolerance / intransigence / prejudice / discrimination |
| regard for law, rules, institutions | | disregard for law, rules, institutions |

Some themes belonging to this group are in direct opposition. Being self-explanatory, they do not need specific definition, but it should be noted that the theme *law, rules and/or institutions - regard for* includes crime, corruption, dishonesty and reckless driving, among other similar attitudes or behaviours. Also, the cases of *liberal mores/liberalization of mores* in which the

image is actually static (belonging more properly to the subtheme *liberal mores*, then²⁴⁷) number 6 in a total of 11 cases of this theme. Of those 6, 3 cases derive from comparative statistics (Spain with the lowest marriage rate in Europe; leading in families with a single element; and high in teenager pregnancy and teenager abortion), from the affirmation of tolerance towards crime (Arencibia: 110) and “permissive” judges (idem:115)²⁴⁸ and from an image of the social world provided by Cela («a girl who is a friend, well, who has a pre-marriage relationship, as now people say, with a priest who one does not know if he is still a priest²⁴⁹ (Cela: 83).

INDIVIDUAL VERSUS COLECTIVE

| | |
|--------------------------------------|--------------|
| individualism | collectivism |
| egotism / egocentrism / greed / envy | |

Individualism “endorses the principle that the ends or purposes of the human individual possess dignity and worth that take precedence over communal, metaphysical, cosmological, or religious priorities” (Nederman, 2005²⁵⁰). In social terms, the concept can be seen as real manifestation of such principle, that is, as an orientation of a society towards the individual, opposing collectivism. Several authors have made use of this pair of concepts in developing theoretical frameworks or empirical investigations.²⁵¹

²⁴⁷ Subthemes are mentioned just for purposes of definition of themes. The quantitative analysis will focus only on themes.

²⁴⁸ The meanings of “tolerance” and “permissive” are obviously culturally and politically located, but it is presupposed that the reader does not take this much into account, assuming the two words have the meaning s/he usually attributes to them. Given this, they can be considered, in the context of dealing with crime, a symptom of *liberal mores*.

²⁴⁹ The classification of this excerpt as a case of *liberal mores* is not straightforward. If one assumes (that the reader assumes) priests do not usually engage in such behaviours, it can be seen rather as a case of *disregard for law, rules, institutions* on the part of the priest in question. In turn, this later interpretation could also be problematic: if the behaviour is explicitly taken as a single atypical case, it cannot be considered as representative of otherness and therefore it is not even an image of the social world. However, given the perspective here is on a whole text, even cases seen as rare/unique in themselves should be taken at face value as regards representation, assuming (that for the reader) their representativeness would depend on their frequency in the text (if rare/unique in terms of frequency, they would tend to be seen as rare/unique in terms of representation; if frequent, they could be seen as a significant trait of the culture/society at hand).

²⁵⁰ Nederman, Cary (2005), “Individualism”, in *New Dictionary of the History of Ideas*, retrieved April 27, 2012 from Encyclopedia.com: <http://www.encyclopedia.com/doc/1G2-3424300381.html> ((reduced quote and check bib))

²⁵¹ See Triandis (1993) for theory. In a worldwide study of 116,000 employees of I.B.M. performed in 1980, Geert Hofstede ((ref)), a Dutch psychologist, ranked 40 cultures according to the strength of individualism or collectivism. According to Goleman (1990), writing in the *New York Times* online edition, “new cross-cultural studies (...) contrast individualism with collectivism, in which a person's loyalty to a group like a family or tribe overrides personal goals. Recent studies say this outlook predominates in most cultures of Asia, Africa, the Middle East and Latin America.”

The theme *egotism / egocentrism / greed / envy* can be considered an extreme case of *individualism*. Although strictly speaking the qualities that comprise it are psychological, not social, they become part of a social picture of, say, a people, in as much as an author classifies the whole people as such (seeing it somewhat as an individual). Be as it may, the indicator extension of theme (which considers not only the quantity of images within a given theme but also the degree of generality of each image, as detailed below) captures these differences: an author who, within the axis individual vs. collective, mostly classifies a people through individual descriptions will have lower extensions than an author who, *ceteris paribus*, conveys images with a much greater degree of generalization. ((indicator not considered, delete phrase))

RATIONAL VERSUS IRRATIONAL / SPIRITUAL

| | |
|---|--------------------------------------|
| rationality / reflection / precision - absence / low level and superstition | rationality / reflection / precision |
| religion - decay / low importance | religion – importance |
| “tradition” and “traditional” customs / rituals | |
| “authenticity” | “authenticity” - absence / decay |

This group is also made of opposites, with the duality “*authenticity*” and its absence or decay appropriate also for inclusion in the group instrumental – affective (below). The use of inverted commas in tradition and traditional means that this is not a scientific use but a common sense use, as discussed in the literature review. Also as seen in literature review, the scientific **concept of traditional society (as well as its opposite, modern society)** is multidimensional and features a higher level of abstraction than themes; therefore, the process through which it can be inferred from the texts of the corpus is much more complex than the process involved in the themes presented in this section (either commonsensical or scientific). For this reason, the methodology to deal with it is quite different from the one presented in this section (and is presented in section 3.11 below).

Rationality / reflection / precision - absence / low level is present e.g. in the “impenetrable logic” Hewitt sees in the Portuguese people (:12), but the theme is also inferred more indirectly: for example, after criticising digging machines featuring rubber wheels, a local character in Stewart (:51) ends up by hiring one such machine, affirming: “You can't afford to be too fussy in these matters”. Several references to lack of punctuality make it ((?)) one of the most frequent sub-themes of such theme.

INSTRUMENTAL - AFECTIVE

| | |
|--|--|
| instrumental / universal - predominance / importance (over affective / particular) | affective / particular - importance / predominance (over instrumental / universal) |
| expressive / particularism - absence / low level | |
| affective incompetence / incapacity, coldness / insensibility | |
| society – <i>gesellschaft</i> | community / <i>gemeinschaft</i> |
| isolation / absence of cosmopolitanism | cosmopolitanism / no isolation |
| innocence / idealism / nostalgia - absence / low level | innocence / idealism / nostalgia |

Within this axis all concepts are deemed self-explanatory, except society and community (discussed in the literature review); it should be noted that these two concepts are components of the concepts of traditional society and modern society (also discussed in the literature review and in the corresponding methodological discussion below in this chapter). Briefly, **community and society** are used here in Tönnies's sense: small, relatively isolated integrated communities based upon primary relationships and strong emotional bonding versus the more anonymous and instrumental secondary associations of the modern metropolis, as per the exposition of these concepts by Featherstone (1995).

HISTORICAL TIME

| | | |
|------|------------|----------------------------------|
| past | “medieval” | “modernity” / “contemporariness” |
|------|------------|----------------------------------|

Once more, the expressions within inverted commas denote use by the authors in the corpus. *Past* is an encompassing concept denoting experiences in the contemporary otherness which an author deems belonging to a former period, either according to his personal background or at the level of (what s/he sees as) her/his sameness, reflecting a linear vision of History. This follows Lowenthal (1999)²⁵², who maintains that the actuality of the object (as opposed to a reproduction or a surrogate) attracts people and provides them a way of reaching the past. However, while emphasis on the past can be associated with a nostalgic mood, it should not be confused with the theme *nostalgia* (located within the axis instrumental – affective, above), as *nostalgia* refers here to a quality found by writers on otherness. The emergence of the past in a

²⁵² Quoted in Wikipedia.

narrative of a present journey can be found, e.g. in Graham Greene's *Journey without maps: a travel book*: "Liberia (...) is used by Greene as a site on which he can (...) experience a more primitive stage of his own culture." (Dodd, 1982:130). It is also seen in Nixon's (1991) notion of "**Conradian atavism**" a mechanism observed in the novella *Heart of Darkness* by which a journey forward through space up the river Congo simultaneously moves backward through time.

SOCIAL (IN)EQUALITY

| | | |
|-------------------|--------------|-----------------|
| social inequality | middle class | social equality |
|-------------------|--------------|-----------------|

Social equality and *social inequality* capture descriptions where elements which point to these concepts are present, with *middle class* capturing both the concept *per se* and the use of the expression by an author. (It is assumed that there is no relevant difference between scientific and common sense discourse regarding these three concepts, which makes it irrelevant whether the voice of an author in this context is considered within the former or the latter).

MATERIAL CAPACITY

| | | | | | |
|---|---|-----------------------------------|---|-----------------------------|--------------------|
| Modern technology - absence / low level | self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market | | non mechanized / subsistence agriculture | (non specified) agriculture | |
| Modern technology | industrialized production / mass market | industrialized production - decay | agriculture - absence / low level / decay | tourism (industry) | leisure (practice) |

Although this group of self-explanatory themes does not constitute an axis, there is a generic opposition between modern and pre-modern production/markets (in which, of course, the themes *(non specified) agriculture*, *tourism (industry)* and *leisure (practice)* do not fit). **Modern technology** is associated with technology contemporary or subsequent to the Industrial Revolution, which could generally be defined as obtaining its power from sources other than human or animal forces or other than energy in its primary form (e.g. wind as opposite to electricity). There is here, then, a contrast (common to all themes in this cluster bar the two last columns) between massified and non massified production processes (the latter being classified

by some views as authentic, as discussed in literature review above, section 2.3.) Finally, it should be noted that many *images of non mechanized / subsistence agriculture* in the corpus are images of (non mechanized / subsistence) animal husbandry.

MATERIAL SITUATION

| | |
|------------------------------------|-----------------------------------|
| underdevelopment / material want | development / material prosperity |
| “underdevelopment” / “Third World” | |

Here, “underdevelopment” / “Third World” denotes the use, by the authors, of these or very similar expressions, while the remaining themes are inferred from the images described by the authors.

SATISFACTION AND HEALTH

| | |
|--|---|
| good health | health - problems / damaging behaviours |
| satisfaction / peacefulness / fulfilment / happiness | anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium |

All concepts are also deemed self-explanatory in this axis. Health problems encompass mental health and alcoholism.

POLITICS

| | | |
|------------|-----------------------|------------------------------|
| separatism | political instability | (well-functioning) democracy |
|------------|-----------------------|------------------------------|

The concepts within this theme are considered self-explaining.

MINORITIES

| | | | |
|------------|-------------------|-------------------|------------------------|
| emigration | ethnic minorities | sexual minorities | otherness of otherness |
|------------|-------------------|-------------------|------------------------|

The theme *sexual minorities* is made of images of lesbians, gays, bisexuals and transgender people. *Emigration* refers to people belonging to otherness but who live elsewhere. ***Otherness of otherness*** encompasses immigration and other minorities besides ethnic and sexual minorities (e.g., hippies, religious minorities).

SEXUALITY

| | |
|-----------------------|--|
| sexuality / eroticism | sexuality / eroticism - absence / low intensity / low importance |
|-----------------------|--|

This category of themes makes up an axis formed by the importance of sexuality in a group or society.

GENDER

| | |
|------------------------|--|
| gender differentiation | gender differentiation - absence / low level |
|------------------------|--|

Similarly to the previous axis, this is structured by the degree of gender differentiation.

URBAN VERSUS RURAL

| | |
|-------------------------|--------------|
| rural / urban - overlap | urbanization |
|-------------------------|--------------|

Not making up an axis, this cluster of themes includes the identification of a rural / urban – overlap and a high level of urbanization.

POPULATION

| | | |
|--------------------------------|--------------------|--------------------------------------|
| population - recovery / growth | population decline | population - ageing / low birth rate |
|--------------------------------|--------------------|--------------------------------------|

This cluster of themes contains the axis population decline versus dynamic population evolution and, on another dimension, the ageing / low birthrate of the population.

TRANSFORMATION VS. ABSENCE OF CHANGE

| | | | |
|-----------------|----------------------------|--|----------------------------------|
| “social change” | (social) change - residual | (social) change - residual: absence / slow | “social change” - absence / slow |
|-----------------|----------------------------|--|----------------------------------|

As above, inverted commas denote the use of the expression (or very similar expressions) by an author. The brackets in ***(social) change*** are used to distinguish any transformation of social aspects (as defined *latu sensu* in the literature review) from specific uses of the expression (no brackets) which one sees in social science. The suffix ***residual*** considers the fact that *(social) change* without the prefix *residual* is a meta-theme encompassing some themes within other clusters, thus duplicating them. (For example, the theme *industrialized production – decay*

necessarily implies (social) transformation). (*Social*) *change – residual* is thus used to denote the categorization of images that have not been categorized in other themes implying (social) change.²⁵³

OTHER

| | | |
|-----------------------|-----------------|---|
| ecological absence | conscience - | “cultural identity” - absence / low level / decay |
|-----------------------|-----------------|---|

This residual cluster includes the claim, by an author, that a given collective has lost or is loosing its “cultural identity”. This could be seen as a loss of authenticity, but given a specific different expression is used by authors, the distinction is maintained in the production of statistics.

Further remarks on themes

The fact that some themes are particular cases of others is considered in order to avoid double counting. When an image of the social world is a case of two or more themes thus related, only the most concrete theme is counted. Given some themes might at first sight look not significantly different from others, some clarifications are needed. The theme *modesty / low self-esteem* is about relations – how people (or a people) feels in relation to other (even if the relationship is implicit) – while the group *anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium* is about feelings about oneself. Similarly, *intolerance / intransigence / prejudice / discrimination* implies active orientation towards the other while *arrogance / pride* is more general and passive.

Conflict / violence / aggressiveness / rudeness / absence of integration is broader (absence of integration being included here as a case of conflict) relative to *intolerance / intransigence / prejudice / discrimination*, which regards specifically difference and an imbalance of power in

²⁵³ As an example of application of these rules, consider the following example from Datus Proper: “There was a studio portrait of Adriano's parents on the shelf of the parlour. The photographer's victims were so camouflaged by the clothing of the period that they were difficult to see. Dressed normally, I supposed that they would have been much like the Portuguese of today - closer in habits and attitudes than my ancestors are to me. Portugal had more history, more resistance to change, and fewer resources for it.” The expression “closer in habits and attitudes” is taken as a description of absence of change, being a case of (*social*) *change – residual*. In “resistance to change” the author speaks directly of change, so there is a case of “*social change*” - *absence / slow*, but in order to avoid double counting of the conveying of change, only (*social*) *change – residual* is considered.

favour of the active agent performing the behaviours or assuming the attitudes in point. *Rationality* differs from *ignorance* in as much as is the capacity to process information, while in the case of the latter there is lack of information. The theme *non mechanized / subsistence agriculture is a particular case of the theme self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market*.

Of these 86 themes identified in the corpus, only three can be considered not directly perceptible by the reader (that is, faced with an image of the social world, the reader is not able to identify it as a case of the theme). They are *community / gemeinschaft* (the opposite theme, *society / gesellschaft* is not present in the corpus), the sixth most frequent theme in the corpus with 3.5% of total frequency; *affective / particular - importance / predominance (over instrumental / universal)*, 29th in rank, with 1.1% of the total; and its opposite, *instrumental / universal - predominance / importance (over affective / particular)*, 66th in rank, 0.2% of the total. Combined, these non perceptible themes account for only 4.8% of total frequency (although *society / gesellschaft* is relatively significant in this regard, as shown by its high rank location).

This shows that, in terms of each theme taken individually, the internal analysis does not differ significantly from the external analysis. However, there is of course a major difference in the method intrinsic produced by the process of systematic analysis that produces statistics (described in Annex B and discussed and interpreted in chapter 5). The reader is supposed to be somewhat sensitive to the frequency of each theme in the work at hand, but such sensitiveness is of course influenced by its personal experience and absence of systematization concerns – an important difference existing here between the ideal type and actual people engaging in reading, albeit the law of large numbers may dilute it up to a point.

Another important difference between the internal and external analysis regards density. In the latter perspective, the reader is assumed to convince her/himself that a society/culture (or a partition of it) has the attribute X the more theme X is present in the text *irrespective of the extension of the work*, that is, irrespective of the density of theme X. Therefore, if a book 1 about society/culture P contains a higher absolute number of cases of theme X than book 2 (also about P), it will tend to produce a greater impact in presenting the country as X than book 2. In contrast, besides considering density, the internal analysis attaches to each image of the social world a level of generality, so that the corresponding theme(s) is/are also characterized by such level of

generality.²⁵⁴ The level of generality of themes is relevant because it would not be the same if theme *X* was affirmed of an object with a level of generality 1 or of an object with a level generality 3: in the latter case, *X* is affirmed of a whole which encompasses all possible (level 1) concrete situations.²⁵⁵

The negativeness (/positiveness) index of the images of the social world

As can be seen above in the list of themes present in the corpus, some themes can arguably be deemed generally negative or positive in the sense that they seem to be considered undesirable or desirable irrespective of the cultural location of the observer or even of individuals. Extending Edmondson's (1984:113) notion of general topoi (a type of enthymeme “which outline what counts – at least in Western culture – as the basis of all valid arguing”), one could speak of universal topoi (deemed valid in all cultures). In fact, it seems fair to expect that such universality of the negative/positive themes considered below even transcends the humanism / cultural relativism divide.

An index of positiveness (or negativeness) of the images of otherness is therefore calculated as the difference between the number of positive themes (in terms of density) and the number of negative themes (in terms of density). Given that the value of the index of positiveness is negative for all authors, henceforth the indicator is referred as index of negativeness. Similarly to what is done with other indicators, this one is also worked out considering the degree of generality of the each image/theme, therefore producing an index of density of extension of negativeness. The principles and justifications for classifying some themes as negatives or positives are the following (with the classification of the unmentioned themes within this context being deemed obvious):

- If a theme is deemed negative (or positive), its opposite is deemed positive (negative).

This is, for example, the case with material *competence / capacity* and its opposite.

²⁵⁴ As an example one can consider France (page 1), which describes nuns living in a convent in Madrid (image). The theme is “religion – importance” and the degree of generality (both of the image and the theme) is 1, because the description corresponds to a concrete situation. (It could be argued in this case that, by following the principle that applies a degree of abstraction 2 to social images to cities and villages, a degree 2 should be chosen, given a community is being presented. However, it can also be argued that in this community face-to-face interaction is of much higher intensity and that it is clearly more contained than, e.g., a village, which is proved by the fact that convent communities can be contained within the physical space of villages and not the opposite)).

²⁵⁵ This happens in Franck Arencibia's work, where one finds often a general affirmation about Spain (level 3) and then several affirmations with lower levels of generality to support the more general one.

- Modern technology is not deemed more desirable than its absence, given it can be considered by some ideologies or groups as having, besides obvious benefits, undesirable effects (such as replacing manual work, alienating workers, generating job uncertainty and unemployment in the short run, increasing the pace of social change, etc). This principle implies that *non mechanized / subsistence agriculture* is also not classified as a negative (therefore being considered neutral), also on the grounds that subsistence agriculture does not mean necessarily an unbearable situation, having been the “natural” situation of Humankind throughout most of its History. Following the same reasoning, no valuation (either positive or negative) is attached to *industrialized production / mass market*, with the further assumption that a mass market society or situation is not necessarily seen better than its opposite.

- *Agriculture - absence / low level / decay* could be a sign not of outright decay, but of replacement with other activity (e.g. as in the process of industrialization), therefore no valuation is attached to it.

- The assessment of the themes *social equality* and *social inequality* seems ideologically charged (e.g. the position that supports the so called “equal opportunities” rather than social equality would not see theme this as a positive) so no valuations are attached to them.

- It is assumed that the absence of ecological conscience would be deemed negative by a reader from any culture, being seen as an attitude which does not take into account society (although that same reader might free ride by engaging in non-ecological behaviour).

- For their generality, the themes “*modernity*” / “*contemporariness*”, “*medieval*”, *past* and similar were considered neither negative nor positive on the assumption it is some aspects of these conditions (not the whole condition) which may be deemed negative or positive.

- *Liberal mores / liberalization of mores*: the definition of liberal or liberalization here is contentious in itself, the reason why no valuation is attached to this theme. The same applies to gender differentiation, where disagreement can even vary with the kind of differentiation one refers to.

- As discussed in the literature review, “*authenticity*” is a positive theme (irrespective of the external perspective considering it or not a reification). Loosely related to it, the theme “*cultural identity*” - *absence / low level / decay* is, by the same token, a negative theme.

- *Excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude* encompasses some traits which cannot be considered as universal negatives, so it has not been attached an assessment.

- *Modesty / low self-esteem*: low self-esteem would be possibly a universal negative, but modesty would be more contentious, so the pair is not ascribed an assessment.

- The theme *rationality / reflection / precision - absence / low level and superstition* is considered negative on the grounds that a reader who is aware of the concepts of rationality or superstition would consider them respectively positive and negative.

Finally, it should be noted that although it considers cases of themes that may be generally seen as undisputedly positive or negative, the negativeness (/positiveness) index of the images of the social world does not consider the intensity of each image of the social world. This important methodological limitation that must be taken into account when interpreting the results.

3.11 – Images of traditional society and modern society

In what regards the pair traditional society / modern society, the ideal goal of this study would be to assess the contribution of each of the works of the corpus to form a picture of the Iberian countries in such terms. That would entail answering the questions (1) “Does work X convey to its audience a picture of traditional or modern society or both and what are the global pictures built by all authors about Portugal and Spain in this regard?”; and (2) “What is the intensity (relative to the other works of the corpus) with which each author does this?”

Such external analysis would entail, though, very strong assumption regarding the structure of the reception of the reader. It would imply assuming that s/he is able to deal with the pair traditional society / modern society, being knowledgeable enough to understand those concepts and to categorize (all or some of) the images of the social world according to them. The analysis must then be internal (focusing on the deep structure of works rather than on how they reach its audience) and the relevant questions become (1) Does *author* Y convey a picture of traditional or modern society or both and what are the global pictures built by all authors about Portugal and Spain in this regard? (2) What is the intensity (relative to the other works of the corpus) with which each *author* does this? Question (1) is answered by the calculation of the indicators

intensity of traditional society and intensity of modern society and question (2) by comparing those indicators. Density is considered to account for differences in work extension.

Given the controversy surrounding postmodernity (as per literature review), the concept is not considered as a category for analysis alongside traditional society and modern society. Another reason for exclusion is the difficulty to apply it to the corpus, a problem which mostly stems from the high degree of generality of indicators of postmodernity. As seen in the literature review, they include postmaterialist values reaching beyond material security; reflexivity; self-consciousness of historical relativity; questioning of the place of Western culture in relation to non Western cultures; distrust or rejection of grand narratives and totalizing explanation systems; emphasis in micro, local or regional practices; and focus on multiplicity and heterogeneity. Notwithstanding, some of these criteria (namely the questioning of Western culture; distrust or rejection of grand narratives; and emphasis in micro, local or regional practices), are used in the interpretation of results.

Based on the discussion of the literature review, the presence of one or more of the following elements in an image of the social indicates either traditional society, modern society or both:

| traditional society | modern society |
|--|---|
| - close-knit social relationships with strong emotional bonding based on face-to-face interaction, that is, community in the territorial sense (as opposed to a relational, geographically dispersed group of people) ²⁵⁶ | - anonymity of relations in a large society, with a mediated social life (through markets, communication technologies, bureaucracies) |
| - absence of work division | - specialization / industrialization / mechanization |
| - absence of the criteria of reason and the importance of tradition, traditional authority and magical thinking | - preponderance of the criteria of reason as organizer of social life and a way of dominating Nature |
| - orientation towards the collective | - orientation towards the individual |

²⁵⁶ The dichotomy rural-urban is not deemed appropriate for interpreting the texts, given the contemporary phenomenon of mass media spread urban culture into the countryside. Also, the physical space occupied by the countryside is much higher than its importance in a society – e.g. in terms of population, economic activity or cultural dynamics, which makes it likely that a travel writer moving randomly through a country tends to experience (and possibly describes more the countryside).

3.12 – Essential differences or similarities of otherness and relations with humanism and cultural relativism

The study also considers the affirmation by authors of the existence of fundamental differences or fundamental similarities between otherness, on one side, and sameness or Humanity (or the rest of it), on the other. Specifically, taking into account the discussion of the pair humanism/cultural relativism presented in the literature review, the affirmation of existence of reason within otherness is considered an indicator of a humanistic view. The affirmation of absence of reason can also be an indicator of humanism, if implicitly holds that the rest of Humanity shares reason against an island, at most an archipelago, of irrationality, as the view on “primitive” societies studied by earlier anthropology before the advent of cultural relativism. Cultural relativism – as the opposition to a universalising consideration of all cultures (through reason and supposed “human” values, as per literature review) – is not considered prone to be inferred from the texts in the corpus unless rather explicitly stated by an author.

3.13 – The statistical significance of comparisons between authors

Hoover (2008) highlights the importance of using statistical tests of significance (such as Student's T-test or Chi-square) when comparing frequencies or averages among a group of texts to account for the likelihood that observed differences could have arisen by chance. He is writing, though, in the context of computer-aided text analysis, in which units of analysis are mostly words and their subdivisions such (syllables, etc) and not ideas, which are not (fully) prone to computerized identification and counting. As the present study, having as basic empirical unit the image of the social world, falls in the second case, it is assumed that the role of chance in the empirical unit is negligible. Some of the ideas in the corpus deemed relevant for this study (that is, the images of the social world) may have derived from chance in the sense that in many cases (depending on their epistemological source(s)) they ultimately depend on the contacts of authors with otherness (which in some cases authors leave to randomness). However, the *selection* of the observations to be written about can not be assumed to be (significantly) random, being the sole responsibility of author. For these reasons, no such statistical tests are performed in the comparisons in next chapter and beyond.

Chapter 4 – Analysis of individual works

4.1 – Introduction

In the sections to follow an analysis is performed of each work of the corpus vis-à-vis the other works of the corpus (so that, unless otherwise stated and/or not appropriate, all indicators are stated in terms of density, that is, per 10,000 words). The focus is on cases in which the indicators described in previous chapter assume extreme values, although where appropriate closer to the average values are also be noted (the full results can be seen in Annex B tables). Therefore, not all works deserve the same length of text, as some present more extreme values and/or characteristics and patterns which need more description and discussion. Less extension, of course, does not mean a more superficial analysis, as accumulation and cross-reference allow for economy of words. In order to better appreciate significance of the data and possibly suggest explanations for it, the circumstances in which each of the authors contact with otherness are first introduced (next section).

4.2 – The circumstances of the contact with otherness

The circumstances of the contact with otherness are considered **exogenous variables** in that they influence the content and structure of the works of the corpus (e.g. number of images, distribution of images by forms of knowledge and sources of knowledge, etc), while content and structure are considered **endogenous** because they are not deemed as influencing the exogenous variables. The circumstances of the contact with otherness include the following categories:²⁵⁷

- a) nomadism versus sedentarism;
- b) tourism, travelling and migration;
- c) gender;
- d) degree of epistemological premeditation in the contact with otherness;
- e) degree of professionalization of the writer (already detailed in the section 1.7)

²⁵⁷ These categories and those to follow were produced in a process akin to that originating grounded theory (Glaser and Strauss, 1967), which is detailed in section 3.10. As in 3.10, the process is different from grounded theory in that its immediate goal is not generating theory but stick to the first step of grounded theory – classification.

- f) travel “abroad” versus travel “at home” (only Camilo Jose Cela travels in his own country/culture/society)
- g) degree of command of the local language (amongst the corpus, only Camilo Jose Cela is native of the language of otherness)

Nomad and sedentary writers; travellers, tourists and migrants

Of the above categories which are not self-explanatory, the condition of the author as tourist, traveller or migrant draws partially on Leitch (2009), but given its insufficiency in distinguishing the tourist from the traveller in operational terms (as discussed in the literature review), other criteria are used, as developed below. **Epistemological premeditation in the contact with otherness** considers whether the search of knowledge about otherness influences the way an author moves within and relates to the social world in which s/he is travelling or living or if this is randomly determined (e.g. does an author establish contact with a given social group by chance or by premeditation derived from an intention to know (about) it?).

The authors of *Uma Casa me Portugal* (Richard Hewitt), *Driving Over Lemons* (Chris Stewart) and *Spain: Paradox of values* (Franck Arencibia) contrast with their colleagues by being sedentary. Hewitt buys and an old house in a village near the capital city of Lisbon and his narrative evolves mostly within the village, occasionally describing short leisure trips to Lisbon. Similarly, Chris Stewart settles in his newly acquired farm in Andalucía for good, while Franck Arencibia based his narrative in his experience of several years living in Spain. Miranda France (*Don Quixote's Delusions*) and Polly Evans (*It's not about the tapas*) describe their travels through Spain in the time of the narrative and also their previous experiences of living in the country for a few months; given they did so in the quality of students (not the typical migrant, then) and that such periods are not dominant in their narratives, they are considered nomads.

The sedentary character of Hewitt, Stewart and Arencibia is strongly associated with their condition as migrants – in contrast with nomadic authors, who are by logical necessity non migrants, given they do not have the opportunity to obtain material resources for their survival as they are constantly on the move²⁵⁸. We thus see Richard Hewitt engaged in refurbishing the

²⁵⁸ It could be counterargued that these nomadic authors (and even the sedentary authors) earn a living within otherness by gathering experiences that they subsequently transform into books. This, however, falls outside the spirit of Leitch's (2009:4) definition of the migrant, when he affirms that “Twain migrates in *Life on the Mississippi*

house he acquired, an activity he performed professionally in the USA prior to moving into Portugal and also wishes to perform professionally in Portugal²⁵⁹, while Chris Stewart goes to Spain to raise sheep for a living and Franck Arencibia focus on a period of his life working as an English teacher in Madrid.

These authors are then clearly **migrants**. The predominance of subsistence as a goal implies that their configuration of the contact with otherness is random, that is, not related with an *a priori* intention of acquiring knowledge, given their observations of otherness and relations with the members of otherness are a side effect of their main activities there.²⁶⁰ This contrasts with the tourist, as (also discussed in the literature review chapter) some views of tourism see the distance from an everyday life role where work is predominant as essential to define the touristic role²⁶¹.

It is now necessary to differentiate, amongst the nomads, between tourist authors and traveller authors.²⁶² As seen in detail on the literature review, Leitch (2009:3) considers Mark Twain a tourist in works where he travels in a large group, hires tour guides and sees “the sights”, that is, “sites important to him, rather than sites important to the culture he tours”, but such definition is somehow vague and subjective. It is then necessary to use other criteria, as follows. First, sights are considered places where – as in guidebooks, according to Curtis and Pajaczkowska (1994:207) – “all aspects’ of the social infrastructure of everyday life” are absent,

and *Roughing It*. Rather than see the sights, he gets a job.” The traveller writer is more distanced from otherness because he is not trying to obtain material resources by supplying otherness directly (although, as in Arencibia as an English teacher, the skills depleted might derive directly from the condition of foreign of the author, placing him in a special position in the local market).

²⁵⁹ In this sense, for the purposes of this study Hewitt can be seen sociologically (if not economically) involved in the Portuguese market as, even if he is coordinating works in his own property, the process is the same as if he were carrying out the activity as a business, implying relations with local suppliers of work and other inputs. As such, he can be considered a migrant.

²⁶⁰ This allows, however, for a work to claim conveying knowledge as objective, as is the case with Franck Arencibia's *Spain: Paradox of Values / Contrasts of Confusion – A Foreigner's Personal Perspective*: “You are about to read what it is like to live in Spain.” (page 1); “I have described the real Spain - the one that tourist never experience.” (page 281).

²⁶¹ Urry (2002(1990):1) and Curtis and Pajaczkowska (1994:209). Although these views are deemed in the literature review insufficient to distinguish tourism from all other activities (so that a further discussion on this follows), they are sufficient to distinguish the migrant from the tourist.

²⁶² It should be noted that instead of “traveller”, which in general use in fact encompasses the tourist, a figure also involved in travel, one could use other words to perform a distinction vis-à-vis the tourist, such as “visitor”, “stranger” and alike. “Traveller” is used to follow Leitch (2009) terminology, but one should be conscious of the risks of romantization some connotations of the word entail.

including no reference to the world of work.²⁶³ They can then be the object of any of or both types of Urry's tourist gaze (2002(1990)), the collective and the romantic. Second, irrespectively of whether sights are seen by the authors of the corpus as “the places to be” because a large quantity of other people go there” (collective gaze) or objects of intended solitary contemplation (romantic gaze), it is assumed they can only be considered attractions because they are somehow previously marked as such, as “the tourist is interested in everything as sign of itself” (Culler, 1981:127).

As for the figure of the traveller, Leitch applies it to Mark Twain when, being abroad, he “engages in activities beyond simply seeing the sights”, “is led as frequently by hosts in their respective countries as he is by professional guides”, hires professional guides whose “duties are closer to that of a porter than of a tour guide”, spends longer in each stop, “interacting while travelling with both residents and travellers unlike himself” (:3). Given that interaction between visitors and locals can be of a market nature and this is an important trait of tourism (details in literature review), one must add to Leitch's criteria of the traveller the frequency of affective relationships established with otherness.

In summary, within the corpus the tourist is to be identified in opposition to the traveller by:

- 1) visits to sights (as opposed to references to everyday life)
- 2) establishment and enactment of social relations with otherness which are primarily non affective, being mostly instrumental (as opposed to relations of romantic affection, friendship or acquaintance relations for motives other than income/profit).^{264 265}

In what regards criterion 1, the definition of sights or tourist attraction proposed by Urry (2002(1990)) is not considered in full given some insufficiencies and difficulties with its inner

²⁶³ Therefore, such definition of sight (and implicitly of tourist) differs from that of MacCannell (1999 (1976)), for whom the world of work and more generally of everyday life is also an object of tourist's search for authenticity (see literature review).

²⁶⁴ Implicitly, this criterion also considers whether the visitor travels in a group with fellow visitors, because when this is the case opportunities for close connection with locals are rarer.

²⁶⁵ These criteria are not adequate to identify the migrant. Paradoxically, due to a long permanence within otherness, such figure might visit a high number of “sights” in absolute terms without these becoming very significant relative to her/his other activities or engage in such visits in a significant way. Similar reasoning applies to the establishment and enactment with otherness of social relations of a market nature (in very much the same way as local dwellers would do). In these two cases, though, the defining trait of the migrant (trying to earn a living within otherness) can be still at work and thus identify the migrant.

working and operationalization. First, the mediation involved in the creation of sights (see section 1.4, page 16) would not be (easily) observable in texts mentioning them (and possibly not always easily observable in sights themselves). Second, the notion of romantic tourist gaze, defined as emphasizing “solitude, privacy, and a personal, quasi-spiritual relation with the observed object.” (:150) does not seem sufficiently defining as the attitude can be seen in realms other than tourism.²⁶⁶ Third, the idea of “place to be” underlying his notion of collective tourist gaze includes the ambiguity of “wide numbers” of other visitors and suffers from the necessity of an intrinsic, real capacity to attract people at least initially (detailed discussion on literature review).

The definition of sights is thus better established by induction (and then theoretically refined where needed), for which Julio Llamazares *Trás-os-Montes*'s is helpful. The author makes reference to a) 19 historical / heritage public / private sites such as churches, castles and other non contemporary, non military buildings and urban furniture (such as statues) which, with the exception of some churches, are currently not used for the purpose they were originally intended but are available for visiting, the representation of the past being their only current role; b) a museum; c) two natural sites and d) four places which are worth mentioning because they are associated with the biography of an important writer or an historical figure. Although none of these places seems capable of attracting a large number of people (both because their remote location and their seemingly low intrinsic capacity of attraction, not being extremely out of the ordinary) and many do not seem specially fit for the romantic tourist gaze, they can be considered tourist **attractions at local level**.

This notion assumes that people somehow compare the quality of the gaze they expect from a given place in terms of the actual experience or of e.g. of the status provided by having had the experience (mediators are essential in the formation of such expectations, as pointed by Urry) with the efforts involved in visiting it (in terms of money, time, discomfort involved in the journey to get there, etc). The potential visitor will only actually go if s/he feels such “**tourist ratio**” is above a certain value, which could be theorized to be the same for local, national and international potential tourist attractions, considering the point of view of the same individual in roughly the same moment of her/his life (the critical minimum of course would vary from

²⁶⁶ E.g. in pilgrimage, as per Turner (1973), who is actually considered an (indirect) tradition in the study of tourism (details in literature review).

individual to individual and from time to time according to many factors).²⁶⁷ For example, Lisbon's castle, mentioned by Paul Hyland, is easily reached by visitors from abroad who are already in Lisbon, being also impressive (as pictures may suggest in advance) and having a more important place in History (as guidebooks may inform) than the castle of Bragança, the capital city of Trás-os-Montes region, mentioned by Julio Llamazares. However, for the inhabitants of Trás-os-Montes (assuming *ceteris paribus* for the sake of argument) the local castle involves a lower effort, so its «tourist ratio» is higher than for the international tourists in Lisboa and may justify a visit.²⁶⁸

Table 4.2, below, thus presents the number of **tourist attractions** in the nomadic works of the corpus according to criterion 1, and which are defined as those who are visited for leisure purposes and fit any of the criteria similar to a), b), c), d) above and also e) cities and villages referred / known as tourist attractions as a whole and elements the like. International, national and local level attractions are therefore included which are either described as interesting in themselves or as representations of the past (in opposition to signs/elements of the contemporary society with which the author contacts). Such criterion fits, therefore, Leitch's (2009) notion that the tourist visits “sites important to him, rather than sites important to the culture he tours”.²⁶⁹

Table 4.2 – Tourist attractions in the nomadic works

| Work | number of attractions | number of attractions per 10,000 words | % of the average of the nomads |
|---------------------------------------|------------------------------|---|---------------------------------------|
| <i>Nuevo viaje a la Alcarria</i> | 56 | 8.3 | 274 |
| <i>Backwards Out of the Big World</i> | 52 | 5.3 | 175 |
| <i>It's not about the tapas</i> | 43 | 5 | 164 |
| <i>Trás-os-Montes</i> | 26 | 3.8 | 127 |

²⁶⁷ This logic is similar to the media use of the indicator “deaths per km” when assessing the importance of human tragedies to be broadcast (km being the distance between audience and the place where events take place).

²⁶⁸ It is possible that the local character of a tourist attraction, given the absence of large numbers of visitors, makes it more prone to the establishment and enactment of (at least temporary) social relations with otherness. This is one of the reasons why criteria 2 above must also be considered, although, as can be seen in the next chapter, Julio Llamazares, the great visitor of local attractions, does not establish such types of relations nor he extracts much knowledge from his contacts with otherness.

²⁶⁹ Of course, some tourist attractions are important for a culture in the sense they are considered symbols of such culture by locals (even being celebrated in certain moments), but these cases do not seem to be the rule. Also, the importance of some tourist sights for the economy surrounding them or for a whole country is not being considered here.

| | | | |
|--------------------------------|----|-----|----|
| <i>The last old place</i> | 10 | 1.3 | 44 |
| <i>Don Quixote's Delusions</i> | 9 | 1.2 | 38 |

Criterion 1) thus identifies two groups in the corpus: four works clearly above the average in terms of density and absolute number of attraction higher than 20; and two works with 10 and 9 attractions and very much below the average. In what regards criterion 2), no nomadic author moves within otherness in a permanent web of market relations entailing the transaction of goods and services specifically designed to cater for visitors, as the (pure) tourist would. Despite this, Julio Llamazares and Polly Evans stand out from their colleagues of the corpus in their low level of non-commercial social relations²⁷⁰. This, together with the significant number of attractions included in their works and the fact that they are also low in use of informants (Table 4.3, below), up to some point an indicator of non market relationships, makes Llamazares and Evans the (most clear) tourists of the corpus.²⁷¹

All other authors establish deeper and more frequent relations in which market transactions are not of essence. Datus Proper (*The last old place*) travels with Adriano, a Portuguese former lawyer and “friend”; when Proper writes that “he had offered to guide me around his country [and that] (...) our trip was to be my narrative spine” he is considering explicitly a relation with otherness based on the search for knowledge.²⁷² Miranda France's *Don Quixote's Delusions* presents similar characteristics, explicitly referring to informants (some sophisticated, such as several people with the title of “Professor”, as mentioned in the acknowledgements) for which she searches intendedly as a journalist would do (although not dismissing occasions provided by

²⁷⁰ Llamazares travels for 5 days, explicitly uses his guidebook with some frequency (pages 13,16, 18, 19, 53-54, 71-73 and 100); engages in very brief dialogues with people (according to his own reckoning, he has difficulties with Portuguese); and only gets acquainted with – or, more precisely, is recognized by – a barber who shaves him at the beginning and at the end of his journey). Similarly, Evans does not engage in social relations of an affective nature, the closer she is to that being the time when she accepts an invitation to go to a flamenco bar with an *American* writer she meets by chance.

²⁷¹ These two authors are also tourists in that they have fulfil the “primarily visual relation to reality” criterion used by Curtis and Pajaczkowska (1994:207) to define the tourist. This is specially the case for Llamazares: although for each of the authors of the corpus description and observation are overwhelmingly dominant respectively as forms of knowledge and sources of knowledge (see tables 6.11 and 6.18 in Annex B), in Llamazares the share of observation in total cases of forms in his book is 80.8, the highest in the corpus. For Evans, 3rd in rank amongst the 6 nomads in this regard, the degree of visual relation when compared with her colleagues is not so strong.

²⁷² This work also shows how a low use of the source *informants* does not necessarily entail non market relations. On Table B.11 and subsequent tables, which detail such use, *The last old place* is usually at little more than half the average, not reflecting the permanent and profound connection between the visitor and Adriano, with whom he also engages in leisure activities such as fishing and hunting, in whose houses he stays and who has visited (the reader is informed) the author in his home in the United States.

chance²⁷³). She makes the highest use of informants within the nomads, doubling their average (Table 4.3, below), and she also refers friendships and acquaintances during the period she spends in Spain as a student. This, along with the lowest density of tourist attractions, in which she is accompanied by Proper, also a non-tourist according to criterion 1, makes France and Proper the (most clear) travellers of the corpus.

Table 4.3 – Use of informants as sources of knowledge (nomadic authors)

| Work | absolute number | per 10,000 words | % of the average |
|---------------------------------------|------------------------|-------------------------|-------------------------|
| <i>Trás-os-Montes</i> | 7 | 1.0 | 47 |
| <i>Backwards Out of the Big World</i> | 25 | 2.5 | 116 |
| <i>The last old place</i> | 8 | 1.1 | 51 |
| <i>It's not about the tapas</i> | 0 | 0.0 | 0 |
| <i>Don Quixote's Delusions</i> | 40 | 5.2 | 242 |
| <i>Nuevo viaje a la Alcarria</i> | 21 | 3.1 | 144 |
| average | | 2.1 | 100 |

Paul Hyland's *Backwards Out of the Big World* is 75% above the nomad average in terms of density of tourist attractions, which places him on the tourist side. Still, he is significantly (16%) above the average in the use of informants, who include people he mentions as friends and other non friends which he actively looks for. More than in France, the journalistic method of searching for sophisticated informants is explicit, and his work includes an interview with the claimant to the (would-be) throne of Portugal and the best-selling writer Lúcia Jorge. In the beginning of the book Hyland also thanks the several dozens of persons who have helped in his “research”, some of which are presented as attached to institutions in the realm of culture (libraries, foundations and cultural centres), others as writers; to this, a reference to talks with “Portuguese intellectuals” and a pre-arranged meeting with a painter must be added. Such procedures reinforce the credibility of the author's intentions in terms of knowledge reflected in the claim that he wants to “take the country as it comes, as it offers itself to me” and “find out how Portugal discoverer of most of the world, founder of the first modern empire and, once, the

²⁷³ This happens when she finds a psychoanalyst in a bar and talks to him about manhood in Spain (page 214) and follows a woman she herds saying is going to see “the Virgin” (page 88).

richest country on earth - gets on with being not great any more.” Hyland therefore is considered a traveller as well.

Camilo José Cela (*Nuevo viaje a la Alcarria*) is markedly both a tourist (he is the great sightseer, at 2.7 times the average) and heavy user of informants (44% above the average). Interestingly, though, in many of dialogues he initiates there is no gathering of knowledge (so they do not entail the use of an informant), no visible intention of obtaining it and no visible intention other than enacting the Spanish language, as detailed in sections 4.4 (dealing with Llamazares, who uses a similar mechanism) and 4.10 (on Cela). Moreover, the purpose of these dialogues is never to establish affective relationships, either as a aim in themselves or as a stepping stone for establish informants, as none of these possibilities become an actuality in his text.²⁷⁴ ((and his celebrity status does not allow for affective relations))

Cela intendedly assumes and exacerbates his condition of celebrity being the conspicuous visitor who is transported in a Rolls-Royce driven by a woman from “San Luis, Missouri, a Stanford University graduated” which he calls Otelina “because her skin is of the same noble brightness as Shakespeare's character [Othello]”. The status of famous writer takes him to participate in literary prize award ceremonies and he quotes commemorative plaques registering his first passage in the region 40 years before (which gave origin to his classic *Viaje a la Alcarria*) and which make a significant portion (20%) of the 56 attractions he mentions²⁷⁵. With Urry (2002(1990), discussed above), one can consider that for Cela, the traveller-tourist-of-himself, “the places to be” are the tourist attractions which he himself has created.

Epistemological premeditation in the contact with otherness

The role of the search for knowledge as a motivation of the writers of the corpus has been briefly dealt with above when talking about the sedentary writers, the use of informants and to justify Hyland's inclusion amongst the travellers. Nonetheless, it is also relevant to consider it more generally as a factor contributing to define the way each writer (claims) s/he approaches

²⁷⁴ On one of such dialogues, after describing a small girl playing tennis alone (no relation with any previous part of the book), Cela asks her, “Are you bored?” She answers, “Yes, Sir” and the text proceeds in the following line with “The garden of Sir Teodoro is full of flowers...”, the girl never being mentioned again, directly or indirectly.

²⁷⁵ Here is one the 11 cases, which present an almost identical form: “C.J.C. slept in this house July 6th 1946.” A quote from *Viaje a la Alcarria* follows.

otherness and which parts or dimensions of otherness are approached, considering also the classifications within the axis tourist-traveller.

In this context, tourists Llamazares and Evans are also similar in that their encounters with locals look random in their origins and there is no indication that their routes were defined by a specific intention of acquiring knowledge. Llamazares writes that when he does not know what to do regarding his trip he “lets the way tell him”, while for Evans (as with sedentary Richard Hewitt) catharsis and empathy are the initial purpose²⁷⁶, together with the challenge of pedalling for hundreds of miles, the gathering of knowledge being absent in the summary she makes in the last two paragraphs of the book, where she mentions the physical effort, the dangers faced and the fact that she lost weight despite having eaten considerably.

Differently from Llamazares and Evans, and despite his many random encounters with people on the way, Paul Hyland establishes a route *a priori*:

However I travel - afloat, on road and rail, or on foot - the river is my reason. My journey is the Tagus, up it and many a metaphorical tributary. I am travelling inwards from the edge, *backwards out of the big world*. (:6)

Datus Proper, in turn, does not define a geographical guideline for his trip, but, as with Hyland, knowing Portugal is an explicit purpose, for which his friend informant is crucial.

every day, we hunted for Portugal and gathered pieces of it. When we compared our findings, we saw that we had discovered... different countries. Adriano had more imagination than mine. I would gather facts; he would add the myths that made sense of them. (:47)

As Evans, France alternates her first stay in Spain (Madrid, 1997 and 1998, as a graduate student) with a visit made approximately ten years later. Her book does not make explicit the reason for the choice of place, but referring to her first arrival in the country, she writes:

I wanted to sample the spirit of revolution, if it was still to be found in Spain. Although I had only ever visited the Spanish capital briefly, my studies suggested that idealists were in ample supply there.

²⁷⁶ In the beginning of the book she tells the reader that in she “had to get out of Hong Kong” and that she “held out high hopes for the occasional friendly smile, an encouraging toot of the horn, cosy chats with new-found friends in rustic bars overseen by ruddy-faced, perpetually smiling barmen (page 14)

(:25).

In the second period, on the contrary, the contact with otherness is clearly premeditated by the intention to know²⁷⁷, as it is also clear from her use of informants, as seen above. She also portrays herself in a similar fashion to Hyland and Proper in that she makes use of sophisticated insiders who, contrary to the typical informant of the anthropologist (who usually makes claims about his/her own experience and at most about a small community with s/he has face-to-face relations) talk about the whole Spanish society or whole peoples or regions of Spain.

In summary, the role of the search for knowledge in influencing the contact with otherness varies almost perfectly according to the condition of writers as migrants, tourists or travellers. In the case of the migrants and tourists, such role is not visible; in the case of travellers, such role is visible, with traveller-tourist-of-himself Camilo Jose Cela as the exception to this general pattern²⁷⁸. The table below summarizes these findings:

Table 4.4 – The conditions of travel

| status | authors | epistemological premeditation |
|------------------------------|----------------------------|--------------------------------------|
| sedentary / migrants | Hewitt, Stewart, Arencibia | not visible |
| tourists | Llamazares, Evans | not visible |
| travellers | Hyland, Proper, France | visible |
| traveller-tourist-of-himself | Cela | not visible |

4.3 – House refurbishing, cultural refurbishing: the exotification of (*A Cottage in*) *Portugal*

Tourist Richard Hewitt's work is characterised by a relative low epistemological density. Density of extension of knowledge of the social²⁷⁹ is the third lowest in the corpus (69% of the

²⁷⁷ After mentioning the ubiquity of nouns in the country, she reveals the intention of get in touch with one (page 19), a contact which is made possible by a private detective (page 67). On page 23 she decides to make a journey around central Spain to “see how different things are since I lived here ten years ago”. There, she is partially guided by the geography of Cervantes's *Quixote*, but she also moves in search of knowledge of the present, looking for and finding Castilian separatists after seeing a separatist slogan on a wall (page 168), entering a gypsy camp because “I wanted to know more [about the community]” (page 212) and visiting a local association of large families (page 227).

²⁷⁸ As argued on section 4.10, Cela can be considered a traveller-post-tourist-also-of-himself.

²⁷⁹ This indicator considers the density of images of the social world weighted by their degree of generality. For details on calculation see the end of section 3.5 on page 119.

average) and density of images of the social world is the second lowest (70%).²⁸⁰ Reduced density is generally observed for all forms of knowledge, which bar understanding²⁸¹ present low densities vis-à-vis the remainder of the corpus²⁸². The composite indexes of forms²⁸³ also shows low relative values for all forms except understanding (description being second from bottom, with the remainder three forms located in mid-rank, but quite below the average). In terms of composite sources, *Uma Casa em Portugal* is also quite below the average for all sources, especially in the case of informants (49%) and indirect information (19%).²⁸⁴

Low epistemological density is up to some point unexpected given the author's condition as migrant (as per typology established on previous section). The long sojourn within otherness which is associated with such condition allows for more observation relative to the figures of the traveller and the tourist and, consequently for more images; therefore, one would anticipate that the sincerity implied by the pact of factual reading of FLO would lead an the author to produce a book dense(r) with images of the social world. Similarly, the migrant is more likely to establish deeper and more frequent social relations with locals, which is at odds the low use of informants (half the average) seen in Hewitt.

These inconsistencies could of course be accommodated within the pact of factual reading on the grounds of the focus of the writer in earning a living and his agency powers (he may have chosen to produce a book not focused on his direct experience), although agency would not amount exactly to an explanation, as in its ultimate form it is the black box or the residual of social science (or one of its black boxes or residuals). There are grounds, though, to question the

²⁸⁰ The whole of quantitative results for this and other authors can be seen in Annex B.

²⁸¹ Second in corpus, 134% above the average.

²⁸² 67% to 80% of the average. This general matching between low values in images and low values in forms (and low values in sources, as seen below) is not a result *per se*, as it is mostly due to the way these indicators are built. The use of forms is identified based on images, the same applying to sources (methodology chapter); therefore, on the whole of the corpus correlations are very high between a) quantity of images and quantity of forms and b) quantity of images and quantity of sources (see corresponding section on Annex B). The distinction between images, forms and sources is, however, important (mostly when compared with other indicators, as it will be seen below).

²⁸³ This is based on a) the density of the form relative to the average of the corpus and b) form relevance within each work (that is, percentage of a form in the total of forms of a work) relative to the average of the corpus, as per methodology chapter, section 3.5).

²⁸⁴ Other less relevant results are that forms of knowledge are distributed overwhelmingly in favour of description – a result obtaining for all authors – followed by mediation, assessment and explanation (in the range of 8.3-14.3 %) and lastly, at a significant distance, by understanding. As regards sources of knowledge, observation is the most used (underlying 58% of the images) – a result also common to the entire corpus, followed by reflection (20.2%), informants (10.1%) and indirect information (7.1% of images). Ambiguous and non-ambiguous sets account for the remaining 5.1% of sources. (These are cases of images which have more than one source (non ambiguous sets) or which source is one of a set of sources (ambiguous sets), as per methodology chapter.)

sincerity of Hewitt's account based on the structure of *Casa* in terms of the degree of generality of the images of the social world.

The average degree of generality is 2.05, corresponding almost perfectly to the level of generality of a group/village/city (see methodology chapter) and matching the space where the author spends most of his time/text²⁸⁵. But the majority (38%) of his images are level 3²⁸⁶, that is, refer to the whole of Portugal, the Portuguese people or categories of Portuguese people (e.g. “the Portuguese worker”). Therefore, despite being generally confined to a social space with a level 2 degree of generality, the American author ends up by transcending such space with more general images.

What is more, in *Casa* there are 16 level 3 images (or 50% of a total of 32 level 3 images) that, given their subjective nature, seem to have involved observation as source and not informants, indirect information or reflexion²⁸⁷. Other authors in the corpus also present cases of the kind, but their experiences are more varied, so that one might imagine, for each image, an inductive process of generalization based on several observations of different social subspaces. Significantly, Chris Stewart, an author whose social space is approximately as confined as that of Hewitt, presents no case of the kind (presenting a single level 3 image). Therefore, the abovementioned pattern observed in Hewitt amounts to a violation if not of the letter, at least of the spirit of the pact of factual reading of TW/FLO, as the account is expected to be mostly based on what the visitor has experienced directly and not on (possibly abusive) generalizations.

There is also a mismatch between Hewitt's epistemological empathy and his condition as migrant as defined by Leitch's (2009) (previous section and section 2.6). As per methodology chapter (last subsection of section 3.7), epistemological empathy is expected up to a point to reflect empirically the difference between the tourist writer and the migrant writer – which is presented by Leitch's (:4) in his claim that under the condition of migrant, writer Mark Twain

²⁸⁵ In Hewitt there is a major contrast between life in the village where he lives and the life of the city (of Lisbon, where he goes sometimes in leisure trips). The fact that this contrast is not captured by the levels of generality shows that they are too broadly defined. The type of social space of the village fits “the notion of a particular bounded space with close-knit social relationships based upon strong kinship ties and length of residence” which Featherstone (1995:178) sees associated with the term local within sociology, and is substantially different from the notion of city. As argued in the methodology chapter, however, there are advantages in a 3 level framework as opposed to a higher number of levels. The distinction between village and city is captured in this study by the distinction traditional society / modern society and by the themes..

²⁸⁶ 29% are level 2 and 33% are level 1.

²⁸⁷ Examples are the assertion that the Portuguese society is “fatalist”, believing a series of random events determines the lives of people (:97), and the reference to the “impenetrable logic” of the Portuguese (:199).

“judges phenomenon according to the terms of evaluation set down by the culture he is joining” (due, still according to Leitch, of the specific conditions of immersion in otherness of the migrant – living and working locally – entail). *Uma casa*, though, is located very near the average of the corpus in terms of epistemological empathy, significantly below travellers Miranda France and Camilo Jose Cela (figures 1 and 2 on section B.5. Annex B). This, together with the fact that none of the other migrants – Stewart (at the bottom of the rank) and Arencibia (also mid rank) – verify the theoretical expectation, leads to the conclusion that the corpus at hand does not fit the predications made based on Leitch's typology that migrants, travellers and tourists should form different groups when ranked according to their degree of epistemological empathy.

Possible explanations are that the authors of the corpus behave in a way fundamentally different from Mark Twain in this regard; that epistemological empathy is not an adequate proxy for Leitch's axis; that Leitch non quantitative analysis did not correctly captured Mark Twain's status as tourist, traveller and migrant; or a combination of these reasons. In the case of Hewitt, there is also the possibility that he is not actually a migrant according to Leitch's definition, despite depicting himself as such, in what would be a further violation of the pact of factual reading of FLO (as seen above).

The likelihood of such behaviour being a general pattern in Hewitt is reinforced by the fact that some of his descriptions, although not impossible, seem rather unlikely from the position of a native of Portugal (as is the case of the author of this study). It is thus that a local inhabitant says that *cantarias* (a decorative stone used around windows) are “intended to avoid that evil spirits enter a house”, a piece of supposed folklore which does not seem to be widely (or at all) believed in Portugal (:110). On page 116 the author sees two workers of a local coffee house entering a public administration building carrying cakes, coffee and *bagaço* (a local spirit drink); although these products are commonly consumed, coffee drinks are not usually delivered, but consumed in cafeterias as soon as produced. On page 150, when it becomes known that he had challenged the water supply company over its delay in installing infra-structure in the village, “many villagers” start presenting him other problems such as hydraulic pumps not working, medical receipts they could not read and daughters with unwanted pregnancies.²⁸⁸

²⁸⁸ The latter problem, of course, is necessarily a gross exaggeration, as the birth rate would have to be very high in such a small village to produce several cases of unwanted pregnancies in the few months the author lives there. The same can be said of a police station chief who “in the name of the law” offers his gun to the author when he complains about having been robbed (:208). Also, when the foreign couple is about to leave the village for good, it

Hewitt, then, would not seem to be even in position to counterargue “I aim at truth, not facts”, as did writer Jerzy Kosinski holding that he wanted to portray an historical situation, when it became known that many of the episodes mentioned in one of his novels, which he argued was closely based on his own childhood, never took place.²⁸⁹ In the case of *Uma casa* the issue regards more Hewitt’s claim to “truth” (a native Portuguese would note that the behaviours he describes are not frequent/representative) than the “facts” (it has not been proved that the behaviours have been invented, nor they are impossible, only very unlikely). Moreover, one cannot see Hewitt playing with ambiguity between fiction and non-fiction, as for example is the case with Bruce Chatwin and Camilo José Cela (see section dedicated to the latter, below). As no warning is found in his work to the contrary (e.g. calling his work a novel), he necessarily claims to be within the pact of factual reading.

This is important because serious consequences can come out of silently violating such pact. As Ash (2002) maintains:

if we claim to write literature of fact, [a self-justification as the one presented by Kosinski] must be resisted (...) for moral reasons, above all. Words written about the real world have consequences in the real world. If, in my book *The File* I had identified as a Stasi informer someone who was not, in fact, a Stasi informer (...) that man could have found his life ruined.²⁹⁰

Considering this pattern of fictionalization of reality (or outright fabrication), one may have reasons not to take as entirely genuine the following rather complex description and analysis of the village and its origins. Performed by a local inhabitant, it portrays it as a mostly enclosed,

has become “fashionable” for people working in Lisbon to live there (:216)), an extraordinary fast transformation. An overstatement also seems to take place when, presupposing that academic and professional titles are very important for the Portuguese, Hewitt makes falsely claims the possession of certain academic qualifications, impressing a water supply company officer and changing the behaviour of the company (pages 116 and 132).

²⁸⁹ His *The Painted Bird*, about a Jewish child being ill-treated by anti-Semitic Polish peasants during WWII, was initially “celebrated as a ‘testament’, a work of witness” (Ash, 2002, writing in *The Guardian* online edition).

²⁹⁰ The argument on the dangers of the fictionalization of literature presented as factual could in part also be applied to the historical novel, which according to the Encyclopaedia Britannica (quoted in Wikipedia) is the one which “has as its setting a period of history and that attempts to convey the spirit, manners, and social conditions of a past age with realistic detail and fidelity (which is in some cases only apparent fidelity) to historical fact. The work may deal with actual historical personages...or it may contain a mixture of fictional and historical characters.” Albeit in the historical novel there is a clear horizon of expectation (Todorov and Berrong, 1976) or narrative pact (Villanueva, 1992) warning that fiction is mixed with non-fiction, as Ash (2002, writing in *The Guardian* online edition) concludes “to pass this basic test of facticity does not make a text true, but to fail does make it untrue.” See footnote 415, on page 198 for an extension of the argument against the historical novel.

homogenous, solidarity and social space, a community with long roots in time (albeit not exactly a pure *Gemeinschaft*, as it is fighting for the modern facility of piped running water):

[it] had been born centuries ago, as a village for domestic servants of several palaces in the area of Sintra. And though many years had passed, it retained its modest and humble character. The inhabitants were descendants of those workers (...) [and] everyone in the village lived more or less at the same social level, a fact that created a sense of balance and stability. (...) Everyone had to fetch water from the fountain, and this served to maintain a sense of implicit unity. This feeling of unity was good in his opinion [that of the informant], and to preserve it, the villagers had decided that no one else would be connected to the water system until they [the water supply company] come up with a project to connect everyone at once. (:65)²⁹¹

The disrespect for the pact of factual reading suggests Hewitt is exotifying Portugal through *a priori* conceptions or exaggerations that he might deem especially palatable to the publishing market, making him a tourist in that he “is interested in everything as sign of itself” (Culler, 1981:127). Specifically he is looking (and finds) a mostly authentic, premodern mild wilderness made of close social relations, equality, machismo, lawlessness, lack of work ethic, magical thinking, illiteracy and humility when facing the outside world.

However, Hewitt is clearly a migrant in that he pursues his own non-leisure goals, trying to get the utility company to install the infrastructure necessary to supply piped water (this is in fact the major local ambition, and the author joins the villagers pursuing such ambition). Exemplifying the dependence of the migrant relative to otherness in trying to achieve long terms goals (in contrast to the short(er) term goals of the tourist and the traveller) the process of refurbish the ruined house Hewitt bought in the village is quite troubled, with the supposed superiority of the author given his previous experience on the job being sometimes contested by his workers, in one case even being proved right by facts.²⁹²

His local involvement is also shown strong in a bet he makes with the workers so, claims he, they do not take him as a weak boss (:102). Hewitt is not necessarily submitting, however, to a unique specificity of the local culture, but to a possibly universal male culture (nonetheless part of the culture of otherness), as he recognises that by doing so he had “entered the realm of

²⁹¹ My translation from the Portuguese version.

²⁹² Part of the house collapses due to the intervention of Hewitt, who moved forward even after advised by two local workers (:145-146).

challenge, competition, stupid macho bets launching ego against ego”. In this light, the case is presented, at least from the point of view of the author, as a challenge between individuals, not cultures, being formalized in a way that ends up by approaching the participants (it is agreed that the defeated will have to invite the other to lunch). The picture may be more complex, though: according to what had been previously agreed, the author wins the bet by managing to lift a cement mixer with his ends, but one of the workers performs the same task with one hand, proclaiming himself the winner (:140). This conclusion of the affair, then, reintroduces room for interpretation as to what is at stake: is this an instance of agency which subverts pre-established rules (and only focusing on showing/achieving superiority possibly against an otherness represented by the foreigner); or a cultural structure in which pre-established rules are easily disregarded? The latter interpretation fits well the pattern that, in *Uma casa*, the theme *disregard for law, rules, institutions* is the third in terms of density of extension of themes (with 7.54% of total density of extension in the work).²⁹³

In other instances, the American author takes a clear critical view of his own culture, prompted by aspects of the culture of otherness²⁹⁴. Within Leitch’s (2009) typology, this oscillation between endorsing the values of otherness and holding to former values actually makes Hewitt a traveller in terms of epistemological consequences (while in terms of causes, the circumstances of the contact with otherness still establish him clearly as a migrant, as argued above). Such oscillation has a parallel in the treatment of otherness within the axis difference versus similarity. Of the five cases in which he assumes Hewitt a position in this regard (Annex B, Table B.49), 2 can be considered cases of affirmation of unity otherness-sameness, consisting in explanations of behaviour which transcend the such divide (lack or low abuse of alcohol and medicinal drugs, both page 172); while 3 are cases are affirmations of difference (lack of rationality of the Portuguese in two cases and the “temporal backwardness” of the Portuguese

²⁹³ Assuming that the reader is reading the book as a representation of otherness (more so than as a description of actions of individuals) and might have been influenced by reading about other cases of *disregard for law, rules, institutions*, this climax was considered an image of the social world and the image was considered a case of such theme.

²⁹⁴ When asked by a local worker how he is going to perform a construction task apparently requiring two people, Hewitt replies in a “strange, very American way” that he intended to perform the task himself (page 119), using the expression “very much American-oriented” to the same effect on page 96. On page 139, he assumes lying to her landlady: “[She] probably thought we were trustworthy because we were American. She could hardly imagine the subtle effect the Portuguese civilization was exercising on us!” (page 139). Finally, when one of the workers he hired starts walking towards the *taberna* (a kind of local pub) considering that it is bad luck to work the day a neighbour has passed away, the author follows him (page 148).

workers, who lived in “another century”). Given similarity and difference are ascribed to different objects/domains, there is no contradiction in the presence of both types of ascription.

Hewitt's *Casa* is therefore a complex work that does not fulfill several theoretical expectations. The relative low epistemological density and relative low epistemological empathy are at odds with an author who is as migrant in terms of the circumstances in which he contacts with otherness. The condition of migrant, in turn, does not fit with the oscillation between endorsing the values of otherness and holding to former values, such oscillation making the author more of a traveller. Underlying these inconsistencies and possibly explaining them (at least in part, maybe together with possible theoretical or measurement/classification insufficiencies) is the disregard for the pact of factual reading: if an author does not faithfully renders his experience on the text, it is possible that the text includes, as observed, both unlikely content (an exotification pushed up to the point of apparently inventing descriptions of behaviours) but also contradictions between its contents and the way those contents could possibly to have been constructed (supposedly) based on reality. Such bias is not, however, directly relatable to some variety of prejudice and/or colonial stance, as show the siding of the author with the local population and some instances of his involvement in relationship with local inhabitants on an equal stand (sometimes even on the lower hand), albeit he also presents himself as village father figure at some point.

4.4 – Tourist writer Julio Llamazares: modernity in the countryside and disregard for knowledge in the footsteps of Camilo Jose Cela

Amongst the works dealing with Portugal, *Trás-os-Montes* is most intense in the affirmation of modern society, a surprising result given he travels through a region where the largest urban area (Bragança and Vila Real) do not surpass 25,000 inhabitants²⁹⁵ and where in the mid 2000's the participation of the cluster “agriculture, animal husbandry, hunting, forestry and fishing” in total production was more than three times that of the average for Portugal²⁹⁶. Such pattern is observed in terms of density²⁹⁷ and composite density of extension²⁹⁸, Llamazares

²⁹⁵ Source: Wikipedia.

²⁹⁶ The exact figures are 10.5% against 3.2% for the year 2004 in the region “Alto Trás-os-Montes” which roughly corresponds to the region of the Llamazares' title (Source: Instituto Nacional de Estatística).

²⁹⁷ 163% of the average of the texts on Portugal.

being for both indicators first in rank amongst the texts on Portugal.²⁹⁹ Such apparent strength of modern society is mitigated, though, by the fact that the percentage of images of traditional society is higher than for modern society³⁰⁰ so that Llamazares's overall picture of the region in his work is after all dominated by traditional society, in a context where the duality traditional/modern is given considerable importance by the author.

The density of images of the social world is high, ranking third within the corpus.³⁰¹ At 1.69, the degree of generality is the second lowest³⁰², meaning that Llamazares's images are mostly either concrete or refer to the region in which the author travels (level 2 of generality accounts for 62% of the number of images of the social world), not the whole country of Portugal (level 3 comprises only 3.45% of the number of images). This strongly contrasts with Richard Hewitt who, as seen previous section, writes frequently beyond his experience.

Llamazares also shows the usual asymmetry in densities of forms of knowledge, description dominating overwhelmingly. This characteristic common to the corpus is more clear in the Spanish author, though, who is first in rank in terms of density of description³⁰³ and shows a very low relative level in all other forms of knowledge³⁰⁴, a difference that is magnified in composite terms³⁰⁵. This emphasis on description vis-à-vis the other authors makes Llamazares the less epistemologically empathetic author of the corpus (figures 1 and 2 in section B.5 in Annex B) despite his sympathy towards otherness as seen in several text excerpts of text³⁰⁶ (although

²⁹⁸ 1.8 times the average.

²⁹⁹ Presented in section 3.4 (page 107), the notion of composite considers with equal weight a) the importance of a variable within a work (here, the percentage of images of modern society) and b) the importance of a variable within a group of works (here, percentage of images of modern society within authors writing on Portugal); and b) can be considered in absolute terms, in terms of density (considering number of pages), in terms of extension (considering the degree of generality) and in terms of density of extension (considering number of pages and degree of generality). Here only images which fit the notion of modern society are being considered, as per definition in section 3.11 of methodology chapter. A full description of composite density and composite extension results is provided in Annex B.

³⁰⁰ 65%-35% in absolute terms and 69%-31% in terms of extension, density not being relevant for these indicators because we are dealing with a single work.

³⁰¹ 18% above the average.

³⁰² 82% of the average.

³⁰³ 154% of the average.

³⁰⁴ They vary from 0% of the average to 64% of the average.

³⁰⁵ 189% of the average for description while all other forms loose relevance, now varying between 0% and 23% of the average.

³⁰⁶ It is thus that one can read about "the coming and going of the people who have just waken. They are the real people of Bragança, the real kings of Portugal" (page 16), an indicator of sympathy because no empirical grounds are presented to justify such view which is ambiguous (what does king exactly mean here?) but clearly favourable. A similar case is a reference to a barber "who, by what can be seen, is a professional like everybody else in [the city of] Bragança" (page 24). On another moment, after having mentioned certain architectural elements (barns and porches)

sympathy is not so clear when measured through the degree of negativeness³⁰⁷ in which Llamazares is in mid-rank³⁰⁸.)

As expected given the high correlation coefficient between description and observation, Llamazares is also high as regards the density of the latter source of knowledge³⁰⁹, being also the most intense author in composite terms³¹⁰. This is consistent with his proclamation that he “is attracted and looks, when passing by, to those men and women who talk on thresholds of doors, or spend the morning in coffee shop terraces or in front of shop windows” (:18).

Such emphasis on description / observation distanciates Julio Llamazares from her fellow tourist Polly Evans in *Tapas* (they have been categorized as tourists on section 4.2, above) as the quintessential tourist writer. In a way typical of such condition, the Spanish author mostly sticks to his own gaze in his travelling and writing, not taking “those men and women” as informants³¹¹. This happens despite the fact that, in his five day trip, many contacts with potential informants take place. Adopting the literary device used by Camilo Jose Cela in his *Viaje a la Alcarría* (1946) and *Nuevo viaje a la Alcarría* (1986) (section 4.10 below), Llamazares initiates (or strongly influences the course of) very short verbal interchanges with local inhabitants, some of which are presented below (my translation from the Portuguese edition):

Would you buy me an adhesive bandage?” – says a gipsy kid to the traveller (...) “And what would I want that for?” (...) “In case you get hurt”, says the kid, very seriously (:19).

“in the most pure style of Galicia”, a Spanish region north of Trás-os-Montes, the author holds that the local inhabitants “would correct him – being right in doing so: in the style of Trás-os-Montes, they would say, proud of their land” (page 52). Sympathy is also observed in the behaviour of the traveller, who tells a woman who takes care of a church and complains for not being paid for the job: “Well, you’ll go to heaven.” (page 34). On another occasion, in a derelict store owned by an old woman, the author buys “three tops, three ropes, two cruets, a salad bowl, two dishes and two jars, plus the paper in which is wrapped”, leaving with “the satisfaction of having fulfilled his duty and the feeling of having performed the good action of the day, although he does not know if to himself or to her. The most probable, he thinks, is that he has helped the old woman.” (page 22).

³⁰⁷ See last subsection of section 3.9 for a complete definition and section B.9 in Annex B for full results. Albeit the index of negativeness depends on the actual social worlds experienced by the writer – which are supposed, according to the pact of factual reading of FLO, to be rendered sincerely – even within such restrictions a sympathetic author would exert, it is assumed, its powers of selecting (positive) images, *mutatis mutandis* for a non sympathetic author.

³⁰⁸ This mid-rank level of negativeness obtains both in terms of density (63.6 of the average negativeness level of the corpus, a value much influenced by the extreme negative value of Arencibia, at 3.3 times the average) and density of extension (47.2 of an average again pushed up by Arencibia, at 4.1 times the average).

³⁰⁹ 172% of the average, the highest in the corpus; share of 81% of forms in the work, the highest percentage in the corpus.

³¹⁰ 243% of the average.

³¹¹ His use of this source is 58% below of the average, accounting for only 5% of the total of his sources.

How much for this?” [asks the author] “One thousand escudos.” “And the jars?” “For hundred.” “And the tops?” “Ninety. (...)” “Well, give me three, then.” “Three jars?” “No. Three tops.” (:20) [The dialogue proceeds in this way].

“What is your name?” [asks the author] “Tiago.” “And you?” “Pedro.” “And the dog?”

The dog has no name or maybe the children do not know it or do not want to tell the traveller.

[By the end of the chapter the author asks about the name to someone else and is informed about it].

(:32)

“So? Did you like it? (...)” [asks a man to the author]. “Did I like what?” “The village.” “Yes, I did.”(:42)

Another case of the dialogues is that Llamazares makes questions for which he already knows the answer, as the following conversation illustrates, language enactment being seemingly the sole purpose:

[After seeing a board reading “Vidago, spa town”, Llamazares asks a passer by:] “Is this Vidago?” “Yes, Sir.” “The spa town?” “Yes, Sir.” “To where kings would come...?” “Yes, Sir.” “And where are the hotels?” “There is one there.” (:70)

It should be noted that the above dialogues are presented *in full* in terms of their relevance (that is, each dialogue is either reproduced word for word till its conclusion or operates in the same manner in the unquoted parts). It can be concluded, then, that they do not convey any knowledge of social aspects of otherness (unless the principle of avoidance of ambiguity and reification, as per section 3.4 is disregarded); in fact, these excerpts do not amount even to images in a domain of the social world (same section). Although nothing seems to come out of them that might not have been expected – neither in *Trás-os-Montes* nor in any other place or culture in the world – the author takes an active part in them as if he were trying to reach something, a seeming paradoxical attitude of **playing with knowledge** of which, as it seen below, Camilo Jose Cela is the master.

As with Richard Hewitt, Julio Llamazares's social encounters and observations are not established having in mind the search of knowledge on otherness. Hewitt, though, does not make

any explicit reference to that, while the Spanish author makes clear the absence of an epistemological goal in his travelling “without looking for anything in particular” (:227). This is contrary to other authors (such as Paul Hyland, Datus Proper and Franck Arencibia) who state the principles which guide their contacts with otherness. If anything, Llamazares whimsical motives for going to certain places³¹² and on several occasions he performs a tourist search for (local) sights, often mentioned in the tourist guides he carries with him.

Although Llamazares is the most intense depicter of modernity in the corpus dealing with Portugal (as seen above), many of the almost 20 buildings or pieces of urban furniture he makes reference to are previously marked by his guides, and none of them are used for purposes other than being visited (a chapter dedicated to a fireman corporation, page 124, is the sole exception). Apart from two cases of natural singularity, in *Trás-os-Montes* places and physical things are sights because they are attached to an historical event or character or an artistic figure passed away, with the physical remains of the past of the region accounting roughly for a significant 17% of the text (in terms of words). This is a manifestation of a pattern which is called in this study the present(ific)ation of the past, and which consists in the conveying historical information about a place or built element for the sole reason that the author is there, no causal link existing between such information and the present (defined as what the writer on otherness might get in touch with through the senses).

Such important presence of the past – which is felt even more strongly in an important part of the remainder of the corpus, given Llamazares’s share in this regard is the lowest amongst the five works where the phenomenon can be observed – helps to explain why in *Trás-os-Montes* we find the second lowest use of indirect information as source (only 16% of the average in terms of density) despite the fact that its author resorts to guidebooks: guidebooks are not used to construct images of the social world (which are contemporary) but to inform him and his readers about the past. (Actually, it may be difficult to use guidebooks to refer to the present in the first place given that, as Curtis and Pajaczkowska (1994:209) claim, they are characterised by the absence of everyday life.)

There are cases in Llamazares's work, though, where the past does not need to be present(ifi)ed, because in his view it is already part of epoch in which the traveller gets in touch

³¹² On page 163 he decides to visit the village of the parents of a girl he has talked too; on page 233 he goes to a place because he has come to know that Jews had lived there.

with otherness. This can be deduced by noting first that he often experiences “modern” objects and/or people³¹³, while never defining the adjective, which means that the adjective does not hold what would be an internal, social science meaning.³¹⁴ Assuming, therefore, that the writer/reader (external perspective) takes the word in the common sense of “contemporary” or even “futuristic” (the latter still meaning existence in the present, though), one concludes that “ancient” objects and/or people can be experienced as actual when travelling through the region, which operates then as a living museum.

As with Hewitt, several unexpected patterns are found in Llamazares, but this time apparently one does not need pointing to possible methodological insincerity to account for them. First, the Alcarría dialogues are perplexing in themselves, as noted above, because of the simultaneous will to knowledge and retreat from knowledge they entail. Second, *Trás-os-Montes* is less epistemologically empathetic work of the corpus despite his sympathy towards otherness, a fact that could be accounted for by the conceptual differences between both concepts. Third, *Trás-os-Montes* is, amongst the works dealing with Portugal, the most intense in the affirmation of modern society while dealing with a region that statistical indicators present as significantly more agricultural than the average of Portugal, which could be explained by the strong presence of the duality traditional/modern, entailing a strong (absolute, but not relative) presence of images of modernity. This shows the importance of complementing statistics comparing amongst works with statistics comparing within works, as in Llamazares the percentage of images of traditional society is actually higher than for modern society. Such methodological strategy thus helps to solve the above perplexity and the further would-be perplexity of finding an emphasis on modern society along with the present(ific)ation of the past.

Fifth, the pattern of the present(ific)ation of the past is also interesting in itself as a particular and most intense case of what could be called the **paradox of the visitor** (encompassing both the tourist and the traveller). In its general form, it consists in that tourists and travellers believe in the “corporeal travel”’s promise of transcending “mediation processes, or short-circuit representational imagery, through actual arrival at the desired scene” (Noy,

³¹³ In the first 100 pages of a total of almost 250 one finds 12 cases where a town, a city, buildings, squares, clothes, priests, advertising signs, roads, stores or coffee shops are adjectified as such.

³¹⁴ This means that the implicit substantive “modern” does not generate the theme *modernity* here nor even the theme “*modernity*” (quotation marks referring to an external, commonsensical use of word by the author).

2009:219)³¹⁵ while at the same visiting places which have been marked by mediation as attractions (either of the collective or romantic kind, as per Urry (2002(1990))); only the explorer, going into uncharted lands, would seem to be free from such inconsistency. In the present(ific)ation of the past the paradox is intensified because the writer pays attention to a place/feature due to its metonymical, non causal relation to something that happened in/with such place/feature a considerable time ago, fascinated with what Lowenthal (1999)³¹⁶ calls the actuality of the object, (as opposed to a reproduction or a surrogate – or, it could be added, the mediated reference to the object performed by written History). In the ultimate version of the paradox – the paradox of TW and of FLO – the reader accesses such already mediated “actuality” of the object via the mediation of texts.

4.5 – The travels of Paul Hyland and Datus Proper in eternal Portugal

In Hyland's *Backwards out of the big world* the present(ific)ation of the past is the most extent of the corpus³¹⁷. Such record is specially relevant in (a) relation (of contradiction) to the principle Hyland states at the beginning of the journey and the book, affirming he intends to “take the country as it comes, as it offers itself to me” (:2). Contradiction arises not due to present(ific)ation itself – ultimately, the book could have been guided by random tours and encounters and used them as pretext to insert the past – but because of the significant presence of a present(ific)ation which is extreme in several dimensions.

The first type of extreme present(ific)ation consists in the insertion of long excerpts about the History of Portugal. Such excerpts amount to present(ific)ation in that they are (made) part of a book about a country but have no direct causal relation to the sensorial, contemporary experience the traveller writer can have of the country. They amount to **extreme present(ific)ation** because in inserting them Hyland outrightly dispense with things existing in the present as motives to talk about the past (such as the physical remains of the past or the places where “historical” events took place or which used to perform important functions that prompt part of Llamazares's wanderings). Following a practice usual in the TW/FLO industry,

³¹⁵ As seen in the literature review, in fact Noy proposed the concept indirectly, by claiming that the post-tourist does not believe in such possibility of transcending mediation. That does not diminishes, of course, the relevance of his insight.

³¹⁶ Quoted in Wikipedia.

³¹⁷ It covers around 34% of the text, and corresponds to 157% of the average of the authors who use it (all but Chris Stewart).

now the motive is just the fact he is in “Portugal”, an entity he constructs and deals with based on the fact that a polity with such a name has existed for around 800 years (with the interruption of a few decades starting in the sixteenth century).

Chapter 20 of his *Backwards* illustrates this well. It starts by dealing with historical events and figures surrounding *inter alia* the sixteenth century King Sebastião and echoes voices that see his death in a ill-prepared battle (which prompted Portugal's above-mentioned temporary loss of sovereignty) as an escape from marriage. It is only several pages into the chapter that Hyland makes the following transition to the present:

Sebastiao looked for a best man to escort him to the wedding. On that night in the spring of 1578 he waited for him in Jeronimos. In May 1995 Dom Duarte, Duke of Bragança and pretender to the throne, waited there on the eve of his fiftieth birthday for the hand of twenty-eight-year-old Isabel Ines de Castro Curvello de Heredia.

After thus introducing the 1995 marriage (an important event in Portugal which received strong media attention and was attended by major local politicians) Hyland returns to the sixteenth century, where chapter 20 ends.

On several other occasions – and in a second type of cases of extreme present(ific)ation – Hyland insists in trying to establish non-causal associations of this sort between what he is experiencing as a traveller and the past:

A solitary man in a wide sombrero waved a national flag and criss-crossed Avenida General Humberto Delgado shouting 'Por-tu-gal! Por-tu-gal!', a lung-busting mantra. He was off to catch a coach to a football match. General Delgado had been a patriot too (:119). [Immediately follows biographical information on Delgado, a military who played an important role in the opposition to the twentieth century authoritarian regime of Estado Novo and who was murdered by the political police.]

Here, the link between the description of the observation of the traveller and the historical event he writes about is twofold but rather loose: patriotism (but of radically different sorts, as one sort involves supporting the national team and the other is not even necessarily patriotism, but a fight for democracy with the serious consequence of death); and name (the avenue bears the name of the General, but the city in question played no special part in his life, so any other

avenue in any other city could serve as motive). These are then extreme cases of present(ific)ation in that the association with the past is not metaphorical/analogical (in which some logical connection would be felt) and not even of the metonymical type (absence of a clear geographical connection, as in the general case of the present(ific)ation). Such variety could thus be called **mystical present(ific)ation** in that through some mysterious force both temporal dimensions are connected (much as the mystic with God).

It is no surprise, then, that Hyland confers similar ontological value both to present and past Portugal³¹⁸ (along with Datus Proper, as seen below in this section). “Ancient Portugal”, as he puts it, is reachable not only through the writings of History, but can be experienced directly. On page 194, after a long excerpt on the medieval Knights Templar, Hyland writes: “To get to Tomar I took a bus through contemporary Portugal, seamlessly changing from one temporal dimension to the other”; and on page 158, he adds that “Soon the bus was almost empty and driving through medieval Portugal”.³¹⁹

The country is even presented as a personality having lived throughout its 800 year of existence as a polity:

I want to find out how Portugal – discoverer of most of the world, founder of the first modern empire and, once, the richest country on earth – gets on with being not great any more. (...) Left on the shelf at Europe's edge, Portugal has had to shift its gaze from the ever-seductive horizon, turn its back on the ocean and flutter its eyelashes at Brussels. I'm going upriver in the direction, as far as Alcántara in Spain, to find out where Portugal begins and ends. If it's lost its role and its riches, at least can be not-Spain. (:10)

³¹⁸ In moral terms, though, the present seems to be inferior, as he describes it immediately: “The Tupperware factory, a little bit of Salt Lake City. Mighty works between Abrantes and Entroncamento, a swathe of dishevelled land through pine and eucalyptus forest, the new east-west road that links the Lisbon-Porto highway with Spain.” There, Hyland finds “Montalvo, a notable parish swallowed up by development.”

³¹⁹ Such use of such adjectives is in fact commonly observed in FLO to the point of being seen as a cliché, but this does not mean of course is not worth analysing it as an element of a world vision endorsed by the writers who use them and readers who read such writers. These two quotations also show the methodological relevance of performing both a qualitative and quantitative analysis, as the quantitative analysis does not consider these quotations as evidence of the general view of the author, given they are not images of the social world. The theme *past*, which captures the past materializing in the present (see section 3.8 for the definition of themes, which are always based on images of the social world) without presupposing the conflation of the two temporal dimensions, is not much relevant in quantitative terms for Hyland (being 33rd in his rank of themes in terms of density of extension, corresponding only to 0.8% of total density of extension of themes). It is, though, quite relevant for the other authors writing on Portugal (it ranks between 3rd and 6th and between 5.0% and 7.9% for these).

“Portugal” – not being clear whether this is the state, the people or some sort of timeless *zeitgeist* (accounting here not for distinct culture of an epoch but for the distinct culture of a space) – has been always the same; only its standing in the world and material situation have been transformed, so Hyland can enquire into its reaction to such changes.

Here one could counterargue that in trying to know how Portugal “gets on with being not great any more” the British author is merely asking in a metaphorical way a question that could be more sociologically formulated as “How does the memory of Empire affects contemporary Portugal?” In the remaining of the excerpt he seems, however to be treating “Portugal” as a timeless entity, holding that such name has since 1143 represented the same entity in more ways than merely the sovereign dimension. This, of course, is ignoring that Portugal in the sixtieth century was much more similar to other countries and societies of the time than to the Portugal existing in the time of Hyland's travel. Conversely, the latter – which, in his view, can only be “not-Spain” to define itself – is very much closer to Spain than to such polity of the sixtieth century..

It should be noted, finally, that this relevance of the past does not make Hyland specially distanced from the present social world, as he is located in mid rank in terms of density of images (85% of the average), average generality (87%) and extension of knowledge of the social world (73%); concurrently, his use of informants is second in terms of density (147% of the average). Interestingly for someone who explicitly departs aiming at explanation («I want to find out how Portugal...») the use of such form of knowledge is minimum (second lowest in terms of density and a composite index value of just 0.8% of the average).

Although the phenomenon of the present(ific)ation of the past is less important in extension in Proper's *The Last Old Place* than in Hyland, it still occupies a significant portion of the text³²⁰ In the title itself and when he claims (:30) that Portugal “cannot be navigated in length and breadth [and that there is the] third dimension (...) time”, Proper also performs a conflation of past and present times. Very similarly to *Backwards*, this has consequences in his journey plan:

Adriano [(a Portuguese friend and informant)] and I will therefore jump back and forth from now (...) to earlier times. We will do this repeatedly throughout our journey, because there is no other way to

³²⁰ 15% as against 34% in the latter.

see the country. The flashbacks of a few years should be easy to follow, but we will also visit the fifteenth century in Sagres, the fourteenth in Aljubarrota, and the second century B.C. in Viseu. (:30).

As with Hyland, for Proper the “Portugal” with which he has direct contact through his senses is not the whole of the country, historical facts being necessary to grasp it fully; fortunately, here “time travel is easier because progress has not paved the countryside” (:31). Differently from the other authors of the corpus and even from Hyland, though, here the past seems to have superior ontological value relative to the present, as it is established from the start which are the historical periods to be considered and what are the sites/sights in which such historical periods can be reached³²¹, and no *a priori* forms or places where to grasp the present are mentioned.

Apart from this important difference, *Last Old Place* does not present many extreme quantitative values in structural terms. Unexpectedly, though, given the author travels in the company of his Portuguese friend Adriano, his use of informants as source of knowledge is not high.³²² Adriano is, notwithstanding, an important source of images of the social world of Portugal in qualitative terms.

Hyland thus shows how a detailed analysis (and not necessarily a quantitative one) allows one to identify contradictions. We have seen a mismatch between a proclaimed epistemological methodology of taking “the country as it comes, as it offers itself to me” – clearly based on the promise of transcending mediation through direct experience – and the frequency of present(ific)ation, giving pre-eminence to the past. Moreover, in some case present(ific)ation is established through weak connections between the two temporal dimensions – Hyland as a poet thus penetrates Hyland's non-fictional writing, verging on the violation of the pact of factual reading – in (another) contradiction with their proclaimed unity. Finally, the identification of such patterns also show the importance of interplay between a priori theory and induction from observations in the text.

³²¹ The reader can obviously imagine that the visits to these places have already taken place when the plan is being written. It is also likely, however, that the reader remembers Proper has lived in Portugal previously and think he might have selected the places based on the knowledge such experience has provided him, thus maintaining the belief that the time of the book is the time of writing of the book. Be as it may, ultimately this is how the author wants to be portrayed as a persona in search of knowledge.

³²² Fourth lowest in density terms with 60% of an average much affected by the extreme value of Arencibia's *Spain*, which reaches 290% of the average; the corresponding composite value is in mid rank (but only at 21% of the average, which is again influenced by extreme values).

4.6 – Chris Stewart(s') *Driving Over Lemons* down to earth

This work stands out amongst the authors writing on Spain as the as the highest on traditional society (both in density and extension). Given it also presents the highest within-work share of images of traditional society amongst that set of writers, its lead becomes even more evident in composite terms.³²³ As expected given the fact that this migrant author spends most of the text/time in a confined (social) space, his average index of generality (1,4) is the lowest in the corpus (68% of the average) and the percentage of level 1 and level 2 images is overwhelming (98%). Contrary the three authors analysed until now, Stewart almost does not present knowledge that refers to entities with a degree of generality higher than the social spaces which he contacts with directly. At the same time, he is one of the three authors in the corpus not performing present(ific)ation of the past, which matches the fact that, despite the strong presence of traditional society in his work (as referred above), he shows up basically as rendering his experience as he had it, not engage in any type of nostalgic attitude or behaviour.

Another consequence of Stewart's context of the contact with otherness is that many descriptions of agricultural/animal husbandry activities do not show up as images of the social world because they refer to the same entity, that is, his farm (this obtains even in an external analysis perspective, because one can assume the reader is aware of when different excerpts on the subject refer to that same entity). This explains to a great extent why in *Lemons* 21% of the images of the social world are of agriculture/animal husbandry, comparing, say, to *Trás-os-Montes*, where Julio Llamazares visits some (small) urban spaces, with the ratio reaching a significantly higher 31%; contrary to a static Stewart, Llamazares moves through a landscape with a level 2 of generality in which agriculture predominates over uncultivated land or land put to industrial use. Confirming the farm and surrounding area as the basis of Stewart's knowledge and his confinement to his experience, his extension of knowledge of the social is the lowest in the corpus (on a pair with Polly Evans), and he is the sole author who does not use indirect information, resorting to description and observation overwhelmingly.³²⁴

³²³ 3 times the average for density and 2.6 times the average for density of extension.

³²⁴ 91% and 84% of the total number of forms and sources used, respectively, in both cases the highest shares in the corpus.

If one considers the present(ific)ation of the past as a detour vis-à-vis what would be the main subject of FLO books as established by the pact of factual reading – that is, the contemporary otherness (mostly) experienced in first hand – then Hewitt is probably the author of the corpus most respectful of such pact. This appreciation is reinforced by the abovementioned facts that he is the sole author not using indirect information and the one who has the lowest average index of generality in the corpus (with these two results showing the potential of the quantitative analysis in establishing strong and otherwise unseen conclusions). The sole remarks as to the claimed non-fictionality of the work regard the title (which wrongly suggests a road trip) and the subtitle (the setting is a small region of Andalusia), possible editorial impositions which may alienate some readers of *Lemons* from reading its sequels.³²⁵

4.7 – A bike epistemologically light: Polly Evans's physical effort³²⁶

Written by a tourist, this work presents the lowest density of images of the social world, a result obtaining also in composite terms³²⁷, the extension of knowledge of the social being also the lowest. This latter result is on a pair with Stewart (as mentioned above), but in Stewart's score weighs significantly the fact that he shows the lowest degree of generality of the corpus (which is associated with its attachment to direct experience), so that he can be considered epistemologically more profound. Tourist Evans and migrant Stewart are therefore differentiated in their writings texts in accordance with what would be expected given the differences in their circumstances of contact with otherness (which established their status in the first place, as per section 4.2 above). Evans does not fully fit the figure of the tourist in terms of endogenous variables, though, as her composite value for explanation is high³²⁸, mostly due to a very high within-work share³²⁹.

³²⁵ *The Almond Blossom Appreciation Society* (2006) and *A Parrot In The Pepper Tree* (2009).

³²⁶ *It's not about the tapas* echoes *It's Not About the Bike: My Journey Back to Life*, an autobiographical book by Lance Armstrong, the cyclist disgraced due to doping (written with Sally Jenkins).

³²⁷ 47% of the average as regards density. Although the author is near the average in what regards the within-work relevance of such form (73% of total images of the social world in terms of density, that is, 104% of the average for this indicator within the corpus), she reaches only 53% of the average in composite terms.

³²⁸ Second in rank, at almost twice the average of the corpus.

³²⁹ Almost 3 times the average, although second to Arencibia's *Spain*. In terms of density explanation it is mid-rank, reaching 121% of the average of the corpus.

Another salient feature of *It's not About the Tapas* is its high extension of present(ific)ation of the past³³⁰; it should be noted, though, that the author does not conflate past and present, nor defines otherness as something timeless as Datus Proper and Paul Hyland. Instead, Evans engages in standard present(ific)ation (in opposition to Hyland's weak or forced present(ific)ation) most of the time³³¹, while sometimes explaining current states of affairs or establishing other types of connection with the past³³².

The answer to the question whether gender is relevant in this work written by a woman depends on the definition of feminine traits, which is of course quite contentious in social science.³³³ Even without assuming a position within this issue it is worth mentioning as specific features of Evans' writing the relations with the opposite gender in the light of her status as a single woman.³³⁴ Although some of the male authors of the corpus occasionally praise the beauty of a woman they find on the way and Franck Arencibia talks about the qualities (and lack of them) of Spanish women as wives (section 4.9 below), they are never themselves participants in a scene where gender is relevant, as it happens with the author of in *Tapas*. Evans also expresses physical and psychological frailty (some of these aspects, as can be seen below, are shared with Miranda France, the other woman writer of the corpus) in opposition to the supposed tendency of

³³⁰ Second in corpus, occupying 23% of the text.

³³¹ We thus see her writing that "Hernani might seem a boring suburb best known for its cider, but one particular cider mill in the village has a valiant past" (page 31), after which she tells an episode of Second World War; on page 37 she uses the same mechanism to talk about accusations of witchery in the seventeenth century and later to mention the lives of Spanish figures such as Goya, Gaudi, Dali or Lorca. The weak form of present(ific)ation sees her far from the actual place of the past events being described: after informing the reader she is on a road which is part of the Camino de Santiago (page 50), she dedicates several pages to the city and its history, despite being hundreds of kilometres away from it in her tour of Spain.

³³² The exception to this is the suggestion that the current rivalry between the main football clubs in the country (one from Madrid and the other from Barcelona, the two biggest cities) comes from dictatorial times (page 115). Other possible causal connections between different times are the reference as to when certain traits of the present started in the past; that is the case of the use of the beret by the Basques (page 39) or of the fact that "the Spanish are very enthusiastic about eating pork. Apparently it all goes back to the Reconquest" (page 46).

³³³ For a discussion of this issue within TW, see section 1.6. As argued in that same section, one does not need to presuppose the existence such traits to expect differences in women's FLO vis-à-vis texts of the kind written by men, as certain differences can be assumed as stemming from social expectations regarding gender within otherness and such different expectations tend to entail different experiences.

³³⁴ This is epitomized in an encounter (:54), with a "hairy-chinned mountain men", who after hearing her cycling plans comments: "'Dios mío, your thighs must be very strong,'" looking at them "shamelessly" and adding: "And you are all alone? You have no husband?", to which the cyclist answers: "Well, no, (...), the muscular, intelligent, witty, rich sex god that I was intending to collar as a life partner hasn't shown up yet. I'm holding out hope, though. I've got several years left in my ovaries before all my eggs shrivel up and die and even then, there are still loads of girl babies for sale in China. The question of motherhood is also present on page 175, in an interaction with a German tourist: "'Um Himmels willen! [For God's sake!] You cycle all that way all by yourself? You haff no husband?' (...). She looked protectively at little blond Gretchen by her side, clearly hoping that her own little treasure would never do anything so ridiculous - whether that be to cycle round a foreign country alone or to reach the age of thirty one without a husband, I couldn't quite be sure.'" (page 175)

the male gender to hide such feelings. This is summarized when, halfway through her first day of pedalling (:35-36), Evans confesses that "...by now I was an emotional wreck. The fear had set in. My confidence had dived. I was convinced I'd taken on more than I could manage" (:35). She then talks (not without some traces of irony) about her nostalgia for an idealized past where the fragile feminine condition was better understood and supported³³⁵

Such hesitations and their confession fit Lisle's (2006:95) indirect definition of the feminine (as per section 1.6), which holds that masculinity gives "men the objectivity through which they can identify and dominate difference, and it helps them repress any feminine characteristics that might reveal weakness on the journey"; they are also close to Roberson's (2001: xiv) when she highlights sexual vulnerability and objectification at the hands of men one reason for differences between the experience of travel and mobility by women vis-à-vis that of men. In the case of Evans, though, difficulties end up by transforming «a flabby nervous wreck [in]to a taut, lean woman in total control» (:289), interestingly following the dominant motives – sport and athleticism – Procida (1996:74) found in British travellers in Tibet in late nineteenth century.

In summary, the circumstances of the contact with otherness are here at work, correlating with the different epistemological attitude between Evans and Stewart.³³⁶ At the same time, the quantitative multi-indicator approach followed proves its worth in the subtle identification of a difference in the degree of generality between both authors and in the slight mitigation of Evans as a tourist writer due to the relevance of explanation in her *Tapas*. Finally, in combination with the qualitative approach, it noted the high level of present(ific)ation of the past in the work, while a purely qualitative approach showed the relevance of gender.

³³⁵ "Oh, to have lived a couple of hundred years earlier! (...) Any glimmer of a problem (...) you could take a nice big breath and the restrictions of your corset would send you into a very feminine faint. By the time everyone had finished rushing around wafting smelling salts, they'd have forgotten all about whatever awful thing you had done and you could retire weakly to your bedroom with a headache. As it was, I was a child of the post-feminist age; I was meant to be able to hold on to a husband, a high-paying job *and* my sanity. I'd failed at all three."

³³⁶ Such relevance will not hold, however, for the whole of the corpus, as per next chapter.

4.8 – Miranda France's research in Spain and La Mancha

In *Don Quixote Delusions*, as in Polly Evans' *Tapas*, above, the issues of the relations of the author with the opposite sex and of motherhood are possible specificities arising from gender.³³⁷ It is left to be argued, once more pending upon a definition of feminine, whether one could consider a feminine characteristic the fact that France leads by far the corpus in what regards densities of understanding and mediation³³⁸, as well as the corresponding within-work shares³³⁹, resulting in high composite indexes for such forms of knowledge³⁴⁰. The same reasoning applies to the high of level explanation³⁴¹ and the high level of epistemological empathy³⁴².

As in Llamazares, the distinction between this later indicator (which intends to translate a tendency to *act* in a certain way as regards the gathering of knowledge) and sympathy towards otherness (a positive *attitude* towards otherness) is quite relevant. In contrast with her high level of epistemological empathy, France cannot be said to be much sympathetic towards otherness in that she shows the second highest negativeness index in the corpus. Doubt remains, then, as to the claim that TW by women is more “oriented towards others” (Clark, 1999), mostly so when Evans, the other woman in the corpus, presents the opposite results (not very high epistemological empathy³⁴³ and very low negativeness³⁴⁴).

³³⁷ France's condition as pregnant facilitates social contacts on two occasions. On page 151, after it is mentioned she was a future mother “suddenly all attention switched from the dancers' bellies to mine”. On page 212, visiting a gypsy camp, she writes: “Marginalised and ostracised on the edge of Spain's cities, gypsies harbour a deep-felt mistrust of the non-gypsies (...) Perhaps pregnancy went in my favour. At any rate, the man [the author finds in the camp] decided to be hospitable. Such condition is also a pretext for France to talk about fast-food chains in Spain, motivated by the urgent desire for such type of food (page 61) and can be supposed as an underlying cause of her emphasis on the issue of Spain's low birth rate, which surfaces on several occasions. In one of these, at the end of the book (page 220 and subsequent pages), France takes her six-month-old baby to the village of El Colacho to participate in a ceremony in which an individual dressed as “the devil” jumps over recently born children (who, according to a local woman are now much few than in the past) in order, following to tradition, to grant them protection. France's womanhood is also relevant on pages 213-216, in which she describes a meeting, in Segovia, with a psychoanalyst from Madrid who had travelled there to give a lecture on Freud's attachment to Cervantes, thus prompting the author to focus again on *Don Quixote*, with the encounter finishing as the man “made a clumsy attempt to kiss me”.

³³⁸ 333% of the average and 274% of the average.

³³⁹ 6 and 7 times the average.

³⁴⁰ 3.7 and 4.7 times the average.

³⁴¹ Second in corpus in terms of density, reaching 171% of the average and third in terms of within-work share and composite terms.

³⁴² Between around 260% and 275% of the average when not considering assessment and between 285% and 290% when considering it.

³⁴³ Fifth in ranks, at between around 80% and 90% of the average.

³⁴⁴ 23% of the average, penultimate in rank.

Irrespective of gender issues, France is the author of the corpus closer to the figure of the social scientist in her epistemological process³⁴⁵ – but mostly so of the journalist, as she does not (explicitly) follow social theory – by presenting otherness in (more) profound and diverse ways. First, her density of extension of knowledge of the social is the highest in the corpus³⁴⁶, being reached through a high degree of generality³⁴⁷ and a high density of images³⁴⁸. Second, she resorts actively – that is, with epistemological premeditation (section 4.2 above) – to a rich variety of forms of knowledge, showing the second most even distribution in this regard³⁴⁹. Third, a similar, albeit less pronounced result obtains in terms of sources of knowledge, with France located in lower rank³⁵⁰. Fourth, indirect information is quite relevant in *Delusions*³⁵¹, including in terms of composite value³⁵², while the highest value in corpus by far in terms of use of informants^{353 354}.

This does not mean that the author resists the present(ific)ation of the past. Besides performing it in 22% of the words in *Delusions*, in a significant extent of her text France does so in a unique way vis-à-vis the remainder of the corpus. While the other authors performing present(ific)ation refer only to historical events (as seen above as can be seen below in the case of Camilo Jose Cela), France shows a double distancing relative to what a visitor can experience directly within otherness. Like them, she first displaces herself physically into contemporary Spain and then travels back hundreds of years, dedicating 4.5% of her text to History *tout court*, or 20% of the words dedicated to the present(ific)ation of the past. France then distinguishes herself by spending a remarkably high 74% of the excerpts where present(ific)ation takes place in a

³⁴⁵ She is far from the modern anthropologist, though, in as much as the minimum standard sojourn prescribed in the observed community in this case is two years (Sardan, 1995:74).

³⁴⁶ 166% of the average.

³⁴⁷ Value of 2.49, second in rank, 120% of the average.

³⁴⁸ Second in rank, 139% of the average.

³⁴⁹ Standard deviation which is 76% of the average, see Table B.6 on section B.4 of Annex B. (A perfectly even distribution between the 5 forms would result in a standard deviation of zero.)

³⁵⁰ Lowest standard deviation in the corpus, as per Table B.13.a, on section B.6, Annex Be, page 292.

³⁵¹ It accounts for 20% of its images of the social world, being second highest in this regard, with twice the average of the corpus for the within-work share of this source.

³⁵² Second highest in rank, at 2.5 times the average.

³⁵³ Density of the use of informants is 2.9 times the average of the corpus (with the second author in rank in this regard reaching 1.7 times the average). Informants are 23% of total forms, a within-work share which is 2 times the average (with the second author in rank in this regard reaching again 1.7 of the average).

³⁵⁴ The contrast between the frequent use of informants and the second highest level of generality in corpus is not necessarily perplexing, given that informants can provide information not only about their situation (degree of generality 1), but also of their near surroundings (degree of generality 2) and even at national or societal scale (degree of generality 3). Examples of the latter case are abundant in France's book (for example, a private detective and a psychologist provide insights about the nature of the Spanish).

textual regime resulting from a *third* move, now into the into the realm of *Don Quixote* and the world of its author Cervantes through references, quotations, summaries and comments made by directly by her or indirectly by other people on the novel and Cervantes proper.³⁵⁵

The a) excerpts dealing with the novel and the life of Cervantes are a theme of the book in themselves in that they have strong autonomy vis-à-vis b) the Spain contemporary of France's travel; as far as it can be read, the only common thing between a) and b) is the underlying geographical/political space, as in standard present(ific)ation. But in France standard present(ific)ation covers only 4.8% of the text where present(ific)ation in general takes place: amounting to a **second form of extreme present(ific)ation** (the first being **History tour court**, as seen above in France and also previously in Hyland), part of the past considered by France is a work of fiction – not subject to the pact of factual reading, then – that begins “Somewhere in la Mancha, in a place whose name I do not wish to remember...”³⁵⁶ and that is vaguely set in “Spain”.³⁵⁷

Somehow in contrast to such relevance of present(ific)ation, the theme *past* is not present in France's rendering of Spain, while there is considerable presence of modern society³⁵⁸ and near average values in what regards traditional society. Adding these two observations to the abovementioned marks of gender, variety of forms and sources of knowledge and several types of past, France epitomizes within the corpus the travel writer as an aggregator of multiple types of information associated with the denomination “Spain”, which here covers both present, past and even fiction (albeit without explicitly violating the pact of factual reading).

³⁵⁵ 16% of all *Delusions* consist of such regime, while the other authors of the corpus who operate similar regimes do so to a much less extent.

³⁵⁶ My translation from the original “En un lugar de la mancha cuyo nombre recordar no quiero...”.

³⁵⁷ *Quijote* and its heroes can generally be said to be part of the “cultural imaginary” of Spain, and therefore have causal effects, but these are not addressed by France. She also presents some more direct connections between such past and the present, but they are clearly non causal. As an example, one finds at the beginning of the book a description of a public, collective reading of Cervantes's work in Madrid, which France witnesses and which occupies just 0.4% of the text (2% of present(ific)ation). Also, on page 221 it is possible to read: “...I opened a copy of *El pais* [a Spanish newspaper] one day to find an article full of Quixote's shortcomings. 'He always wanted to be in the right and he never paid for his drinks', complained its author, Manuel Vincent. 'The history of Spain, the conquest of America and Castilian literature would all have been much better if we had taken as our example Sancho Panza, with his irony, pragmatism and the enjoyment of simple pleasures, instead of that lunatic stuck in the past.'

³⁵⁸ Second highest scores amongst the writers on Spain in terms of density (211% of the average) and extension (274% of the average).

4.9 – Frank Arencibia's negative *Spain*, or the work(ings) of prejudice

As briefly mentioned in the section introducing the corpus (chapter 1), this work is very different from all the others being studied in its proclaimed ambition, format and ways of arguing. While experience organizes the narrative in a chronological way for all other writers in the corpus, fitting Stagl's (1995:203) view of the structure of the travelogue, in Arencibia the information is presented synchronically, arranged by topics, fitting Stagl's view of the structure of the ethnography. Similarly to the classics of the latter genre, in his *Spain* he also intends to draw a portrait of a people/culture³⁵⁹, albeit the dimension of the object is different (a nation of around 40 million people as against the typical tribe or community with hundreds or at most thousands or members).

Within each of the major topics into which his work is divided, Arencibia makes propositions mostly with a level 3 of generality (that is, referring to the whole of Spain, although he sometimes makes exceptions to this in referring to sub-areas or peoples of the country, such as Andalucía or the Catalans); therefore, he shows the highest degree of generality of the corpus³⁶⁰. To convey such general images the author uses the ethnographic present (Crapanzano, 1986, details in literature review), as seen in the expressions of the sort “the Spanish are...” or “the Spanish do...”, with (more) concrete cases (levels of generality 1 or 2) following for illustration/proof. Arencibia's reasonings almost always fits this sequence, rarely engaging in what could be a process of rhetorical induction (Edmondson, 1984:2, details in literature review) in which the use of a specially communicative example or the accumulation of examples tries to persuade the reader about general propositions.

Arencibia also leads the corpus by far in what regards the use of indirect information³⁶¹, a fact which matches his high level of abstraction (given indirect information is rather prone to convey general images, more, say, than observation or informants); likewise, his use of reflection, a source of knowledge which involves abstraction³⁶², is the highest of the corpus³⁶³.

³⁵⁹ This is evidenced by his subtitle and the claims that “You are about to read what it is like to live in Spain.” (page 1) and that “I have described the real Spain - the one that tourists never experience.” (page 281).

³⁶⁰ Value of 2.9, at 140% of the average. His within-work share of level 3 which occupies the same position in rank, as 91% of his images are level 3, only 1% being level 1.

³⁶¹ First in rank in terms of density (2.7 times the average), within-work share (3.7 times) and in composite terms (5.0).

³⁶² According to the definition in the methodological chapter (section 3.8) in *reflection* an author generates or expands knowledge by adding his or her view to information obtained through one or more of the other three types of source.

Moreover, despite being a migrant and therefore expected to establish deeper and more frequent social (and epistemological) relations with locals, Arencibia is the second less intense user of informants, much far from the averages of the corpus in this regard³⁶⁴, while a similar pattern, even slightly more clear, obtains for observation³⁶⁵.

As regards content, the American author presents low values in terms of traditional society amongst the authors writing on Spain³⁶⁶, an expected result given he spent his long Spanish sojourn in one of biggest cities in Europe and capital of a country with a “very high human development” at least since 1980³⁶⁷ (albeit Iberia has been located in an intermediate position by several sociological analysis, as per section 1.6). In *Spain*, though, one also finds also low values in what regards modern society³⁶⁸, a surprising result considering the abovementioned location of the author. To some extent this is accounted for by the minor overall significance of the pair traditional/modern for Arencibia³⁶⁹; it is still to be explained, though, why the images included in the duality are divided so much in favour of traditional society (80%-20%). A possibility is the abovementioned high degree of generality, which implies Arencibia transcends Madrid (a level 2 object), together with the fact that absence of rationality, an element of traditional society (see section 3.9) is very frequent in Arencibia’s description of Spain³⁷⁰.

By thus denying rationality to the Spaniards, Arencibia affirms clearly the difference of otherness, which together with other images amounts to an overall picture which is by far the

³⁶³ First in rank in terms of density (2.3 times the average), within-work share (1.7 times) and in composite terms (3.3).

³⁶⁴ 33% of the average in terms of density; 24% in terms of within-work share and 5% in composite terms.

³⁶⁵ The composite use of observation is the lowest on a pair with Evans, at 44% of the average, resulting from a density which is 82% of the average (second lowest) and a within-work share which is 55% of the average (the lowest).

³⁶⁶ Last in rank in composite terms (18% of the average) and mid-rank in terms of density (but only 76% of the average).

³⁶⁷ This means inclusion in the top quartile of UN’s Human Development Index, which includes the majority of the countries in the planet.

³⁶⁸ Penultimate in density relative to the authors writing on Spain (28% of the average, only surpassing Chris Stewart, the author who spends most of his time within otherness in an isolated farm in rural Andalucía); bottom of rank in composite terms. The composite index in this case is worked out considering for each work a) the within-work share of images of the social world conveying modernity relative to those conveying either modernity or traditional society and b) the density of modernity in percentage of the average of the corpus.

³⁶⁹ Arencibia's percentage of images classified within the pair (13.5%) is the lowest within the writers of the corpus focused on Spain. This excludes *Backwards Out of the Big World* and *The last old place* which, being focused on Portugal, present only 7 images of the social world referring to Spain. Such exclusion applies to this whole analysis of Arencibia in relation to the duality traditional/modern.

³⁷⁰ The theme *rationality / reflection / precision - absence / low level and superstition* is the fifth most important in the book both in terms of density (7.3% of total) and density of extension (7.6%).

most negative of the corpus^{371 372}. Surprisingly, such bleak view is not accompanied by low epistemological empathy³⁷³. However, several patterns of presentation of knowledge show a negative epistemological predisposition towards the otherness (which may be considered as belonging to the qualitative dimension of epistemological empathy)³⁷⁴:

a) presentation of statistics (which can be deemed negative irrespective of culture in absolute terms) without contextualizing/comparing them;³⁷⁵

b) presentation of statistics (which can be deemed negative irrespective of culture) in which Spain leads (comparison existing, then) without presentation of a single comparative statistic regarding which Spain is in a more desirable position.³⁷⁶

c) when positive images and negative images are presented simultaneously (assessment being performed, then), negative images are always presented last, conveying the impression they predominate.³⁷⁷

³⁷¹ The index of negativeness is 3.32 times the average of the corpus, with the second author being quite distanced, at 1.45 times the average. Last subsection of section 10 in Annex B presents a detailed analysis of the negativeness of Frank Arencibia's Spain which confirms a clear negative view of Spain even if only the most obviously negative themes are considered, those for which a slight subjectivity might exist are excluded and *all* positive themes (even the slightly subjective ones) are considered. This result seems even to make irrelevant (at least in the case of Arencibia) the methodological insufficiency that the negativeness index does not account for the intensity, considering that each negative (or positive) image has the same negative (or positive) impact as all other negative (or positive) images.

³⁷² The exception to the overwhelming presentation of universally negative images of Spain is a section entitled "Positive virtues" (starting on page 66), in which he writes that "Spaniards are fundamentally honest, direct and upfront with what they have to say. In general, they are characteristically non-hypocritical and they straightforward with their feelings. Spaniards will tell you how they feel, or what they think, in a not-so-delicate way - diplomacy has never been their forte."

³⁷³ Epistemological empathy sees Arencibia in mid-rank: *Spain* varies between third and fourth place and between 120% and 100% of the average when not considering assessment; when assessment is considered it ranks fourth, his index values varying between 100% and 90% of the average, as per graphics on the corresponding section on Annex B.

³⁷⁴ This should not be confused with another qualitative dimension – that of antipathy, as per theoretical discussion of sympathy on section 3.7 and concrete cases of sympathy in Llamazares on note 304 on page 163, above.

³⁷⁵ «In the province of Alicante, there is a car accident every seven minutes. In Madrid and Barcelona accidents are even more frequent: every two minutes and forty-five seconds in Madrid; every three minutes and eight seconds in Barcelona. Nationwide, 6,000 people die yearly in traffic accidents (page 39).

³⁷⁶ As an example, one can read on pages 63-64: "Of all the nations in the European Union, Spain has the unfortunate lead in AIDS and HIV patients; one income households; the lowest paid university graduates; the highest percentage of youth who have tried illegal drugs; the highest housing costs and the highest amount of drivers who run red lights. Spain is also the country that commits the most environmental infractions in the union (for which / it is often reprimanded by Brussels). Moreover, Spain comes in second on other negatives such as infant mortality, school dropouts, inflation, illegal CD's / DVD's and cannabis consumption."

Many other examples of an *a priori* unfavourable disposition towards otherness can be found, some of them going to significant extremes, for example as regards Spanish conventions on time:

Words such as 'night' and 'evening' have specific connotation in any language. But you'd better be extra specific in Spain. The morning lasts until 2:00 p.m. and night starts at 10:00 p.m.

This can be considered clearly negative considering the general tone of criticism of the book and, specifically, when considered together with the following complaint regarding the region of Catalonia (without any further mitigating comments being made on the rest of the country):

restaurants are closed and refuse to accept customers until they are ready to serve at the official Spanish meal times. The only place in Barcelona I could find opened for lunch at midday was Burger King. At night, restaurants turn patrons away because they are not ready to serve dinner before 9:00 p.m.” (:116).

These are rather negative perspectives in that, even if one takes only the point of view of the author (assuming he is not interested whether the Spaniards are happy with these conventions) he seems to forget that up to a point he could adapt to this – and keep his habits as to meal times and other scheduled activities – by changing his own conventions³⁷⁸. Even from such ethnocentric/egocentric point of view a fair critique should be instead aimed at the number of hours mediating between certain activities, e.g. commencement of business and lunch interruption or opening and closing times of shops and public authorities, in which differences may exist vis-à-vis Anglo-Saxonic countries.

³⁷⁷ This is observed, for example, in the above-mentioned example of page 116 (“in spite of their reputation for doing things better than the rest of Spain, Catalonia still shows its Spanish side”) and in page 113: “New Metro lines and stations are being built [in Madrid] (...). But as the new stations are built, older stations are neglected”.

³⁷⁸ Establishing that, say, “9:00 p.m.” for Spaniards would mean “7.00 p.m.” for him or whatever time he would find suitable to have dinner (accordingly, “2:00 p.m.” for lunch would not be so late anymore for him). Of course, this might have implications difficult to accommodate on the face of stringent requirements as regards the time the author would go to sleep at night and the time he would wake up in the morning – say, if he needed to sleep at least 2 hours after dinner and would have to wake to start working at office hours in the morning.

Similarly showing no capacity for accepting difference not even as regards signifiers, (in a section ironic titled “The Most Cultured and Educated People on Earth” which deals with the supposed ignorance of Spaniards), he writes:

Spanish geography also claims there are six continents, as opposed to seven, since Spaniards consider North and South America one continent and call it America. Frankly, I had no idea that Geography could be such a confused and controversial subject. (:165)

Although these cases were identified through an internal analysis, it could be argued that they could be detected by many a reader not working systematically on the text. Should that happen, one would have a case of (lack of) *logos* (logical arguing, one of the elements of persuasion in Aristotle's *Rethoric*³⁷⁹) undermining *ethos* (a second element of persuasion, referring to the authority of the speaker or writer).³⁸⁰ Arencibia thus seems to have wasted the capital with the reader he might have commanded due to this relatively privileged relationship with otherness as migrant, having spent several years as a participant in Spanish life by working locally – this, despite having proclaimed an intention towards objectivity and even shown an epistemological intention of gathering systematic knowledge about the country by organizing his work by topics.³⁸¹

³⁷⁹ Quoted in Edmondson (1984).

³⁸⁰ Likewise, the fact that *Spain* is a self-published book could somehow be related to the difficulty in convincing the publisher of the soundness of the argumentation, an intermediate figure between the researcher and the reader performing a deeper analysis of text than the former.

³⁸¹ A (rather speculative) psychological explanation would justify in part so strong a bias on someone with a more than minimum intellectual sophistication on the grounds of a failed relationship between the author and his Spanish wife (with whom he moved to Spain, according to his own account), such failure being in itself a speculation based solely on two elements of the text, as follows. On one hand, in describing Spanish women, Arencibia holds that “their aggressiveness, moodiness and lack of passion make them unviable candidates for a successful relationship”. On the other hand, he transcribes dialogues with his father-in-law and brother-in-law as examples of the generally held view that “Greeks are Latin” (a campaign having been launched throughout the Spanish media to disseminate the thesis possibly because, according to the author, the queen of Spain is Greek and that would foster unity and goodwill between the two nations). Such dialogues do not portray in a good light these two members of his close family: his father-in-laws argues Greeks are Latin because they are European; that French are not Latin because they are not in the Mediterranean; and that Cubans are not Latin, but Caribbean, denying the original thesis years later. In turn, his “his younger, alert and more reasonable thirty year old son”, holds that “Greece is even more Latin than the Romans because they developed before Rome”.

4.10 – “Don’t call me Sir”: Camilo Jose Cela and the subversion of the horizons of expectation of travel writing

The Nobel Prize of Literature shows up in his *Nuevo viaje a la Alcarria* as considerably intense in terms of knowledge, his density of images of the social world being the highest in the corpus³⁸²; such result is magnified – possibly putting the author in the first place in rank in tandem with Miranda France in such regard – if one considers also its outstanding position in terms of the pair tradition/modernity³⁸³. This epistemological depth is clearly at odds with Cela's implicit evidence of a stance of strong distance and even irony towards knowledge – this despite affirming the non fictionality of the work in the introduction by calling it “libro de andar y ver” (“book of walking and seeing”), an expression used in Spanish to refer to travel books.³⁸⁴ As most people who implicitly subscribe a pact of factual reading by presenting themselves as travel writers, Cela moves, sees and writes about what he sees but, differently from his colleagues in corpus, he himself raises doubts on the factuality of his own writing in several patterns observed in the book, violating the very definition of the genre and self-destroying the significance of knowledge that can be observed through a systematic, quantitative analysis and certainly up to some point noted by the reader.³⁸⁵

Previously mentioned and defined in the above section dedicated Llamazares, the pattern of the *Alcarria dialogue*, originally created by Cela (as its very designation implies), is observed dozens of times throughout the book³⁸⁶. Rephrasing what has been held about Llamazares,

³⁸² This indicator reaches 143% of the average. As the degree of generality does not match this extreme value (it is located in mid rank, at 89% of the average), extension of knowledge is only third in rank (127% of the average).

³⁸³ Within the authors writing on Spain, density for modern society is 3.8 times the average, leading the rank, while density of traditional society doubles the average, being second within the group. Results are similar in composite terms: first in rank (3.3 times the average) in the case of modern society and second in rank in the case of traditional society (113% of the average). This was noted, albeit with different terms by Henn (2004:230) in the title (*Old Spain and new Spain: The travel narratives of Camilo José Cela*) and when he claims that “one of the principal and constant features of *Nuevo viaje a la Alcarria* is the way in which it bears witness to the new Alcarria and the new Spain”.

³⁸⁴ See footnote 237, on page 127.

³⁸⁵ Ilie (1961:14), quoted in Casas (2004:154), refers to Cela's “anti-intellectualism”, but he grounds it differently on the author's descriptions (or conveying of voices) of “strayed characters, out of conventionality”, an issue also present in *Nuevo viaje* and dealt with in more detail below.

³⁸⁶ An exact quantification is deemed unnecessary because no systematic comparison with the other books of the corpus is to be carried out – nor it would be possible given that the phenomenon is present only in Cela and Llamazares. The fact that the latter is a follower of the former in what comes to the dialogues and the fact that the reading of both books from an external perspective (that is, without an exhaustive analysis) does not produce the impression of a very significant difference in the density of the use of this device, does not make it crucial to perform such exact quantification. It is thus deemed sufficient to consider that the dialogues are significant in what regards the text extension of *Nuevo viaje* and *Trás-os-Montes*.

nothing seems to come out of an Alcarria dialogue that might not have been expected – in the Alcarria or in any other place or culture in the world, even if we were in the realm of fiction; despite this, the author takes an active part in such exchanges (most of the time initiating them himself) as if he were trying to reach something, thus playing with (the quest for) knowledge.³⁸⁷

A second pattern, the specific subtype of the first which could be called the ***incomplete Alcarria dialogue***, is paradoxically characterized by both excess of knowledge (in the sense of irrelevant information, as in the *complete Alcarria dialogue*) and lack of it (in the sense of impossibility or ambiguity faced by the reader in even identifying all participants in the conversation, Cela seeming to be one of them in almost all the cases). This second difficulty resists even a careful analysis, as illustrated in the following sequence, starting with a complete dialogue and presenting then two incomplete ones. It should be noted that each of these dialogues is presented *in full*, with references to literature and historic characters having been added to the original (page 8, my translation from the original).

«As Desdemona [a character in William Shakespeare's play *The Tragedy of Othello, the Moor of Venice*] Otelina [the driver], is a harbour of peacefulness.

- And do you like her? – asked me (...) the ghost of Abbot Giovan Pietro Bellori [Italian painter, antiquarian and biographer of artists of the seventeenth century] who come to me in dreams.

- Yes, sir, I like her a lot, I could swear I like Otelina more than fried bread.

A few lines later, after the narrator mentions submarines, one finds:

- What was the name of Isaac Peral's submarine?³⁸⁸

- I guess it was called “the Peral”, just like that, which is not much ear-catching.

³⁸⁷ As several examples have been provided for Llamazares and they are structurally identical to Cela's Alcarria dialogues, only two examples are provided (my translations from the Spanish original). Finding a lone child playing tennis (page 109), Cela asks “Are you bored?”, and she replies “Yes, Sir.”; in the following paragraph the author starts describing a house, with no further mention to the girl. Not much later (page 110) “a small young maid” asks the traveller an autograph. “What is your name?”, he questions. “Gabriela, a servant of yours”, she replies. Then the narrator tells the reader she has good looks, that her voice trembles and that she is from Jaen [a town in Andalucía hundreds of kilometres away], having been working there for three days. When asked about her age, she replies “Only a few years”, “smiling with an almost accomplice gaze” and in the next paragraph a completely new, unrelated scene begins.

³⁸⁸ Isaac Peral was a Spanish engineer, sailor and designer of the first Spanish submarine (launched in 1888). Source: Wikipedia.

Still in the same page, the writer forgets the subject and informs the reader he will have two minstrels as companions on his journey. Uncertainty about who is talking is then decreased as it seems possible to assume these two persons are, along with Cela, the voices in most of the incomplete dialogues that follow. That does not last much, as the reader soon (:32) becomes aware that, besides the minstrels and the people he finds in his wanderings, the Nobel Prize winner might also be talking with members of a larger *entourage* as he has “a cohort of six or eight cars and a bus”.

Consequently, neither the reader nor the internal analyst know how to (re)approach the following dialogue they have previously read (page 14), again presented in full:

In the hotel room the traveller sits in a chair, stark naked, his worn genitals pending.

- Do you remember Asunción Turmiel Torrubia, the little charcoal seller from Anquela del Ducado, who managed to become an usher in Carretas cinema?

- How wouldn't I? She was so hot!

The blasé attitude towards knowledge is even shown by a local inhabitant who, asked by the author how he and his neighbours relate with summer visitors answers, replies rather ambiguously and even in contradiction (:146): “Fine, fine, they're good people, not much to complain about (...) sometimes they leave without paying but I'm telling you they're good people... some more than others, of course.”

Two specific episodes, though, epitomizes most strongly Cela's approach. On page 111 a journalist asks Cela if his intention is “documentary or purely literary”; faced with the possibility of settling the above-mentioned ambiguity issues, author-character Cela asks back “What do you think?” (“¿Usted qué cree?”, in the Spanish original). In itself ambiguous, the expression imposes another layer of uncertainty by suggesting that the journalist should know the answer, the same implicitly applying to the reader (and the researcher) because it seems they should understand the meaning of “What do you think?”. It is left up to the journalist (and the reader and the researcher, for that matter) to hypothesize that if the intention was documentary the author would have make it clear, as this game of concealment would be proper only in the “literary” realm.

The second episode takes place on page 16. After writing that “the traveller (...) only needs to wait for the arrival of Saint Boniface, bishop of Mainz, converter of Germans, who died in

Friesland, slain by angry non-believers”, Cela is asked “Where do you get such great wisdom?” and answers “There you are” (“**Ya ve**”). It is no surprise, then, that an author-character not willing to reveal the sources of his “great wisdom” even when asked about them at inception, does not mention them throughout the remaining of his *Nuevo viaje*. His answer also fits the fact that, despite being a heavy user of informants³⁸⁹, informants are often hidden in the sense that they are not presented within their social and/or material contexts, amounting to no more than anonymous voices of otherness in around half the cases.³⁹⁰

Why would Cela make such efforts in presenting himself as concealer? Concealment may in fact enhance his epistemological authority, by suggesting he has privileged access /relations relative to his sources – which must, then, be kept secret due to its high value³⁹¹ or because they can not be made available to the non-initiated. The author can even be seen as a highly learned person *tout court*, someone who somehow either does not need sources at all or as has a unique, unmediated and/or almost **mystical access to information** such as that about the bishop of Mainz (the reference to whom seems to have been inserted only to show off knowledge, no connection at all existing with the remaining of the text). This is also seen in his omission of the origins of his quotations of local proverbs, popular sayings and nicknames applied to people of certain villages. Playing the part of a local inhabitant born and brought up in the region, he presents himself as if having no memory of the moments when he come to know those elements of folklore, because his gathering of knowledge in this respect would have been a gradual, organic process. ((<> authenticity))

Cela thus positions himself as a knowing insider above the reader and his fellow writers of the corpus, who mention informants or guidebooks and quote the press and other non-fiction works (often in the realm of History, as seen above).³⁹² A strong *authority* is thus reached in which the narrator is (almost) omniscient by either not needing sources, seemingly creating characters out of the blue as if the were a novelist – something which actually happened with

³⁸⁹ Second in rank both in terms of density (173% of the average) and in composite terms (159.8% of the average).

³⁹⁰ This happens, amongst other cases, with an unspecified informant who tells the story of a local parent who becomes angry with his daughter for having won a local Miss Bikini contest (page 160); with an unknown local figure talking about the “natural” qualities of local wine (161); with an informer who is solely described as “a no longer young woman” (page 211); with a woman who is only described as “knowing of remedies” (211); with a voice describing local agricultural productions (219); and with another unspecified voice (221).

³⁹¹ It should be noted that Cela is writing before the era of internet, which of course allows for free, fast access to enormous amounts of information, such as who was Abbot Giovan Pietro Bellori.

³⁹² This also noted in the application of the articles “el” or “la” when referring to local men or women, a use which denotes strong familiarity in Spanish.

Cela's previous travel writing, as per Henn (2004:112) – or is not willing to share them with outsiders to *his* otherness.³⁹³

At some parts of *Nuevo viaje*, such proximity to sources is even more important than the content conveyed by sources. On page 191, after mentioning the “country scent of a thousand herbs that are not seen but one can guess,” the voice of the author is followed by another that asks:

- Do you mean rosemary, lavender and anise?
- Yes. And peppermint, sandalwood and thyme.
- Could I add mistletoe, melissa and sesame seeds?
- Of course, why not?

On another instance of this pattern (as if a celebrity tired of being chased by *paparazzi* readers, he seems to mean) the author destroys his own authority as bearer and vehicle of (valid) knowledge. After referring to “his first wife” the following dialogue ensues:

- But was not the first wife of the traveller Polish? [– asks an unknown voice.]
- Shut up, Sir, and stick to taking notes of what I tell you.”
- I am sorry. (:28)

Relevance as a criterion for inclusion of something in the text is dismissed when Cela describes a practice involving a cock that is suspended and hit by an individual mounted on a horse.

“They do that in many villages”, says someone. “I know, but now I am passing through this one” (:198).

Another case of distancing to knowledge is outright discredit or opposition to a subject seen as common(place). Flying in a balloon, Cela writes that “the scene is beautiful and prompts one to think about the subject of human smallness, the ephemeral nature of glories and vanities, etc”

³⁹³ As detailed below in this section, Cela reinforces his ownership of the Alcarría by visiting places and markers of his first *Viaje a la Alcarría* (1948).

(:136). Later, a “summer visitor” asks Cela: “Wouldn't you agree that we are on a fast and inevitable pace towards losing our signs of identity?”; the author comments on this by writing: “What the traveller has just heard sounds so progressive, so original the he's almost out of breath” (:196).

In such reaction Cela disdains not only a) (deemed) clichés but also b) authenticity, as materialized in signs of identity, or at least as a general anxiety about change, associated with nostalgia (which, as seen in the literature review, is very close to authenticity); moreover, there are cases in his work in which a traditional past is no better than a modern present³⁹⁴. All this is contradicted, however, by the relevance of his present(ific)ation of the past (19% of the text) and the occasions in which he implicitly and explicitly uses and praises the notion of authenticity³⁹⁵. Specifically, nostalgia and authenticity are conflated in a significant excerpt in which he has no doubts of the value of what has been lost:

The traveller thinks, with no little pain, of all the endearing creatures who lived here and died without finding a narrator who portrayed them: Anselmino, the fool of Cereceda, who imitated like no one the sound of the partridge, who fed on lizards and always wore a poppy in his ear; “uncle” Clarencio, the castrator of Hontanillas, who applied injections cleaning the needle with his handkerchief and a little saliva; Austricliniano, the sexton of Torronteras, who had seven priest sons and five nun daughters; Martin Palomino, the stutterer of Villaescusa, who went to the border with Portugal tuning bells; Pedrito Pensamientos, the celebrity impersonator from Alique, who made success in Madrid and who imitated Rachel and Pastora Império; “uncle” Sixto from Tabladillo, who died without being fooled by no one; and

³⁹⁴ “In [the village of] Casasana one does not see donkeys nor mules, now there are tractors”, which are considered better for the countryside (page 173). Also, due to the nuclear central, “the river [Tagus] runs with very good temperature”, fostering the growth of plankton which feeds fish; this prompts the traveller to muse that “it would be amusing if nuclear power would change positively the ecological balance”. (245).

³⁹⁵ On page 250, Cela finds a “Moorish source (...) topped, – oh, my God! – by a supermarket streetlamp (it is not clear whether he is talking about a lamp bought in a supermarket or a lamp belonging to a supermarket, but the effect is the same). The city of Azuqueca de Henares he describes as: “Big and rich and showing more industry than character” (page 30), industry thus being portrayed as something that cannot be part of character – of essence, and therefore inauthentic. Even more clearly inauthentic are the names of four sisters Cela hears a mother calling (“Vanessa, Deborah, Samanta, Noemi”), upon which he says that “in less troubled and fake times they would be called Carmen, Pilar, Teresita y Juana”. Here, stepping outside the border of likelihood and showing Cela's praise and enactment of language, a person takes the trouble of naming a group of girls one by one, prompting the author to present his own (correct) list, which includes not Teresa but Teresita, the diminutive. This episode very much evokes Mark Twain with friends in France (quoted at the beginning of Leitch, 2009, no pages provided). “I expected to have a guide named Henri de Montmorency, or Armand de la Chartreuse, or something that would sound grand in letters to the villagers at home, but to think of a Frenchman by the name of Billfinger! Oh! This is absurd, you know. This will never do. We can't say Billfinger; it is nauseating. Name him over again; what had we better call him? Alexis du Caulaincourt? 'Alphonse Henri Gustave de Hauteville,' I suggested. 'Call him Ferguson,' said Dan. That was practical, unromantic good sense. Without debate, we expunged Billfinger as Billfinger, and called him Ferguson.”

so on. The traveller thinks there is a **true story of Spain that will never ever be written**. (:144)

The quotation befits in part the words of Casas (2004:154), rendering a commentary by Ilie (1961) on the earlier travel writing of Cela:

The representation of this unusual man - as unusual as the characters he meets on the way – answers to the Celian primitivism and refers to an idealistic and anti-intellectual conception, in which the selection of strayed individuals, outside conventionality, responds to the anti-social attitude of writer who, through his creatures, refuses to submit to established values. (my translation from the Spanish original)

In the same vein, for Champeau (1995:223)³⁹⁶

in Cela's TW, the choice of marginal characters is much related with the celebration of the individual, since far from representing a social category, they are characterized by the refusal to reduce the person to a social being; they are pure individuals enacted by a systematic search for unusual characteristics.³⁹⁷ (my translation from the Spanish original)

It should be noted, though, that the notion of social implied in these two comments and attributed to the Spanish writer is of a nature different from that of social science (defined and discussed in section 3.3): “anti-social” here does not fit the concept of deviance in social science, as these “endearing creatures” do not commit crimes nor do show up as performing important violations of the social norms of the society in which they lived (as argued in detail below)³⁹⁸.

On the other hand, not considered by the comments above, several of the forms of authenticity discussed in the literature review can be seen in the descriptions of these people. First, there is the authenticity of the past, premodern society in which the endearing creatures lived; this is charged with nostalgia, as their traits and behaviours are either extinguished or in

³⁹⁶ Quoted in Casas (2004:154).

³⁹⁷ The dichotomy, of course, echoes the debate agency-structure in sociology, albeit in a rather generic way and using an implicit notion of the social that does not fit well into that of sociology (as detailed below in the main text). Given that Cela himself does not present in his work images of the social world which may be seen in the light of this debate (the same happening with the remaining authors of the corpus) – something which possibly ultimately stems from the sheer theoretical perspective as against the empirical nature of the factual literature on otherness – the debate is not considered in this study.

³⁹⁸ In the case of the sexton, of course, rather than an “anti-social” stance or condition, what one sees is social reproduction (and reproduction *tout court*) at work, as sons and daughters repeat their father's rapport with a religious institution.

the process of extinction (with the exception of the celebrity impersonator and possibly “uncle” Sixto, whose profession is not described). The excerpt amounts, then, to present(ifi)cation of the past, as the sole link between such people and the present in which Cela travels is the sharing of the same physical space.³⁹⁹ It also marks Cela's difference vis-à-vis the other present(ifier)s of the past in his sense of **belatedness** (Behdad, 1995)⁴⁰⁰: the Nobel prize writes as if arrived just on time to hear about those endearing creatures and to be conscious that they make “a true History of Spain which nobody will ever write”, not being able to engage neither in the “salvage” nor in the “rescue” modes of (ethnographic) writing (Clifford (1986) and Clifford and Marcus (1986), as per section 2.6).

A second form of authenticity consists of the affirmation of the self against society – the above-mentioned «celebration of the individual» noted by Champeau, but here, contrary to what Champeau holds, some of them represent a social category by representing a profession. Some characteristics and behaviours of the endearing creatures seem to some extent peculiar even relative to the past itself (albeit self-sufficiency and craftsmanship can be included in the “mainstream” past). Seemingly, they do not violate social norms up to the point of disturbing others, as held above, rather being seen by the contemporary reader (and probably by the “mainstream” individuals of the time in which they lived) as eccentric in somehow obstinate ways that disregard social approval (the need for which could tame the desire for authenticity, as per Goffman, 1959, section 2.3 above). Three of them (the castrator, the bell tuner, and the impersonator) even effect eccentricity through their unusual professions, so that there is no reason to seem them people as not socially integrated (e.g. within a family, a community to which one gets back after travelling, etc).

In fact, the harmless authenticity of the creatures from the point of view of “mainstream” society (either the one contemporary of the endearing creatures or the one contemporary of the reader) would seem to hold even if these people were not (considered) socially integrated. This is because, although some of their behaviours/attitudes might inspire concern (the mental illness of

³⁹⁹ The status of the quotations of local proverbs, popular sayings and nicknames applied to people of certain village proverbs and popular sayings vis-à-vis nostalgia is ambiguous, as it is not clear whether they are currently in use. Of these, the notion of proverb is associated with traditional society because they might indicate shared understandings and principles, pointing to the notion of community by being “wisdom, truth, morals, and traditional views in a metaphorical, fixed and memorisable form and which is handed down from generation to generation” (Mieder, 1982).

⁴⁰⁰ The notion stems out of late nineteenth century attitudes towards the Orient by travellers “who had lost the once authentic experience provided by a world that was disappearing” (page 168).

the fool of Cereceda), disapproval or even repugnance (his feeding on lizards and the process of cleaning the needles), the underlying intention seems to focus on inspiring at most a respectful/comiserate amusement.⁴⁰¹ The peculiarities of these people are not enacted for its own sake nor for exhibition, thus fitting authenticity as opposition to “superficiality, ceremony, formal conversation” (Elias, 2000 (1939), section 2.3) and almost perfectly contrasting with the meaning of inauthenticity found by Lewin and Williams's (2009) (same section) in a punk subcultural scene: play – or, at least, *ironic* play, irony, pastiche, style, and conspicuous display of taste. They are either an end in themselves (using a flower in the ear) or ways of earning a living (this includes the exhibitions in Madrid of the celebrity impersonator) which contrast with those of industrialized/commodified and more affluent society where such kind of craftsmanship/resourcefulness seem no longer necessary or effective. The endearing creatures, then, are also a case of authenticity in their contrast to capitalism and/or commodification (Vannini, 2009a, see literature review).

Despite the distanced attitude towards knowledge Cela shows at some points of his *Viaje* (sometimes intentionally), he is after all seduced by the endearing creatures and ends up by engaging in full nostalgia, as so many traveller writers, tourists and even social scientists (see footnote 100, page 46 for sociologist Pierre Bourdieu's nostalgia). Also, as is the case specifically with a vast number of traveller writers and tourists, his nostalgia is romantic à la Urry (2002(1990)) (as per section 2.6), that is, he seems to wish to be the sole gazer of such past.

This Cela achieves by building himself as a special persona through his concealment of sources (as seen above), a patterns which is present in the very endearing creatures excerpt, where he again uses the article “el” and the word “uncle” (“tio” in the original), almost as if he were a family member or a friend, and not making clear whether he had direct contact with any of them (e.g. in his first trip to the Alcarría, which the title of the account of the second trip so clearly evokes⁴⁰²). In such a way he is part of the fulfilment of the promise of travel, allowing the transcendence of mediation (Noy, 2009:219, see page 76). Albeit reaching “the real thing” through his hand – Cela seems to be saying – the reader should be thankful of the generosity with

⁴⁰¹ This corresponds to a certain informal use of the Portuguese word “castiço”, which almost subverts the formal meaning. Corresponding to Spanish “castizo” (meaning “typical, pure, genuine of any country, region or place “ in *Diccionario de la Lengua Española* of the Real Academia Española, www.rae.es) “castiço” means formally “correct language, free from foreign words or forms”, “pure” and “authentic” (Wiktionary, <http://pt.wiktionary.org>; Dicionário online de português, www.dicio.com.br; and Wordreference, www.wordreference.com).

⁴⁰² In fact, none of characters mentioned in the above quotation are mentioned in *Viaje a la Alcarría*, the same even happening with two of the six places mentioned (Torronteras and Tabladillo).

which the writer shares part of the wisdom he gathered through his privileged, at times mystical, and always unmediated relations with otherness.

If the endearing creatures are lost forever (and possibly because of that), Cela takes much text to register local proverbs, popular sayings and nicknames applied to people of certain villages. Of the latter he even tries to explain the origins, holding that people from a certain village “pay, like so many other (...) the price of the rhymes” suggested by the name of the place (:67)⁴⁰³, noting that the qualities attached in such a way to villagers are not accurate descriptions. He is not clear, though, about whether these elements of folklore are actually in use and, *a fortiori*, does not deal with their potential consequences – that is, the reader does not come to know if they influence (or *used* to influence) attitudes / behaviour or they are (or were) taken lightly as a mere amusing wordplay.

It is only in this sense that Cela takes them, in any case. He seems satisfied to simply note certain uses of Spanish and its effects upon Spanish itself (for that matter, the Spanish language), not so on the reality external to it, in a kind of **celebration of language** which is also at work at the quotation of some local voices and in the writer’s own voice.⁴⁰⁴ In this light, the Alcarría dialogues are demonstrations of language at work, which explains why in the incomplete version Cela does not deem necessary to identify who is talking: who says (and the meaning of what people say) is not so important as the act of saying.

Interestingly, such disregard for meaning is present in a famous, possibly apocryphal story involving a wordplay performed by Cela (and narrated, amongst others, by Astorga, 2008, writing in *ABC* online edition), which does not translate fully into English. In a session of the Spanish Senate (of which he was then a member) the author was asked if he had “fallen into sleep” («¿Está usted dormido?»), having been found in the act. Denying so, he added “I am sleeping” (“Estoy durmiendo”), which prompted the priest Senator who had initiated the dialogue to utter: “Well, that’s the same, right?”. Cela then replied: “It is not the same to have fallen into sleep and to be sleeping, in the same way it is not the same to be fucked up and to be fucking [someone]” (“No es lo mismo estar dormido que estar durmiendo, de la misma manera que no es

⁴⁰³ One of the examples provided is “en Atanzón, en cada casa un ladrón” (“a thief in every house, at [the village of] Atanzón”, page 67).

⁴⁰⁴ Consider the above example of page 146 of *Nuevo viaje*, presented on page 187, in which a man talks about his impression of tourists, stating two contradictory views and ending up in irrelevance. Cela himself writes (page 83) about “a girl who is a friend, well, who has a pre-marriage relationship, as now people say, with a priest who one does not know if he is still a priest.”

lo mismo estar jodido que estar jodiendo”). The writer thus considered that a relevant difference exists between two utterances (which mean the same but are grammatically different) because between other two utterances a difference in grammar is (correctly) associated with a difference in meaning. Although in those two other utterances meaning is relevant, differentiating one word from the other, that is not the case with the first mentioned pair of utterances.⁴⁰⁵

“Don't call me Sir”: an author greater than its subject

In *Nuevo viaje* Cela also performs a detachment from knowledge by centring upon himself. This behaviour is noted in Cela's account of his first trip to the region (*Viaje a la Alcarría*, 1948) by Aznar Pastor (2004:299), who finds in such work

the “literaturization” of a genre [travel literature] that was supposed to be referential, producing a move from the referential the self-referential. With the introduction of the “traveller”, a problematic character in search of himself by means of the journey, the travel book gets closer to the novel. The account is both a history of physical travel and a history of the transformation of the traveller.

Up to a point this description is common to every writer of the corpus, in that they write about their feelings (the exception being Franck Arencibia, given his intention of an “objective” and global view of Spain). They do it, however, always prompted by their experiences within otherness or by other information regarding otherness (e.g. gathered by sources other than observation), while in *Nuevo viaje* the Nobel prize winner (also) centres his text upon himself in a fashion not directly linked to the Alcarría as social world existing by itself, apart and independently of the writer and, contrary to what Aznar Pastor holds above, is definitely not transformed by otherness – instead transforming it.

First, the region has already been in fact transformed by the writer, as he moves through a landscape marked by references to his first trip of the 1940s, revisiting places, meeting or evoking people he has met. Cela even takes note of commemorative plaques of that trip, quoting the corresponding inscription (which invariably refers that the writer has been there) as well as

⁴⁰⁵ In fact, meaning ends up by playing a part. If the pair *jodido-jodiendo* (*fucked up/fucking (someone)*) were replaced by a pair grammatically related in the same way but with a different, non-sexual, non-slanged content (e.g. by *ayudado-ayudando* (*helped / helping (someone)*) the underlying irreverence would disappear and possibly would make the episode unworthy of note.

the phrase or the phrases of *Viaje a la Alcarria* that refer to the place; he therefore makes use of the ultimate case of an on-site marker, “any kind of information or representation that constitutes a sight as a sight: by giving information about it, representing it, making it recognizable” (Culler (1981:132)⁴⁰⁶. On more than one of these instances he mentions the state of conservation of the plaques and on one occasion he even informs the reader of where they were made and the names of the people (possibly artists) who made them (:148). If the tourist looks to things as signs of themselves (Culler again), Cela is here looking for things as sign of himself. Although elsewhere he derides knowledge by means of distance or irony, here he can not be considered a post-tourist (of himself) as he takes seriously the plaques commemorating his former passage through the region, therefore not (explicitly) fitting Urry’s (2002(1990):91) definition of post-tourist as awareness of her/his condition and as knowing that “tourism is a series of games with multiple texts and no single, authentic tourist experience.”

Second, *Nuevo viaje* deals explicitly with the authors’ status as a famous person in his face-to-face interactions with his his entourage (e.g. giving interviews) and the otherness (e.g. signing autographs or producing excitement due to his very own celebrity condition and attached excentricity).⁴⁰⁷ While some authors of the corpus are transformed by otherness (or at least when within otherness)⁴⁰⁸, Cela not only is unmoved by an Alcarria which has been transformed even before his arrival but is also capable of exerting contemporary influence on it. Epitomizing this, on page 78 a hawkker says he and his group follow the writer because when he stops people gather and they manage to make sales.

Even interaction with people he has met decades ago on an equal basis during his first more or less anonymous journey, are disturbed by his gravity pull. On page 173 one can read the following dialogue with a local (my translation):

⁴⁰⁶ Quoted in MacCannell (1999 (1976)).

⁴⁰⁷ “There he goes, there he goes! And the black woman, man, the black woman! [from “San Luis, Missouri, a Stanford University graduated” who drives him]”, page 201).

⁴⁰⁸ As seen in the corresponding sections of this chapter, Evans confesses to have been changed by the physical and psychological challenge of crossing a large part of Spain on bicycle, and in Portugal, to some extent matching the attitude of Cohen’s (2004) existential tourist, sedentary Hewitt questions his own working ethos and former way of life.

- Damn, Felipe, you're still a lad!, says Cela. "Of course not, it's you, Sir, who looks so young, as young as always", counters Felipe, to which Cela replies: "Don't call me Sir, Felipe, you and I (...) have been friends for forty years."⁴⁰⁹

One may ask whether, if friendship were really the case, Felipe would address the writer with such formality.⁴¹⁰ What we see here is Cela using his mediatic weight to define the nature of a social relation – a friendship about which one friend knows better and has more *authority* over. In fact, possibly symbolizing his larger-than-life status, Cela also bears his literal burden over otherness and his own entourage, when (page 204) he is weighted in a traditional balance held by the shoulders of two local *mozancones* (strong young males). The result is "ten large *arrobas*"⁴¹¹, almost the double of the weight of his driver, prompting the comment by one of the *mozancones*: "A little more and you would exhaust us!". Then, in an inversion of the "Don't call me Sir" episode in which otherness deserves a special consideration touching patronage, a "forastero" (outsider) – note that the author does not stick here to "a man" or "a woman", as in so many of his descriptions of local inhabitants – tells Cela: "Why! You would be fit for a rodeo!". The outsider then receives from Cela a punch line (literally translated into English so that the wordplay is conveyed) that a local inhabitant probably would never receive: "Only if you lend me your horns, you big male goat!" ("¡Si me prestas tú los cuernos, cabrón!")⁴¹²

The effects of super-traveller-writer Cela over otherness described thus far are of a short run nature and occur at local level, being mostly associated with face-to-face interaction (as noted above), either between Cela and other people or within other people). One can easily

⁴⁰⁹ In the original: "No me trates de usted, tú y yo somos de la misma quinta más o menos, bueno, quiero decir que por ahí nos vamos de edad..., tú y yo somos amigos desde hace cuarenta años, Felipe." Sir is used in the translation to convey the difference existing in Spanish between "usted" (third-person singular) and "tú" (first-person singular).

⁴¹⁰ It should be noted that before this dialogue, on page 48, after meeting a person who as a child accompanied him for a short time in his first journey through the Alcarria, it is not Cela who makes such request for informality. "Hey, Armando! (...) What have you been doing, I mean, what have you been doing, Sir?", asks him Cela in the third person (in the original Spanish version). Armando then asks Cela to treat him in the first-person (in the original Spanish version). The difference here is that the relation established in the first trip was an adult-child one, not necessarily prompting a friendship (in fact Cela does not mention friendship in the episode).

⁴¹¹ An old Spanish standard for weighting varying according to region and equivalent to 11.5 kg when (rarely) used today.

⁴¹² The wordplay is based on that a *novillada* is a rodeo in which young cows (which feature horns) are used and *cabrón* (literally male goat, also with horns) is derogatory term for a man whose wife has been unfaithful. As in many other languages, *cuernos* (horns) symbolize spouse infidelity.

imagine, though, a second wave of commemorative plaques being set up after this second trip to the Alcarria and the formation of new tourist or postmodern tourist attractions.⁴¹³

Conclusion: the risks of playing with non-fiction

The above-mentioned “What do you think?” episode, in which Cela stresses his ambiguity as regards the (non) fictionality of *Nuevo viaje*, takes place on page 111. It is thus that after having gone through not much far from half of work (total number of pages is 251) the reader finds a contradiction with the title of the book and the introduction, where the author locates his work within the realm of fact (as noted above). S/he now faces the remaining of the work without neither the assurance of the “documentary intention” expected of TW nor full liberty to engage in the suspension of disbelief which would be associated with a “literary” intention, and questions the very status of what he has been reading hitherto.

This issue of factuality has been debated relative to Bruce Chatwin's *The Songlines*. According to Lisle (2006:65), novelists and writers accepted the book as a novel rather than a travelogue, and therefore “Chatwin and his colleagues are released from **the burden of factual representation**”; in contrast, anthropologists and locals claimed that the lack of intellectual rigour in the work failed to satisfy the non-fiction criteria of travel writing. It is true that, disregarding his publisher's advice, Chatwin insisted on calling *The Songlines* a novel⁴¹⁴; the author, however, in writing such non-fiction resorts to the designation “Aboriginal people” – which has had for decades a very specific meaning referring to an actual people – even if its defining boundaries may be up to a point debatable and loose, as noted by Clifford (1988) about all cultures. If the use of commercial brands is legally restricted over free speech, then the “brand” Aboriginal should deserve a similar deference, and people who use it should not be released from the burden of factual representation, being then accountable on the grounds of its accuracy.⁴¹⁵

⁴¹³ The subtle difference between the post-tourist (no adherence to markers) and the postmodern tourist (interest in markers as markers) should be kept in mind (as per literature review).

⁴¹⁴ Lisle (2006:61), quoting Shakespeare (2000:486) and Blanton (2002:95-105).

⁴¹⁵ This critique could be extended to include the historical novel. In this case, the radicalized version of the argument would sustain that the existing limits or outright prohibitions to the fictionalization of living persons (and why not living peoples, as the Aboriginal?), apply or should apply to dead persons. This in turn could be extended applying the principle of the right to reputation a person has regarding her/his name to a “**right to reputation**” that historical events or processes would have regarding their designations (say, “storming of the Bastille”, “French

By intentionally blurring the delimitations between the factual and the fictional (“What do you think?”), Cela places himself in *Nuevo viaje* in an even more contentious position. One might question him as anthropologist Catherine Berndt (1988:130-2)⁴¹⁶ did of *The Songlines*:

The book itself is (...) a mixture of half-truths and fabrications. (...) Where does fiction begin, or end, and how is the mixture to be interpreted? (:64)

Given TW and FLO's potential to produce effects via their status as sincere representations (as discussed in detail in chapter 1 and in the first section of this chapter), an author should up to some point be responsible for avoiding that her/his work is taken as factual when it is intended to be fictional and (at least) for avoiding ambiguity in this regard. Such kind of disregard for convention may be criticized as other types of disregard for convention – such as using ambulances to transport guns in war scenes – risking destroying the benefits of convention in communication.

Thus, along with his nostalgia for the “endearing creatures”, Cela reveals himself as the most postmodern author of the corpus by engaging in de-differentiation⁴¹⁷ between (in his case) knowledge and fiction, and by playing with the distinction⁴¹⁸. His postmodernism is also grounded on his opposition to grand narratives or even narratives *tout court*, as shown by **truncated descriptions** (the endearing creatures and others the like) and **truncated conversations** (the Alcarría dialogues). At the same time, the analysis of his text reveals (concrete) limits and issues which possibly are not seen in the theoretical discussions of the (deemed) postmodern condition and position.⁴¹⁹

Revolution” or even the year “1789”). Thus, the writing of texts assumed as fiction based on such designations would be unacceptable. This is not to argue, of course, that science or history are always correct and exhaustive forms of knowledge, but that they are different from fiction in that they entail processes in which the knowledge they produced is subject to empirical testing and peer review; nor this amounts to ignoring the problematic status of ethnography as representation of cultures (Clifford, 1988). In fact, the very critical views on the work of anthropologists and other institutionalized producers of representations show that representations can be discussed taking as reference the notion of an existing, non fictional social reality (albeit fluid and prone to different interpretations). Such perspective is very different from using the (legitimate) “anything goes” of fiction (illegitimately grounded or mixed) with the prestige non-fiction has with the reader due to the truth-effect.

⁴¹⁶ Quoted in Lisle (2006:64).

⁴¹⁷ A notion seen in general as defining of postmodernism, according to Urry (2002(1990), as per literature review.

⁴¹⁸ Cela cannot, however, be considered a postmodern tourist (of himself) in the sense proposed by Ritzer and Liska (1997) as he takes seriously the on-site markers of places that have become attractions because he has visited them during his first journey through the Alcarría.

⁴¹⁹ In fact, postmodernism may not be a recent phenomenon in the history of literature. As one can read in the introduction to Schaber (1993:1) the contributors “have rediscovered an age of postmodernity in the past”. Miranda

France argues in favour of this when commenting on Cervantes's *Don Quixote*, the seventeenth century novel which is in great part the subject her *Delusions*. According to her, at the beginning of Part Two "Don Quixote and Sancho discover that a book - that is, Cervantes' Part One - has been published about their exploits and that they have been made famous. From now on, the characters they meet will recognise them as literary heroes. People will marvel at the fact that they are not fictions, but real, flesh and blood. Don Quixote and Sancho will often find themselves drawing attention to their true existence, as opposed to other literary representations. In a post-modern twist, they will refuse to be taken for mere fictional characters."

Chapter 5 – General analysis and interpretations

5.1 – The representations of the Iberian neighbours⁴²⁰

On the whole, the subcorpus writing on Portugal presents the country as suffering from insufficiencies in material terms, a result which obtains both in absolute terms⁴²¹ (external analysis) and in terms of density of extension⁴²² (internal analysis).⁴²³ Such similarity between what the reader finds and what the researcher extracts through a more systematic analysis is also found in a clear picture of pre-modernity (again both in terms of the external perspective and internal perspective⁴²⁴) and in the significance of the theme *disregard for law, rules and institutions*⁴²⁵. This theme is even more important for Spain⁴²⁶, so that the portrait of Iberia drawn by the corpus accommodates the patronage system found in Southern Europe by Sapelli (1995) and García and Karakatsanis (2006)⁴²⁷ (in as much as law, rules and institutions are taken here as applying universally to all individuals).

⁴²⁰ Unless otherwise advised, the results of this section derive from the analysis of themes (see section 3.10). The overall portraits of Portugal and Spain here mentioned are based on a simplified analysis focusing on the top 30% more significant themes, corresponding to 70% of significance, that is, 70% of the total number of images of the social world (details on section B.7, below). (More precisely, as explained in detail in such section, 30% and 70% are approximations, the actual values showing small variations of no more than 5 percentage points relative to those values (e.g. 31% and 69%)).

⁴²¹ See the explanation for this conclusion on page 301, section B.7, Annex B, and table B.24 on page 310 on the same section, which summarizes results vis-à-vis Spain and compares internal with external results.

⁴²² Explanation on page 307, section B.7, summary again on table B.24, page 310.

⁴²³ From the perspective of the reader (external analysis), the absolute number is the relevant indicator when considering the representations conveyed by books, assuming the reader is not sensible to density of images/themes but to their sheer quantity. (See subsection “Further remarks on themes” of section 3.10 for a detailed argument on this.) It should be noted, however, that building a meta-portrait based on all the images of the social world of the corpus is by definition excluded from the capacities of the reader, so that results in terms of external analysis are merely theoretical, having no possible empirical interpretation. Such interpretation would entail assuming a super-reader dealing with the entire corpus, an operation which is actually performed by the researcher in the internal analysis (in terms of density of extension).

⁴²⁴ See page 303, section B.7, Annex B for explanation this conclusion as regards the external analysis; page 307 on the same section as regards internal analysis; and table B.24 for summary on page 310 on the same section.

⁴²⁵ As regards the external analysis, see table B.20 on page 301. There one can see that the theme ranks sixth within the 18 themes which comprise the top 30% top themes in terms absolute number of images of the social world (these 30% top themes accounting for approximately 70% of the images of the social world). The table also shows that the theme accounts for 6.1% of the images of the social world of the top 30% themes. As regards the internal analysis, the theme ranks tenth with a share of 5% (see table B.22 on page 306).

⁴²⁶ See table B.21 on page 303, for the external analysis, in which the theme ranks second amongst top 30% themes for Spain, with a 9.1% share. In terms of the internal analysis (table B.23 on page 308), the corresponding figures are 3rd and 6.1%.

⁴²⁷ The references to social science literature on South of Europe, Iberia and Portugal are based on section 1.6, where further details are provided, including page numbers.

The thematic analysis presents Spain also as a somewhat disadvantaged country in material terms⁴²⁸, albeit quite less than Portugal, and represent it as more modern, but still premodern⁴²⁹. The fact that for Spain the theme *conflict / violence / aggressiveness / rudeness / absence of integration* is very significant⁴³⁰, jointly with and the slightly higher relevance in Spain of *disregard for law, rules, institutions*⁴³¹, depict Spain as a country in need of social cohesion and more so than Portugal, for which the picture is mixed⁴³².

The question remains open whether social cohesion could be measured by some “personality” traits associated with the inharmonious social relations and dissatisfaction the authors see in (the) people of the country, which would further distinguish the Iberian neighbours: Spain would show as even less integrated⁴³³, while for Portugal none of those themes is relevant⁴³⁴, this latter fact including the irrelevance of the theme *anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium*, at odds with the cliché of sadness and sense of tragedy often associated with the musical form fado as essence of Portugueseness⁴³⁵. There may be consistency, though, with the (social science) concept of welfare society (*sociedade-providência*), a set of relations of community, knowledge interchange and mutual help Sousa Santos (1993) finds in Portugal, partially filling what he sees as the deficit of the

⁴²⁸ External perspective: explanation for the conclusion on page 304, section B.7, Annex B. Internal perspective: see table B.23 on page 309 (same section) and explanation in the subsequent page. Table B.24 (page 310, same section again) summarizes both perspectives and both countries.

⁴²⁹ See explanation for the external perspective on page 304, on section B.7, Annex B, and same section, table B.24 on page 310 for the external perspective and a summary of both perspectives.

⁴³⁰ External analysis (see table B.19, section B.7, page 298): the theme is 4th for all images of the social world, with a share of 5.0%; while the theme *harmony / integration / tolerance / (absence and/or resolution of conflicts)* ranks 35, with a share of 0.8%. Internal analysis (see table B.23, section B.7, page 308): *conflict / violence / aggressiveness / rudeness / absence of integration* ranks 4th with a share of 5.1% of the top 30%; the theme *harmony...* does not show up within the top 30.

⁴³¹ External analysis: 6.4% of the images of the social world on Spain against 4.3% for Portugal. Internal analysis: 6.1% of the top 30% themes on Spain against 5.0% for Portugal. Tables as mentioned in the above footnotes.

⁴³² External analysis: on table B.19 (section B.7, page 298) rank and shares are 6th, 4.3% for *disregard for law, rules, institutions*; and 25th, 1.1% for *harmony / integration / tolerance / (absence and/or resolution of conflicts)*. In the internal analysis: only *disregard for law, rules, institutions* is within the top 30% (9th: 5.0%). The absence of the theme *conflict / violence / aggressiveness / rudeness / absence of integration* from the top 30% (in both the internal and the external perspective) is consistent with the high degree of social cohesion of the Portuguese society found by Sousa Santos (1993), as detailed in 1.6.

⁴³³ As regards Spain, the themes a) *intolerance / intransigence / prejudice / discrimination*; b) *excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude* and c) *anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium* have some relevance. They total near 7.3% in Spain's total themes (external analysis) and 8% of top 30% (internal analysis). See corresponding tables as mentioned in previous footnotes.

⁴³⁴ They are not part of the top 30% for Portugal both in the external and the internal perspectives.

⁴³⁵ Richard Hewitt even writes that with the end of the twentieth century authoritarian regime (in 1974), “the Portuguese emerged as sympathetic and exuberant as ever.” (page 12).

Welfare State. The possible opposition to the view of integration based on the fact that in the country civil society is weak is mitigated by the important role of the State in transforming heterogeneous Portugal (in economic, social, cultural and political terms) into a society with a high degree of social cohesion.

The analysis also produced meta-portraits of the portraits conveyed by the corpus by means of a focused analysis that excluded the works dealing with specific regions. This meant ignoring Hewitt's *Uma casa* (dealing mostly small rural community) and Llamazares' *Trás-os-Montes* (dealing mostly with a rural region), on Portugal; in case of Spain, it entailed ignoring Stewart's *Lemons* and Cela's *Nuevo viaje* (both dealing with rural regions)⁴³⁶. From such operations it was concluded that for Portugal there is no basic difference between the extended (all works) and the focused analysis in what regards material situation (in terms of density of extension, that is from an internal perspective⁴³⁷) while Spain sees a downgrade in its image of insufficiency, implying that the difference between both countries is slightly reduced, but continues to be significant⁴³⁸. The absence of change for Portugal and mostly the worsening of Spain's material situation strongly clash with what would be expected from the narrowing of the corpus into a subset that deals mostly (or at least more) with urban areas, where economic activity is usually more intense and incomes higher.

The contradiction is compounded by the even most unexpected result that Portugal shows up in the focused analysis as more pre-modern, while Spain reduces significantly its intensity in this regard and is depicted in the focused analysis as an almost neutral country within the duality.⁴³⁹ The result on Portugal could be partially explained by the possibility that some of the authors excluded in the focused analysis make references to modernity which are not based in their experience – this was seen in fact in Hewitt, who clearly transcended in his text the social space of his experience (as argued in the section above dedicated to him). Another possibility is exemplified by Llamazares, who notes modernity within agriculture in the use of agricultural tractors (24% of his images of modernity).

⁴³⁶ Details and justifications for this can be found in section B.8, Annex B.

⁴³⁷ Only the internal internal perspective is considered, given that, similarly to what was argued above, the very operation of narrowing the focus and building a meta-portrait is by definition excluded from the capacities of the reader. This applies henceforth were appropriate.

⁴³⁸ See Table B.28 on section B.8, Annex B, page 317.

⁴³⁹ Table B.29 on section B.8, Annex B, page 318.

Nonetheless, some perplexity remains. Would such results question the overall existence in the corpus of the pact of factual reading, widely accepted as a crucial element in the production and the reception of TW and more generally FLO (as per section 1.5), and which is a major working assumption of this study? The answer is negative with qualifications and exceptions. The first thing to note in this regard is that, in addition to the consistencies in this regard already noted above, there is a general similarity – on average – between the portraits produced by these authors and those produced by social science⁴⁴⁰. Despite underlying moves towards modernity, academic research holds that traditional cultural, political and institutional influences persist in Southern Europe, with the area being characterized by late industrialization and late introduction of market economy when comparing with Northern Europe and the Iberian neighbours are seen as semi-peripheral societies.

In the case of Portugal there was in last decades of the twentieth century a clear, fast economic and social modernization. However, insufficiencies and mismatches persist: some sectors and institutions have reached modernity and other are located in inferior levels of development, with the country showing both traces of First World and Third World. Overall, such duality is partially matched in the corpus by the (weak) presence of a few themes related to modernity within the top 30% themes for Portugal.⁴⁴¹

There is also the view from social science that Portugal performs peripheral functions relative to the production and consumption patterns of core European countries, as shown by the hypertrophy of tourism and emigration (the latter being indeed relevant in the corpus⁴⁴²). Further, in Portugal a significant part of individuals and families of rural extraction who changed their main activity to the industry or the services maintain small, family-run agricultural undertakings, with more than one third of the families connected to the primary sector. This is matched by the high visibility of agriculture in the works of the corpus dedicated to the country⁴⁴³ and

⁴⁴⁰ These latter results are detailed in subsection 1.6, which provides bibliographical references.

⁴⁴¹ In the external analysis (absolute numbers) we have *industrialized production / mass market* (13th in rank, share of 3.4% in top 30%) and *modern technology* (18th, share of 3.4%). In internal terms (density of extension), the most relevant indicator in this context, we have *modern technology* (15th, 3.4% share) and *material competence / capacity* (18th, 2.5% share).

⁴⁴² The theme *emigration* is within the 12 most important themes in the top 30% for Portugal both in the external and the internal approaches, with shares over 4%, as per the usual tables.

⁴⁴³ The themes (*non specified*) *agriculture* and *non mechanized / subsistence agriculture* are the most important for Portugal, both in the external analysis (together, they account for 14.9% of the images of the social world) and in the internal analysis (total of 17.5% of top 30% themes in terms of density of extension).

immediately evokes a construction worker hired by migrant Hewitt who promised to start working in three days because “the [planting of the] potatoes couldn’t wait” (:8).

On another dimension, social science sees Portugal suffering from serious insufficiencies in the education system, noting that in the 1990's the illiteracy rate was still not residual as in most of Europe, while the development of the middle class and the improvement in consumption patterns did not have a positive influence in reading habits in Portugal. Arguably, these visions are reflected in the fact that the corpus ascribes importance to the themes related to absence of rationality and material competence / capacity.⁴⁴⁴

Some ground exist, then, to take the meta-image of Iberia produced by the corpus as a mostly sincere account of the experiences of the authors in Portugal and Spain, which may have been inspired, influenced and/or supplemented by indirect information in the form of social science literature – but caveats must be added. First, such meta-images of Iberia – interestingly, *both* that of the corpus and that of the social science literature mentioned before – are countered by the fact that at least since 1980 Portugal and Spain have been in the top quartile (meaning “very high human development”) of the UN’s Human Development Index, which includes the majority of the countries of the world⁴⁴⁵. Although a fundamental difference between this statistic and the two meta-images does not obtain, because (at least in the social science meta-image) Portugal is contextualized mostly within Europe while the statistic regards the whole world, it seems difficult to found consistency between “very high human development” and the incomplete modernity and the insufficiencies noted.

Moreover, there are also the important exceptions of authors Richard Hewitt, Franck Arencibia and Camilo Jose Cela. Hewitt (section 4.2) clearly violates the pact of factual reading of TW/FLO because in some cases the sources of knowledge he uses do not seem capable of producing the type of images he presents; further, there is the impression that, from the position of a native of Portugal, some of his descriptions although not impossible, seem rather unlikely. In turn, Franck Arencibia (section 4.9) has been shown to be prejudiced against Spain in his rhetorical mechanisms, which may suggest that he was also prejudiced in the *selection* of experiences and images of the social included in the book (as there are no necessary grounds in

⁴⁴⁴ The theme *absence or low level of rationality / reflection / precision and presence of superstition* is amongst the ten most important themes both in terms the internal and the external perspectives, while the theme *material incompetence / incapacity* is even more relevant (as per usual tables on section B.7, Annex B).

⁴⁴⁵ Results retrieved from <http://hdr.undp.org/en/data/explorer>, December 12th, 2011.

his text to hold that images themselves are non-sincere). Finally, Camilo Jose Cela, as seen in 4.10, explicitly assumes a stance of distance and even irony towards knowledge about the social world (and even knowledge in general) and vis-à-vis the status of his work in terms of factuality, so that the factuality of his images of the social world may be doubtful.

Irrespective of the sincerity and accuracy of the depictions of Iberia performed by these three exceptions and the corpus in general, such depictions are of course relevant in themselves. Given the wider audience FLO has relative to social science discourse and considering Thomas theorem that “If men define situations as real, they are real in their consequences” (Thomas and Thomas, 1928:572) such images of the social world may play a part in attitudes and behaviours of readers and the people to whom may forward those images (as argued at length in section 1.4), including the construction of imagined communities (Anderson, 1983) and holiday decision-making (also section 1.4). This latter dimension is especially important for a country (Portugal) showing a hypertrophy of tourism (Sousa Santos, 1993), an economic activity which is also extremely important in Spain⁴⁴⁶, while the general image of a country is also relevant for business in general (Olins, 1999, Van Ham, 2001)⁴⁴⁷ and even diplomacy (Quelch and Jocz, 2005)⁴⁴⁸. Moreover, in a reflexive society (Giddens, 1990) such images are as well likely to engage in the dialogues which constitute society itself.

This makes the more relevant the negativeness found in the images of the social world of Iberia conveyed by the corpus (which almost by definition are not comparable to ideally value-free social science findings).⁴⁴⁹ Here, contrary to what happens in terms of material sufficiency (Portugal is shown as more disadvantaged) and modernity (Portugal is shown as more premodern), Spain’s portrait is much bleaker⁴⁵⁰. Such difference is, however, much dependent on a single author: excluding Franck Arencibia (as seen above, an author prejudiced in his rhetorical mechanisms, a trait which could be deemed as associated with prejudice in image selection) one finds Spain as considerably less negative than its Iberian neighbour⁴⁵¹. On the other hand,

⁴⁴⁶ See http://en.wikipedia.org/wiki/Economy_of_Spain, section on tourism.

⁴⁴⁷ Both quoted in Clancy (2008).

⁴⁴⁸ Quoted in Clancy (2008).

⁴⁴⁹ As regards negativeness, it should be noted here that the corresponding index suffers from the methodological limitation of not considering the intensity of images/themes (as detailed in the methodology chapter).

⁴⁵⁰ 40% more than its Iberian neighbour in absolute figures (external perspective), as per table B.33, section B.9, Annex B, page 322; and almost the double in terms of density of extension (internal perspective), as per table B.34, same section, page 323.

⁴⁵¹ 60% of the value for Portugal in the external analysis and 39% in the internal analysis. See the just mentioned tables.

ignoring the works focusing on mostly rural regions, Portugal clearly stands out as the country with the most negative view⁴⁵², implying that the Spanish social worlds of the Alpujarras (Stewart) and the Alcarría (Cela) show up considerably negative relative to the Portuguese social worlds of Eugaria (Hewitt) and Trás-os-Montes (Llamazares).

5.2 – Circumstances of contact with otherness, types of visitors and possibilities of causation

The typology tourist-traveller-migrant established in this study (see section 4.2) distinguishes a group of sedentary, migrant authors (Richard Hewitt, Chris Stewart and Franck Arencibia) and a group of nomad authors, made up of travellers (Paul Hyland, Datus Proper, Miranda France and the atypical Camilo Jose Cela, traveller-tourist-of-himself) and tourists (Julio Llamazares and Polly Evans)⁴⁵³. This categorization confirms the importance of labelling as “factual literature on otherness” a type of books usually incorrectly subsumed under “travel writing”, as it complexifies what is usually called the “travel writer” (which fact should in fact be called the factual writer on otherness), subdividing it in tourist writer and the traveller writer proper. The typology also shows (with possible applications beyond the realm of writing into tourists and travellers proper) that what is usually seen as a scale ranging from the “superficiality” of the tourist (writer) to the “depth” of the traveller (writer) in their relations to otherness is an incomplete picture that must be complemented by considering the migrant (writer).

This figure, in turn, should not be romanticized as the one who really “goes native” and therefore has a privileged access to otherness. It is reasonable to expect that the circumstances of contact with otherness place the migrant (writer) in a position potentially superior in epistemological terms, as her/his longer contact with otherness established on a more equal standing – specifically, by participating in the same (job) market as locals to earn a living – allows for the establishment of more intense social relations. However, that very same immersion

⁴⁵² Both in external and internal terms, see Table B.35, section B.9, page 323.

⁴⁵³ To this it should be added the caveat that, as discussed in the methodology chapter, such classification depends on the assumption that the information contained in the corpus is true/sincere, which in turn depends on the pact of factual reading of the genres TW (Champeau, 2004:30) and, more generally, FLO. It is important to note this because, while for the purposes of the studying the effects of the reading (external analysis) one can assume that only perceptions matter, the assumption becomes more problematic when performing an internal analysis aiming at relate such intended *actual, real* typology with other *actual, real* attributes of the corpus. The likelihood of the assumption has been discussed in the previous section.

and the necessity to survive may reduce the disposition of the migrant (mostly if s/he is not a writer) in trying to know the otherness (e.g. lack of time to do so).

The balance between this two opposing tendencies seems, then, to be an empirical matter. In the corpus at hand the typology tourist-traveller-migrant shows a correlation with epistemological premeditation in which only traveller writers visibly search for knowledge⁴⁵⁴. This matches (and could be an underlying cause of) the fact that travellers tend to assess more than tourists (fitting the expectation that the latter are more passive relative to otherness) and more than migrants⁴⁵⁵; further, travellers tend to mediate more than tourists and migrants⁴⁵⁶. Given the almost perfect correlation observed in the corpus between the form *mediation* and the use of *informants* as source of knowledge⁴⁵⁷, an expected similar pattern is found as regards informants⁴⁵⁸. The corpus also does not fit perfectly a hierarchy migrant-traveller-tourist as two migrants (Stewart and Hewitt) are located at the bottom of what would be a rank of epistemological depth of the corpus, only surpassing tourist Evans in that⁴⁵⁹. Nonetheless, the expected superiority of travellers relative to tourists is observed in this regard⁴⁶⁰, and migrants

⁴⁵⁴ Table 4.4, page 155 above. Camilo Jose Cela may be seen an exception to such pattern as he shows no epistemological premeditation, but this needs qualifying as he himself is an exception to the typology tourist-traveller-migrant in that he is both a traveller and a tourist of himself (that is, of a former journey he made). Moreover, the absence of such premeditation must be seen in the light of Cela's overt playing with (the notion of) knowledge identified and discussed in the last section of the previous chapter. On Cela's quasi-mystical relation with knowledge, it as if knowledge has been with him forever, or that reaches to him rather than he reaching for it.

⁴⁵⁵ This results holds both in terms of density (the average use of assessment for travellers is greater) and in composite terms (*idem*), as per tables B.5 to B.7, starting on page 279, section B.4, Annex B. Migrant Arencibia, the heaviest user of assessment on the corpus, is excluded from these calculations on the grounds of his manifest prejudice (see section 4.9), which is considered as the underlying cause of most of his assessments.

⁴⁵⁶ Again tables B.5 to B.7, starting on page 279, section B.4, Annex B).

⁴⁵⁷ Section B.12, on page 342, Annex B.

⁴⁵⁸ Tables B.11 (density), table B.13 (within-work share) and table B.15 (composite index), starting on page 289, section B.6, Annex B. In section 4.10 it was argued that Camilo Jose Cela conceals sources. This however, does not mean he conceals all his sources, so that the result is not incompatible with its high use of some of them, namely informants. Moreover, in some cases, the concealment amounts to the omission of information about such sources; it does not mean that the internal analysis is not able to ascribe to many of its images of the social world the corresponding source.

⁴⁵⁹ This result holds both when a) not considering generality (in this case the indicator is density of images) and b) considering generality (the indicator is density of extension of images). For numerical results, see table B.1, page 274, section B.1, Annex B and table B.3, page 277, section B.3.

⁴⁶⁰ As per results detailed on the tables mentioned on previous footnote, in terms of density of images, two travellers lead the rank, followed by a tourist, with the other tourist being last in rank; other travellers are in mid rank. In terms of density of extension, three travellers are amongst the four first positions in rank, with tourists occupying mid rank and the last position in rank. Travellers score 118% of average against 59% for tourists in terms of density of images, with migrant reaching 103%. In terms of density of extension the results are 126% (travellers), 93% (migrants) and 60% (tourists). (The consideration of averages here should be seen just as a complement of the analysis of rank order, as the fact that one group has, say, a higher value in that regard, may be due to an extremely high value of one author, along with low values of other authors in the group. Dispersion is indeed high for tourists, for example, as the above description of rank shows.)

are the only group not affected by the present(ific)ation of the past (details on section 5.4 below), as it be considered likely given their focus on the present otherness (namely, in earning a living within it).

As regards gender, one also finds a mismatch between some empirical indicators in the corpus and specificities that certain theoretical positions would expect from writing by women (such specificities supposedly arising out of intrinsic gender differences or from the effects of gender in social relations with otherness, as discussed in the sections of chapter 4 dedicated to the women writers of the corpus). First, the fact that these authors show high degrees of generality⁴⁶¹ opposes the (would be) expectation of a feminine writing as a tendency to more emotional views, because the higher the degree of generality of an image of the social world, the lowest the possibility of conveying emotion about the object of the image⁴⁶². Given the very high correlation coefficient between generality and use of explanation⁴⁶³, the women writers of the corpus also rank high in terms of this form of knowledge⁴⁶⁴. Second, no clear correlation can be seen between gender and epistemological empathy: although France scores high in this regard, she cannot be said to be much sympathetic towards otherness as she shows the second highest negativeness index in the corpus; at the same time, in Evans one observes the opposite mix of not very high epistemological empathy and very low negativeness).⁴⁶⁵

The only signs of a would-be feminine in women writers (as detailed in section 4.8) are references (and actual descriptions) of relations with the opposite sex, including marriage, along with physical and psychological frailty; this contrasts with male authors, who limit themselves to occasionally comment on attributes of women (never participating in a scene where gender is relevant). It is thus that, with the exceptions noted above, the writings of Polly Evans and Miranda France do not show up as specifically correlated with expectations on women's travel

⁴⁶¹ They are both above the average, being second and third in rank. Table B.2, page 276, section B.2, Annex B.

⁴⁶² Single individuals – who more easily embody emotions than, say, a whole people or a country – are attached by definition a low level of generality, according to the definitions established for this study.

⁴⁶³ See section on correlations in Annex B.

⁴⁶⁴ Third in terms of density; first and third in within-work share of forms; second and third in composite terms (see section B.4, Annex B.) It should be noted here that the contrast, in terms of generality, between explanation (which is usually more general) and understanding (which usually associated with the individual) is not much relevant here, as understanding is quantitatively almost insignificant in the corpus, as argued above.

⁴⁶⁵ Quantitative results on epistemological empathy (figures 1 and 2 on section B.5) and negativeness (section B.9) can be seen on Annex B. Albeit the index of negativeness depends on the actual social worlds experienced by the writer – as they are supposed, according to the pact of factual reading of FLO, to be rendered sincerely – even within such restrictions a sympathetic author would exert, it is assumed, its powers of selecting images so that the global portrait would not be one of the most negative in a set of authors dealing with those social worlds, as is the case with France.

writing – in some cases even directly contradicting such expectations – found by previous studies (which hold that the subgenre is more empathetic and oriented towards others and, therefore, more prone to present people as individuals, as well as more concerned with people than place⁴⁶⁶). ((this should be above, see not on individual and fuse))

On another dimension, the axis affirmation of difference/similarity about otherness shows a relation with the exogenous variable literary prestige / experience / degree of professionalization. Albeit many authors in the corpus present both cases of similarity and cases of difference in their works, they do not engage in contradiction as similarity and difference are affirmed of different aspects of otherness. The exception is Franck Arencibia, the sole self-published author of the corpus, who presents both traces of humanism and traces of cultural relativism⁴⁶⁷. This contradiction in principles and its absence elsewhere in the corpus suggests that the filter of the publishing industry might play a relevant role in selecting works (and possibly correcting them) through a kind of internal reading or at least an experienced, attentive one, so that such kind of contradictions do not reach the external reader.

The results regarding difference/similarity and humanism/cultural relativism confirm the theoretical expectation that no necessary homology exists between elements of one pair and element of the other. Of the eight authors who affirm similarity, five do not present traces of humanism; of the five authors who affirm difference, two do not present traces of cultural relativism. Also, if epistemological empathy can up to a point be considered a measure of a positive attitude towards otherness (as discussed above in this study), we do not observe that any of the four positions similarity, difference, humanism and cultural relativism hold such (supposed) moral high ground, because none is associated with high levels of epistemological empathy⁴⁶⁸. Likewise, none of such positions is clearly correlated with the condition of tourist, travellers or migrant writer.⁴⁶⁹

⁴⁶⁶ See subsection "The choice within Portugal and Spain" in section 1.6.

⁴⁶⁷ Section B.11, Annex B, contains a full description and discussion of cases within this context.

⁴⁶⁸ As per figures 1 and 2 on section B.5, Annex B, Llamazares, Hyland and Proper, the three authors who affirm "pure" similarity (that is, those who do not affirm also its contrary, difference) are located respectively in low, mid and mid rank. Those who affirm solely humanism (and not his contrary, cultural relativism) are located in respectively in mid, low and mid rank (they are Hyland, Stewart and Evans). All other author authors present positions comprising more than one element of a pair. It should also be noted that, as argued theoretically in section 3.7, there is a difference between epistemological empathy and sympathy. In practice Julio Llamazares, the least empathetic author in its epistemological relation with otherness, shows in some excerpts of his writing (section 4.4) a positive predisposition towards the people he gets in touch with and at the same time only notes similarity, not difference.

⁴⁶⁹ The authors mentioned in the previous footnote there authors belonging to all of these groups.

In summary, this section considered the possible influence of exogenous variables (that is, those external to the texts of the corpus) on internal variables (those observed in texts). In this regard, the condition of tourist, traveller or migrant writer does not show an extremely clear correlation with epistemological depth, but the theoretical expectation of the superiority of travellers relative to tourists is confirmed empirically. Further, only traveller writers show a clear epistemological premeditation (they visibly search for knowledge), an observation that goes on a par with the observations that the group tend to assess, mediate and use informants more than tourists. The degree of literary prestige/experience/professionalization also shows a correlation with the axis humanism / cultural relativism in that Franck Arencibia, the only self-published author of the corpus, stands out from his colleagues by assuming positions in both of the elements of the pair, thus engaging in contradiction (his is also, as seen section 4.9, by far the most negative view of the corpus). The possible influence of gender is less clear: it is not present in structural patterns – no quantified variable found a clear correlation with the status of writers as men or women – but it can be seen at work in some specific excerpts of the writers in the latter group.

5.3 – Varied constructions of the other and the search for authenticity in practice

The correlations between exogenous variables and endogenous variables noted in the previous section do not account for all the observations made of the corpus and, as seen, are in some cases rather imperfect. Besides the obvious possibility that the circumstances of contact with otherness, the internal patterns or both are up to a point fictionalized by the writers being studied (some of whom have been considered insincere, as per previous chapter), there is considerable room, then, to look for other suggestions of causality⁴⁷⁰, such as the cultural background of authors.

Such factor can be seen at work in the significant differences found in the corpus between Spanish writers (Llamazares dealing with Portugal, Cela with a region of his own country) and Anglo-Saxon writers (who split between British and American (USA) authors, all dealing with a

⁴⁷⁰ The autonomy of writer's agency power is an important explanatory sociological "residue" to consider, of course. It may be specially relevant if, as it is the case with the corpus studied, the actors being considered originate from a Western society marked by reflexivity and are expected to be more autonomous than the majority of other individuals in such society, pursuing up to some point the non-fiction equivalent of art for art's sake (as seen on literature review). Even Bourdieu (1979 and 1980), one of the most structuralistic observers of literature, holds that in such field there is a struggle between such type of motivation and the heteronym hierarchization principle (favourable to those with power in the cultural, economic and political fields).

foreign otherness). The latter show a negativeness clearly higher than that of the Spanish⁴⁷¹ and they note with much higher intensity absence of rationality in liquid terms (that is, considering also cases of rationality)⁴⁷². Could it be, then, that, as seen on literature review, “the deviant, the internal Other of Europe, is [still] a Southerner”, a view that Dainotto (2007:54) finds in orientalist discourse of eighteenth and nineteenth centuries, replacing the Orient of Said’s (1978) view with South of Europe?

In answering this the pair traditional/modern may be especially useful because it is midway between content variables (which the author more easily controls as they are more visible) and structural variables (which only come out through the systematic, internal analysis)⁴⁷³. Here, Anglo-Saxons show a tendency to see the Iberian Peninsula as relatively more premodern than the Spanish authors.⁴⁷⁴

The thesis of “Southernism” – the reduction of the South of Europe to a premodern relic of the past (Piperno (1997), details on section 1.6) is therefore reinforced, but one should also complement the above analysis made of content variables and semi structural variables with purely structural ones. In this regard migrant writers – all Anglo-Saxons – do not show up as particularly positive towards otherness in their epistemological empathy, an encompassing,

⁴⁷¹ This obtains both in external terms, or absolute figures (the average of the Anglo-Saxons is 2.143 times that of the Spanish) and internal terms, or density of extension (2.725), as per section B.9, tables B.30 and B.31. These results hold even excluding Franck Arencibia, on the grounds of its extreme negativeness and prejudiced rhetorical mechanisms, as seen above (in this cases the ratios are lower but still very significant, at 1.429 and 1.575, as per tables B.32a and B.32b, also on section B.9). Given the very small absolute number of Spanish writer, the analysis of averages is considered more appropriate than ranking position analysis.

⁴⁷² 3.5 times more than the Spanish as regards density and 6.4 times as regards density of extension, a difference which once more obtains even excluding Arencibia (in this case, ratios of around 3 times and 5 times). Liquid absence of rationality is worked out by a) subtracting the number of cases of rationality to the number of cases of absence of rationality, and then dividing the result by the number of words of each work (this produces an index in terms of density); b) applying the same procedure and considering also the degrees of generality (this produces density of extension). For the rationale on the subtraction see footnote 545, on page 301. As absence of rationality in liquid terms is a rather sophisticated indicator, it is not calculated in an external perspective (which entail using a not considering density).

⁴⁷³ For example, the purely content variable index of negativeness may not capture the self-containment of a sophisticated writer wishing to show up as less obviously negative, say, as Franck Arencibia, who even had to self-publish his work.

⁴⁷⁴ Overall, despite the fact that Spaniards use more the pair modern/traditional to gaze at the Iberian Peninsula reality, when Anglo-Saxons use the pair, they see more traditional society than modern society vis-à-vis the Spaniards. First, in terms of traditional society, the within-work share of Anglo-Saxons is slightly (10%) higher, while in terms of modern society the within-work share of Anglo-Saxons is only 40% of that of the Spaniards (See table B.summ, in section B.10, Annex B for this and for the results to follow in this footnote). Second, as regards composite density of extension, Anglo-Saxons show a slightly (10%) higher value in terms of traditional society, while being extremely low vis-à-vis the Spaniards in terms of modern society (a ratio of 10%). Lastly, showing the more intense use of the pair by the Spaniards, as regards density, density of extension and composite density, Anglo-Saxons show lower values for both premodern and modern society – but the difference is greater in terms of modern society.

systematic indicator of possible prejudice as regards the use of forms of knowledge epistemological processes⁴⁷⁵ – one of them (Arencibia, section 4.9) being extremely prejudiced in such regard; a theoretical expectation that migrants would tend to have a more sympathetic view towards otherness than tourists and travellers is therefore not observed⁴⁷⁶, suggesting that being an Anglo-Saxon has a strong effect (up to the point of counterbalancing the effect of being a migrant). Also, the form of knowledge mediation (which could be considered a good indicator of a positive epistemological attitude towards otherness as it involves merely quoting its members) is much less used by the Anglo-Saxons⁴⁷⁷, a similar (redundant) result also obtaining in terms of the source of knowledge *informants*⁴⁷⁸.

All these results accusing the Anglo-Saxons of a biased view should be, though, seen in the light of the fact that epistemological empathy presents no clear correlation with any of the two groups.⁴⁷⁹ Further, (as noted on sections 1.6 and 5.1) contemporary academic research holds, together with the Anglo-Saxons, that traditional influences persist in Southern Europe: could this view be still motivated by domination in the way of Orientalism? The question is most pertinent when, in the case of Portugal, references to the country's incomplete modernity, traces of First World and Third World and performance of (economic) functions peripheral to core Europe are made by members of some of the major Portuguese academic institutions (as noted above).

More generally, one should review the supposed bias ascribed to the notion of a **linear vision of history** which may underlie some (mostly economic) dimensions of the pair traditional/modern society. Such vision has been defined and criticized by postcolonial studies as the imagining of a progressive process that eventually will make all nations equally modern (e.g. Pratt (2008(1992):226), as detailed in the literature review). But in fact it is ingrained in the

⁴⁷⁵ If epistemological empathy is considered a measure of a positive attitude towards otherness, migrants should present high values in this regard, but data do not confirm it. On section B.5, Annex B, Figure 1, presenting epistemological empathy considering assessment, shows migrants evenly spread over the rank (Hewitt at bottom of rank around 35% of the average; Hewitt at mid rank at around 100%; Arencibia high in rank moving from 2nd to 3rd in rank and from 120% of the average to slightly less than 100% depending on the level on the parameters used. On section B.5, Annex B, Figure 2, presenting epistemological empathy not considering assessment, shows similar results, with Arencibia and Hewitt changing ranks.

⁴⁷⁶ Referring Mark Twain's writings Leitch (2009:4) holds that "when migrating, [he] judges phenomenon according to the terms of evaluation set down by the culture he is joining." (details on last subsection or section 2.6, page 88).

⁴⁷⁷ This is seen in that the average use of *mediation* by the Anglo-Saxons relative to Spanish writer is 0,58 (in terms of density), 0.71 (intra-work use) and composite index (0.55). See tables B.5 to B.7, section B.4, Annex B.

⁴⁷⁸ This result is inferred from the high correlation between *mediation* and *informants* due to methodological construction (as per chapter Chapter 3), which translates the fact that to mediate is (almost always) necessary to resort to informants.

⁴⁷⁹ In figures 1 and 2 in section B.5, Annex B, visual inspection does not show migrants, travellers or tourists forming clusters with similar positions in rank.

discourse of an important multinational institution such as the United Nation, which contributed to the decolonization process after the Second World War and where those categorized as less modern (or, in the term more frequently used by the the UN, less developed) have some voice.⁴⁸⁰

Therefore, if the Anglo-Saxon authors of the corpus are, because of their inclination towards traditional society in their accounts of the Iberian Peninsula, to be accused of some kind or degree of “Southernism”, the accusation should be quite specific. First, it should not be based on their linear vision of History – in fact, as seen above, the Spanish authors focus more on the pair tradition/modernity than their colleagues. Second, it should not lye on their *location* of Portugal and Spain in such path of “development”, as such location is to some extent performed in the same way by local academics. Third, and finally, in accounting for the presence of apparently prejudiced positions, one should bear in mind the possible non prejudice related effects of the focus on difference (which may magnify negative differences, as argued in 2.7, page 104) and of the fascination with the authentic (as theoretically developed in the literature review and empirically considered in the next subsection).

The fascination with the premodern condition

On the corpus as a whole one observes that images of traditional society tend to be more associated with the personal experience of the writer (they are mostly conveyed through the form of knowledge *description* and mostly sourced on *observation*)⁴⁸¹, while modern society associates more with forms of knowledge (*mediation* and *understanding*) and sources of knowledge (*indirect information* and *informants*) which require an active epistemological behaviour. This contrasts with the more passive attitude involved in the form *description*, although the choice of what to describe and what to exclude from description may be be also an active epistemological effort (and *mutatis mutandis* for the forms of knowledge). More

⁴⁸⁰ UN's Human Development Index neatly classifies nations into levels of development, ranging from low to high and generally increasing over time as its major components (life expectancy, levels of education and Gross Domestic Product per capita) tend to grow over time (the exception being inequality, which is included in some versions of the index). Such so called process of development does not seem to be disputed by most “non developed” countries nor its notion considered as a (renewed) imperialistic foray (possibly with important exceptions such of some autocratic regimes, religious discourses and the antiglobalization and/or movements). Interestingly, Portugal and Spain have been classified as having “very high human development” for last three decades by such index (which does mean, of course, that this is the general and permanent perception, mostly within the context of the economic and financial crisis which Southern Europe has suffered since the beginning of the 2010's.)

⁴⁸¹ Full description correlations on section B.12, Annex B.

specifically, the fact that modern society is much associated with the form *mediation* (which, in turn has an extremely high correlation with the source *informants*), suggests that the voices of people other than the author tend to talk (relatively more) about a modern world and that the voices of authors (that is, the cases of *description / observation*) tend to talk (relatively more) about a traditional world (albeit it should be noted that, ultimately, authors are responsible for including or excluding voices other than their own).

A possible explanation for this difference is that locals are taking for granted the premodern and are interested in (talking about) grand narratives of “progress” or “development” (fitting the linear vision of history), while the writers of the corpus as a whole take a symmetric stance – this latter proposition being the more plausible if it is the difference of premodernity that interests them, as they their societies of origin are overall more modern or developed than the otherness they contact with. This hypothesis of a fascination with the traditional is reinforced by the positive (albeit moderate) correlation between modern society and negativeness (when the exceptionally negative Arencibia is excluded) and the (weak) negative correlation between traditional society and negativeness.⁴⁸² Further, it fits well Turner's view (1987:152-3)⁴⁸³ that

the nostalgic mood is of particular importance in contemporary cultures in association with the loss of rural simplicity, traditional stability and cultural integration following the impact of industrial, urban, capitalist culture on feudal social organization. (...) it has been suggested that the theme of alienation in human societies represents a form of **ontological nostalgia** which perceives human beings, because of their consciousness, as alienated from the life-world of the human species.

It is as if Elias's (2000(1939)) civilizing process went too far in containing passions and in mediating life and making it more abstract or disembodied (Giddens (1990), see literature review for details on this and the references below), reducing the relevance of face-to-face interactions. The very development of sociology in the decades around the turn of the twentieth century was associated with a discourse on modernity structured by nostalgia (again Turner, 1987:147)⁴⁸⁴, a mood that can be found even later in Bourdieu (Reed-Danahay, 2005). Such “continued craving

⁴⁸² This would not necessarily contradict the possibility of a positive view on the modern by locals. As noted above, in the the form *description*, which is associated with the voices of authors, predominates overwhelmingly over forms of knowledge more associated with local voices, so these are much frequent in the corpus.

⁴⁸³ Quoted in Lisle (2006).

⁴⁸⁴ Quoted in Frow (1991).

for experiences of unmediated genuineness [that] seeks to cut through what Rousseau called 'the **wound of reflection**', a reaction to modernization's demythologization, detraditionalization, and disenchantment" (Bendix, 1997:8) would be the more intense in radically modern societies with high levels of self-consciousness (Giddens, 1990)⁴⁸⁵ where most if not all of the authors of the corpus have their origins. In other views such disenchantment with modernity would have, in the opposite direction, prompted the *blasé* postmodern reaction.

This phenomenon of the fascination with traditional, "authentic" society has also been identified in contemporary TW itself. Holland and Graham (2004:139) talk of a nostalgic urge in the genre, which they see in part as a reaction against "modernizing forces that are felt to compromise the specificity and/or authenticity of the world's different cultures". Echoing the (last minute) "salvage" or "redemptive" (identification of the survival of authenticity) modes of anthropologic nostalgia (Clifford, 1986 as developed in literature review), Holland and Graham (2004:139) hold that "travel writing serves, in this sense, to protect the idea of cultural diversity from the threat of homogenization and the undifferentiated sweep of global culture".

A case of this is contemporary TW on Mongolia, which is "framed as a traveller's frontier in part by placing emphasis on the significance of travelling there at a particular time, before the masses of tourists and homogenizing influences of globalization that are sure to follow" (Tavares, 2004:61). In Spanish TW writing of second half of the twentieth century there is concern about what is disappearing "in culture and in the collective conscience", and travellers become "agents of memory" in a world suffering deep change (Champeau, 2004a:336). In fact, a sense of belatedness was experienced as early as the end of nineteenth century by European travellers arriving at the Orient "at a time when tourism and colonialism had already turned the exotic into the familiar", having missed the "authentic experience once offered by a world that was already disappearing (Behdad, 1995:168).

Possibly because nostalgia and authenticity are so much talked about, it is not desirable for authors to explicitly engage in such *topos*, which is one of the most frequent criticisms performed by Humanities' approach to TW (up to the point of becoming a common place in itself). When one considers what is manifest in the texts (rather than the above-enacted perspective of deep,

⁴⁸⁵ Quoted in Borgatta and Montgomery (2000).

systematic patterns) this tendency shows up much less visible and unevenly spread within the corpus, showing the relevance of the quantitative thick description.⁴⁸⁶

It is thus that Richard Hewitt moves to Portugal mostly to enjoy natural beauty and to earn a living less stressfully in a place where for workers “everything was more important than 'professional' life” (:96). Besides such practical motifs there are other signs that he is not mostly guided by the authentic, as the social space that occupies most of the his text is a community not showing up exactly as a pure *Gemeinschaft*. The people of the village of Eugaria are trying to obtain access to the modern facility of piped running water and the author himself takes part in such endeavour, while at the end of the book it becomes fashionable (rather unlikely as discussed on section 4.3) for people to work in the capital city of Lisbon and live there. Julio Llamazares is in a similar position as he finds a significant presence of modernity (although the overall image of the region still tends more to the traditional side) in a mostly rural region (and undoubtedly much more rural than the otherness of the non-migrant authors). He is nostalgic, though, in including the past in its rendering of the otherness as are actually as all his colleagues of the corpus bar Stewart and Arencibia (details in the following section and in section 5.7).

For authors Paul Hyland and Datus Proper the past is part of the nature of the present they experience, which would make their cases harder to classify in this regard: they could be seen as the maximum degree of nostalgia (the present is tainted with the past) or the zero degree of nostalgia (there is no gap between present and past, so no room for nostalgia). The second possibility seems more likely if one considers that in their texts it is mostly the “historical” past of “great” events and characters – which given their high degree of generality and association with high politics tend to be (seen) as more distanced from authenticity – rather than, say, the intimate micro and social history of Cela’s “endearing creatures” (section 4.4).

In turn, Chris Stewart shows the highest levels of traditional society in the corpus, but his otherness is obviously rural and he moves to the Alpujarras region in search of relaxation, tradition not being an obvious motif and the past being absolutely absent. Similarly, although Polly Evans shows the second highest level of present(ific)ation of the past, she is non nostalgic as her writing is down-to-earth and casual even when dealing with past events and characters;

⁴⁸⁶ Here, of course, it is not important whether writers’ accounts are sincere, as we are dealing with the attitudes they decided to present.

further, she confesses going to Spain and taking the bicycle to free herself from her former professional career and not to perform an existential escape into an idyllic social structure.

Miranda France mostly deals with, and tries to explain the contemporary reality of Spain and shows the second highest scores amongst the writers on Spain in what regards modern society. At the end of the book, though, she takes her baby to a village to be jumped over by a man dressed as the “devil” who is traditionally supposed to confer protection to new-borns. It is not clear if this is to be taken as mere participant observation (in the process France interrogates a local woman about the effectiveness of the ceremony) or some form of search for authenticity, but the latter drive is not found elsewhere in her book. Such doubt does not apply to Franck Arencibia, who is clearly immune to nostalgia: he shows extremely low values in terms of traditional society (albeit this also happens with modern society) and it is difficult to imagine him searching for something positive as authenticity in a country which he presents so negatively.

Finally, in *Nuevo viaje* Camilo José Cela's does not engage often on such quest, as his intensity of images of the modern is very much above the average of the writers on Spain (while this also happens with his images of the traditional, the difference is lower here). Yet, besides the significant presence of the past (detailed below in this chapter) his work features the most nostalgic excerpt of the corpus: the reference to the endearing creatures (section 4.10). In it, the authenticity in social structure and social relations that, given his tone, Cela seems to be ascribing to the past, premodern world in which those people lived, is reinforced with other types of authenticity, covering almost completely the typology proposed or identified by social science literature (see literature review chapter and specific section on him). The endearing creatures include also the affirmation of the individual, presented as free from social constraints through what can be conceived as somewhat eccentric features or activities, seemingly ignoring social disapproval even relative to the society in which s/he lived.

Cela also enacts a type of authenticity that opposes capitalism/commodification, as the endearing creatures engage in productive/commercial endeavours of small scale and individual nature. In this, the Spanish author illustrates a type of opposition to capitalism that – rather than criticizing, as other views, as inequality contrasting with an ideal, premodern (or even preagricultural) (more) even distribution of income/wealth between human beings – focuses on the nature of the production process, which is deemed authentic and therefore generates authentic products only if it is not massified. All in all, even if restricted to the endearing creatures, these

varieties of nostalgia for the authentic are very important for Cela – up to the point of taking him to completely abandoning his so often presented anti-knowledge stance and lamenting that there is “a true history of Spain which nobody will ever write”.

5.4 – The present(ific)ation of the past, or time distorted by space

Clearer than the fascination with authenticity or traditional society is the pattern of present(ific)ation of the past, which is significant for all authors in that it occupies a very significant percentage of their texts, except in the case of migrants (as noted in the specific sections of chapter 4). In contrast with the History book, where the past is a motif in itself, the pattern at hand consists of associating different periods and moments by means of places / areas – or, more exactly, by the designation of places / areas (e.g. “Portugal”) in a process by which time is overcome by space.

Non-migrant authors thus forget that the social world they write about is, in each historical moment, most probably much closer to its neighbouring social spaces (say, “Portugal” and “Spain”) than to what it designates much before or much later (say, “Portugal” in the thirtieth century and “Portugal” in the twentieth century). (Writer Paul Hyland, for example, provides long descriptions of events and people within the “grand” History of the country, while proclaiming that “if it’s lost its role and its riches, at least it can be not-Spain”, in a kind of definition by (postmodern) *différance*.) To that one must add, in the case of Portugal, the relevance of a past which materializes and is reachable through direct experience in the present⁴⁸⁷.

What reasons could there be for such an important intrusion of the past within FLO, a genre taken as mostly a description of contemporary experience of difference (section 1.2)? The more immediate, practical answer would be that writers find in History books ready-made information somehow related to their subject. In contrast, indirect sources on the present are more dispersed both in their physical or electronic locations and in the density of “important” people, events or trends, because they compete with time spans of hundreds or thousands of years. It could also be argued that there is inertia in genres, and the author who is willing to succeed feels obliged to follow established conventions.

⁴⁸⁷ The theme *past* (which captures this pattern, as per section 3.9 on definition of themes) is the fifth most important theme in terms of density of extension for the authors writing on the country (section B.7 on themes on Annex B).

The question remains, though, of why the inclusion of History in FLO has been and still is a successful marketing manoeuvre or at least why an author or publishers would consider it as such. The abovementioned explanations are also insufficient because to a great extent they dismiss the agency powers of writers, not paying attention to what Bourdieu's (1979, 1980) calls the struggle in the field of literature between the heteronym hierarchization principle (favourable to those with power in the cultural, economic and political fields) and the autonomous one (art for art's sake)⁴⁸⁸.

There is room, then, for other accounts based on culture as conditioning and empowering both writers and readers. One already partially dealt with above is that the past is a door to (imagined) authenticity, namely that of traditional society. Speaking of the importance of heritage, Culler (1990:5) claims, echoing MacCannell (1999(1976)), that one of the characteristics of modernity is the belief that authenticity has been lost and exists only in other regions or countries or in what was. Strong (1978:46-7)⁴⁸⁹ sees heritage as “some kind of security, a point of reference which (...) seems stable and unchanged” in face of the “problems and troubles, of changes within the structure of society, of the dissolution of old values and standards”. This is probably the drive that have lead Portuguese Nobel Prize of Literature and communist José Saramago to ignore in his *Viagem a Portugal (Journey to Portugal)* the world of work and describe a country which is built *a priori* in palaces, castles and other monuments (Matos, 1999:485).

Echoing Giddens (1990), Walsh (1992:12) talks of the loss of the “**sense of place**” of the pre-industrial context, “an attachment to, or knowledge of, one’s locality, an understanding or appreciation of the processes which have affected a place, both through time and space”. According to him this has been replaced by **disembedding**, “the continual distancing from the local, of the processes which affect people’s lives is an important element in the experiences of living in the (post)-modern world”, which derives from the time-space compression associated with the development of mass communication and transport⁴⁹⁰. Contributing as well to such sense of loss would be the separation of people from production processes – not only as producers, as in Marx's notion of the alienation of workers, but also as consumers, due to lack of

⁴⁸⁸ According to Dirks's (2000:121-130) presentation of Bourdieu.

⁴⁸⁹ Quoted in Urry (1990(2002)).

⁴⁹⁰ Interestingly, Giddens (1990), who coined the term disembedding resorts to the expression “time-space distanciation” to refer to Walsh’s “time-space compression”, as per subsection “Varieties of postmodernity” on section 2.4.

awareness of the origins of products and services consumed, to which adds the inauthenticity ascribed to mass production processes (see section 2.3).

There are also insufficiencies in this focus on the effects of modern society when trying to explain the present(ific)ation of the past. First, some (albeit not all) of these views may suffer from modern nostalgia themselves, as illustrated by Strong's (1978:46-7) use of the abovementioned expression “*dissolution of old values and standards*” (my highlight) instead of what would be a more neutral “*transformation of values and standards*”). Second, nostalgia is not an attitude solely observed in modernity: the Grand Tour included visits to the cultural centres of the time but also focused on the remnants of classic culture (Borgatta and Montgomery, 2000:3166), with TW itself being throughout the ages frequently motivated by nostalgia, “the search for 'other' times, as well as places” (Huggan, 2009:135). In several historical periods a myth of decline from a “Golden Age” has arisen – for example, with the rediscovery of Antiquity’s greatness in the late sixteenth and early seventeenth centuries many people were predisposed to suppose everything in the past superior to anything in the present (Lowenthal, 1999:87); further, the past has often been seen as “the epitome of coherence and order, something which was more simple and emotionally fulfilling, with more direct and integrated relationships (Featherstone, 1995:107). More specifically, Pearson (1985)⁴⁹¹ holds that successive generations resort to the myth of the good old days, the notion of “a less violent, more law-abiding and harmonious community in the past of their childhood or parents’ times”.

Could there be a mechanism through which the (in many cases imagined) idyll of childhood – the (feelings of) belonging, protection, stability (much of them provided by the safeguarding children against disagreeable news, including the mass media), is extended to everything that is gone? The question of travelling in space to travel backwards in the self's own time shows up in travel writer Graham Greene's *Journey Without Maps* (1936) through Liberia (details in literature review), taking the author “via memory, into the mapless jungle of his childhood and adolescence” (Blanton, 2002:62) and allowing him to experience a more primitive stage of his own culture (Dodd, 1982:130). In his own words, Greene finds that in Africa, “the sense of taste was finer, the sense of pleasure keener, the sense of terror deeper and purer” against his “disappointment with what man has made out of the primitive, what he had made out of childhood” (:225). According to Blanton (2002:70), the tendency is also found amongst later

⁴⁹¹ Quoted in Featherstone (1995:107).

twentieth-century writers, especially V.S. Naipaul, for whom loss of order and tradition engenders sadness, prompting him to use India similarly to the way Greene uses Africa.

On the whole, the past represents safety as it is by definition completed, not prone to transformation (assuming that only professionals of History or people more informed than the reader are aware that it is constantly being rewritten), therefore immune to decay. In many cases it can be found literally in physical heritage (to which the non-migrant authors often refer), which decays usually in time spans larger than generations and can be frozen by conservation (as seen above). As conveyed by FLO in the present(ific)ation form, the past is a foreign country which the reader visits alone, without the company of (mass) tourism, enabling her or him to perform Urry's (1990) romantic gaze.⁴⁹²

Finally, more than being made of social forces, the past is usually made of individuals, such as kings, great politicians or plebeian, common people who took noble, heroic actions – at least in its Grand History form presented in the corpus. This opposes a complex account made of an interplay between people and groups; material circumstances; social relations and hierarchies; culture; and randomness, and would be a way of fitting Schlesinger's (1971:339–57)⁴⁹³ view that “historians endow the past with an ordered clarity contrasting with the chaos or imprecision of their own times”. In the process authenticity is produced in the sense of agency overcoming social structure (see next section) and even chance (possibly more omnipresent than social structure is the notion that people's lives are often determined by isolated events they do not control).

More specifically, albeit visions of what was are powerful elements in the construction of the present (e.g. in nationalisms, as per section 1.4), the type of past which is present(ifi)ed in corpus is notably devoid of contemporary consequences: in most cases a(n non-mega) event that took place three or more generations ago (a small time span for the whole of History) is not connected to the present by causality, but only by the sharing with it of (the designation of) a space. This would suppress at least one aspect of “the chaos or imprecision of our own times”, producing a kind of apolitical safe haven in the sense that old times' struggles for power do not directly affect contemporary life. Such suppression would allow individuals/readers in

⁴⁹² Following the massification of Peter Mayle's books on Provence (see literature review), Lady Fortescue's *Perfume from Provence* (1935) “has become the middle class's new talisman of rural France” (Sharp, 1999:216), “a true positional good that cannot be obtained and so cannot become passé like [Peter] Mayle's depictions” (Sharp, 1999:225).

⁴⁹³ Quoted in Ingold (1996:171).

contemporary democracies to see politics at play in ancient times without noting, as they do in their own times, the games involved in the competition for elected posts, whose incumbents will affect their lives. The authenticity of the past would thus be reinforced in contrast with the paradox that the democratic process in contemporary society shows up much as a struggle between ideas but mostly aimed at power. (The utopia of a (paradoxical) authoritarian order where individual liberties are not restricted would justify the authenticity (in the sense of self-desinterested regard for the people by the rulers) often ascribed to Enlightened Despotisms, revolutions, authoritarian coups or regimes, as well as to contemporary powerless, non democratic institutions such as the Spanish and the British monarchies).

5.5 – The aestheticization of the social and specific functions of factual literature on otherness

Commenting on Xavier de Maistre's (1794) *Voyage Around My Room*, Botton (2002:246) writes that the work is based on the insight that “the pleasure we derive from journeys is perhaps dependent more on the mindset with which we travel than on the destination we travel to.” For Botton, such mindset corresponds to the traveller's receptiveness to the travel experience, allowing her/him to “find a supermarket or hairdressers unusually fascinating. We dwell at length on the layout of a menu or the clothes of the presenters on the evening news.”

This fascination with things that other mindsets would not consider worthy of note is fostered, of course, by a disposition associated with an escape from the world of work (and the sheer free time it entails); however, arguably many people who do not (regularly) work may feel such fascination as well, so other explaining factors are needed to account for it. One of them is the conscience of being abroad, elsewhere, within otherness or – to adapt Costa's (2002:24) conceptualization of the public's experience of hallmark events such as the 1998 Lisbon World Exposition – the feeling of “direct experience” or the possibility of testifying that one has “been there”. In the same vein, Urry (2002a) asks why travel takes place despite the development of new communications technologies, suggesting that **corporeal proximity** makes travel necessary and desirable, a view to which (Noy, 2009:219) adds travel's promise of transcending mediation (see page 76).

This, too, does not seem to be the whole story of “the pleasure we derive from journeys”: FLO shows that people are also interested in their own societies or cultures, as the genre includes

various works focusing on the home country of their authors and there are many cases of FLO books achieving major sales in the country which they deal with (as detailed in section 1.2). The corpus being studied suggests that the receptiveness to which Botton refers may stem from seeing things in a wider context (dismissing the necessity of a physically distant otherness, then), similarly to the concept of sociological imagination, defined as “the vivid awareness of the relationship between experience and the wider society” (Mills, 1959)⁴⁹⁴ or as “the ability to see our own lives and those of others as part of a larger social structure” (Brinkerhoff *et al*, 2005:3).

Given such attitude may be hard to find in daily life, the written form may be a privileged platform for such observation. Within the present corpus, in *Uma casa em Portugal (A cottage in Portugal)* author Richard Hewitt hires a construction worker through a verbal agreement, upon which he is offered a cigarette by the worker. Presuming this to be part of a “ritual” necessary to seal the deal, he imitates the worker by inhaling smoke once, throwing the cigarette to the ground and immediately stepping on it (:77). A similar attitude is found in the work of cyclist tourist writer Polly Evans: arriving in a house where she had booked in advance a room and seeing the surprise of the owner when she apologizes for being “so late”, she makes sense of such reaction by reference to disregard for punctuality as a cultural trait. (*It's not about the tapas*, page 40). In *Backwards Out of the Big World*, Paul Hyland writes about taking a bus “through contemporary Portugal” (:194), upon which he describes a factory, a major road, construction works and “a swathe of dishevelled land through pine and eucalyptus forest”.

Each of these excerpts illuminates the social nature of the wider context under consideration (and mentioned above). They are cases of what is here called the ***aestheticization of the social***, a pattern common to FLO (but not exclusive to it, as developed below) and arising in two forms. The first consists in considering an individual person, thing or activity in terms of its representativeness/symbolism of a community/society/culture featuring a higher level of generality (in some cases based on previous or even a priori notions of such community / society / culture) without regard for the validity of epistemological process linking the lower and the higher levels of generality. Such process is not shown and/or discussed and, consequently, there is no regard for the validity of the outcome either⁴⁹⁵. Therefore, it does not even amount to

⁴⁹⁴ Quoted in Wikipedia.

⁴⁹⁵ This aesthetic experience of the social also fits in part recent notions of aesthetics. According to Davies *et al* (2009:136) “in the last few decades (...) there has been a movement away from the narrowly art-oriented approach and toward recognition of the continuity between experiences of fine art and experiences from other domains of life.

rhetorical induction (a process in which the use of a specially communicative example or the accumulation of examples tries to persuade the reader about general propositions, as per Edmondson, 1984:12) either because it consists of a mere recognizing of *a priori* assumptions or because there is no accumulation of examples.⁴⁹⁶

This first form of the aestheticization of the social corresponds partially to Culler's (1981:127) definition of the “the tourist (...) [as] interested in everything as sign of itself, an instance of a cultural practice”. It is however broader in that it can be performed by an individual under conditions other than that of tourist⁴⁹⁷ (at least in the sense defined in section 4.2). For example, the flâneur (or stroller) can also act as aesthete of the social: his observation is detached – he provides no “prescription or remedy” (Baldwin *et al*, 2004:276) – and simultaneously engages in the identification and classification of urban types (Matos, 1999:100; Tester, 1994⁴⁹⁸) based on the appearance of people, the validity of which as an indicator (e.g. of profession or status) may have been disputable in the nineteenth and early twentieth centuries and certainly is in the new millennium.

The second form of the aestheticization of the social consists in a direct focus on the social in its generality. Within the conceptual framework used in this work, it translates into images in a domain of the social world⁴⁹⁹ with a level 2 or 3 of generality (level 1 being excluded because it refers to concrete situations), a characteristic of which is the absence of implicit or explicit comparisons with other comparable entities. A typical example of this is the quotation of statistics without inserting them in a time series or in a cross section analysis⁵⁰⁰ (a

This (...) has given rise to an emerging sub-discipline often known as 'everyday aesthetics' or 'the aesthetics of the everyday'. [Such] theorists (...) claim that objects and activities not essentially connected to art or nature can have aesthetic properties and/or that they can give rise to significant aesthetic experiences”. For such reasons, the term aesthetics is used as root word.

⁴⁹⁶ In the above-mentioned excerpt from Hyland – in which he takes a bus “through contemporary Portugal” (:194) and then describes several elements of such condition – there is no rhetorical induction because the various examples of “contemporary Portugal” are provided *after* the general proposition is made. This is a mechanism much frequent in Frank Arencibia (see section 4.9). A pure process of rhetorical induction would involve probably the feeling of progressive discovery by the reader, thus reinforcing what is trying to be conveyed.

⁴⁹⁷ In as much as de-differentiation (Urry, 2002(1990) is a relevant and widespread phenomenon, this distinction may be irrelevant as tourism becomes indistinguishable from other leisure activities. See section 2.4 for details.

⁴⁹⁸ Speaking of notion of the flâneur as illumination of Walter Benjamin's methodology Tester writes: “*Flânerie*, in other words, can be associated with a form of looking, observing (of people, social types, social contexts and constellations), a form of reading the city and its population”. (Tester, 1994:82)

⁴⁹⁹ Definition on section 3.4, last subsection.

⁵⁰⁰ Frank Arencibia (section 4.9) performs such kind of quotation of statistics, but he would not be considered as engaging in aestheticization of the social because (as argued in the same section) his motif seems to be different (an *a priori* intention of presenting a negative portrait of his otherness).

practice very common in guidebooks). More so than in the first form, no will to knowledge is present – at most an intention of *resemblance* to knowledge.⁵⁰¹

This epistemological looseness of the aestheticization of the social seems to underlie MacCannell's (1999(1976:155)) claim that "pretension and tackiness generate the belief that somewhere, only not right here, not right now, perhaps just over there someplace, in another country, in another life-style, in another social class, perhaps, there is genuine society." Developing this reasoning through what it seems its logical path, in the view of MacCannell's tourist (this is what the author is referring to in the quote above) authenticity could be found also in any social group within the society/culture to which the observer belongs (also "right here, right now", then). That would replace the definition of otherness as a geographically, chronologically and/or culturally faraway entity with the notion of a social object constructed through the aestheticization of the social⁵⁰².

Paraphrasing MacCannell (:192), almost "anything that is remarked, even little flowers or leaves picked up off the ground and shown a child, even a shoe shine or a gravel pit, anything, is potentially" a *sign of the social* (*attraction*, in the author's original phrase). The *social sight* produced by the aestheticization of the social is constantly being (re)created either at home or abroad, and does not necessarily refer only to premodern society (thus helping to solve MacCannell's apparent flaw that tourists wishing to escape modernity mostly visit modern countries). What is here at stake is a drive for whole(some)ness: seen from afar in the perspective of its entirety, a social entity or a social situation arises to the imagination more easily as an integrated system in its complete set of relationships⁵⁰³, in opposition to the closed, concrete

⁵⁰¹ The aestheticization of the social could be seen, then, as a particular case of the **aesthetic relation to knowledge** or the **aestheticization of knowledge** (in opposition to a pure or epistemological relation with knowledge). The most common form of such mechanism is possibly a tendency to refer to supposedly complex ideas without defining them or not trying, when that is possible, to divide them into simple(r) ideas accessible to larger and more varied audiences (Hopefully, this is not the case with the very notion of aestheticization of knowledge.) The prevalence and intensity of the aesthetic relation to knowledge could be a major difference dividing Anglo-Saxon cultures from others, namely those of the South Europe including France, but that would deserve, of course, a study in itself. Be as it may, Blanton (2002) is possibly, at least in part, referring to aestheticization of the social within the Anglo-Saxon world when he holds that Bruce Chatwin's *Songlines* is "more concerned with Aboriginal nomad as metaphorical object than as ethnographic subject."

⁵⁰² In the very definition of FLO in section 1.3, otherness is seen as based on an act of distancing towards the society/culture which is experienced (either one's own or another), rendering the other as object and implying that such society/culture needs not to be foreign.

⁵⁰³ One should note here the similarities with classical anthropology, described by Featherstone (1995:136) as assuming the isolation of the tribal societies to "lessen the problem of 'contamination', and preserve in a purer form the unique features which can be assumed to cohere into an integrated whole." Contrary to the (pure) aesthetes of the

experience of society made of fears, frustrations, limitations and incongruities one has in one's own everyday life⁵⁰⁴ (along with possibilities and positive feelings, of course).

Within modernity (or late modernity or postmodernity, as discussed in the literature review) the aestheticization of the social converges with Giddens' (1990) notion of reflexivity in taking the social as object. But while reflexivity is worried about epistemological validity and searches for ways of changing the object for the better, the aestheticization of the social is merely gazing at it, as into a work of art⁵⁰⁵. Not caught up in what Rousseau called the "wound of reflection", it provides an experience of the social without suffering the dilemmas of how to better conciliate multiple interests and the very constraints of the social.

FLO is specially suited for a (highly sanitized) enactment of the aestheticization of the social that avoids such issues. The solitary act of reading (a way of prompting the mindset mentioned find by Botton in the journey above) temporarily separates the reader from the society that surrounds her/him and influences his life. The separation extends even to the primary group and significant others, producing a real backstage where the reader is totally at will (with the caveat, of course, that even not being observed, culture is embodied in the individual and that the liberty of the reader would extend to other genres – possibly the novel with higher intensity). Adding that otherness presented in a mediated form in texts cannot instantly influence or being influenced by her/him, and that no would-be fellow tourists are looking at the object rendered by FLO, we find the ultimate, distanced, romantic gaze à la Urry (1990), feeding the "romantic

social, though, anthropologists usually care about and discuss the epistemological validity of their representations of otherness.

⁵⁰⁴ The author of this study remembers hearing in his childhood a description of his father trying to get a ride in a French motorway and of that being impossible because all vehicles were fully loaded with families and their luggage running south to the Côte d'Azur. Until some (recent) more serious reflection on the matter, the author imagined those ephemeral figures passing on the motorway as fully representing utopian, perfect, families – nonetheless because they were foreign. Such view ignored of course, say, traffic jams or the disagreements, to say the least, so common within vehicles carrying families in long journeys in any part of the world. Such view forgot the author's own experience – how he would get bored in the journey south (in our case, to the Algarve), how he would fight for space with his brother in the backseats, and how his own father would be enraged about having to make an unforeseen stop for the boys to go to toilet when they had clearly been warned during the previous stop that they should take the opportunity to do so.

⁵⁰⁵ In the discourse on contemporary art it is common to hear that a work of art questions (the definition of) art itself and/or society. Such questioning can not, however, be called reflexive because the forms used to convey it (paintings, sculptures, etc) are too abstract in that they do not allow "questions" containing an interrogation mark nor prompt answers in terms of a choice amongst well defined alternatives (say "yes" or "no"). The notion of such questioning would be a case of the abovementioned aesthetic relation to knowledge, defined on previous footnote, as it would be the very pretension of its validity sustain by the discourse on contemporary art.

desire for positional goods” (Walter, 1982:303)⁵⁰⁶ (which can also be present in the textual consumption of the pattern of present(ifica)tion of past, as seen above).

More generally, considering that FLO accomodates both the aestheticization of the social the present(ifica)tion of past (at least in the corpus at hand, as per previous section), the genre accounts for the designation of a physical space/society/culture (e.g. “Portugal”) in a most complete manner, covering the two temporal dimensions of what was and what is (sometimes conflated, as in authors Hyland and Proper). In turn, each of these dimensions as rendered by FLO replicates one of the elements of a major sociological duality (or dualism, depending on the author dealing with it): agency versus structure. The present of the aestheticization of the social deals with social structure and/or culture and is a major source of FLO writers and readers’ fascination with their own contemporary societies (often complementing or being complemented by information where the issue of validity is important, such as that gathered from scientific sources). Showing how the other element of the duality is also important, the past of the present(ifica)tion process renders the strength of agency – the notion that “personality matters” – through the description of (mostly) great historical figures such as holders of power (e.g. Kings) or heroes (e.g. revolutionaries), presented as acting to a great extent independently of social constraints. Arguably, such broad coverage is at the heart of FLO success with readers.

5.6 – A stance on authenticity

While the excerpts of the corpus where the issue of authenticity is explicit are quite few⁵⁰⁷, other deeper patterns suggest its relevance. On previous sections we have seen how the fascination with the premodern condition is a search for the authentic (5.3), and how the search for the authentic can be enacted by considering the past of a place through present(ific)ation (5.4) and by considering the present through aestheticization of the social (5.5). These processes are performed, though, either without epistemological relevance (present(ific)ation disregards causality between past and present and the second form of the aestheticization of the social does not add relevant knowledge) or without epistemological validity (the first form of aestheticization of the social does not care about the representativeness of the lower generality case). At the same

⁵⁰⁶ Quoted in Urry (1995).

⁵⁰⁷ The absolute frequency of the theme “authenticity” is 11 for the 1,294 images of the social world found in the corpus, meaning that relative frequency is a mere 0.85%.

time, as seen on literature review and elsewhere in this work, studies on tourism are sceptical of the possibility of tourists finding “the real thing”.

Would this mean that the search for authenticity in tourism (and in other cultural forms, including the corpus at hand) involves the tourist (along with the reader of FLO) in a deception both/either self-inflicted and/or staged by locals and intermediaries that makes her/him the “idiot of travel”, as in the expression of Urbain (2002(1991))? It would seem at first sight that answering yes would have the serious consequence that, if authenticity did in fact not exist as an essence, such people be depicted as lacking rationality. It should be noted, however, that myths and religions are studied within social science regardless of the scientific validity the corresponding beliefs: as the search for God(s), the search for authenticity consists in exerting Weber's *Wertrational* (value/belief-oriented rationality), so even if tourists (and readers of FLO) are deceived – and some are willing to participate in the deception, as the post-tourist (Urry (2002(1990), Noy (2009)), the postmodern tourist (Ritzer and Liska, 1997) or Cohen's (2004) recreational and diversionary tourists – that does not seem to entail serious consequences in peoples lives apart from increasing (possibly temporally) their sense of meaning (as religion would perform throughout a lifetime)⁵⁰⁸.

Possibly more relevant is the point of view of locals. Here Cohen's (1988) notion of emergent authenticity – a process that can be seen as a case of Hobsbawm's (1992(1983)) invention of tradition – seems useful in highlighting the possibility that (cultural) practices which at a given moment are not considered authentic may through recurring enactment end up by being considered so locally. It is thus that Cohen argues that commoditization may foster the emergence of (such) authenticity, besides noting that commoditization may help “authentic” traditions to survive by financing them. Ultimately, then, the existence of authenticity from the point of view of locals should be an empirical issue which may be answered by surveying participants in a cultural practice.⁵⁰⁹((texto da nota é rep: retirar))

One could use the same approach to capture tourist's feelings vis-à-vis authenticity, but that would not tell us if what tourists actually get the “real thing” – which is implicitly to ask if the “real thing” can exist at all. This takes to the next logical level, the consideration of authenticity

⁵⁰⁸ MacCannell (1999(1973)) actually suggests that the search for authenticity has replaced religion in contemporary society.

⁵⁰⁹ One could use the same approach to gauge tourist's feeling of authenticity, but that would not solve what is considered the issue for many students of tourism: what tourists actually get is the “real thing”?

from the point of view of the social scientist. Despite the importance anthropology attains to the emic perspective, it necessarily must elaborate on the information collected on the field (at least in the non-postmodern version, as the postmodern version aims mostly at just conveying voices of otherness, something which apparently the non social scientist could also perform). Likewise, if sociology is to overcome common sense, it must overcome the very common sense of locals (meaning the necessary transcultural myopia of any individual whose primary professional task is not to study a community in a systematic way as scientists endeavour to do).

Here, however, the underlying question – can the “real thing” exist? – translates into “can authentic social life exist?”, and no criteria seems able to answer it. In the context of tourism and, more generally, of the contacts between otherness and its outsiders, the approach should perhaps be reoriented towards the more modest issue of the existence of transformation by the (external) gaze, that is, to inquiry whether a culture (or parts or dimensions of it) has or has not been changed (and to what extent) out of interaction with a specific type of outsiders: the gazers.

This would have the advantage of differentiating people who visit a place with the sole intention of observing it from, say, migrants who move into otherness as individuals (or extended families at most) trying to earn a living and playing basically by the same (market) rules as locals⁵¹⁰. The categories arising from such differentiation should be taken more as informative than normative, not being considered in terms of moral assessment or as the basis of concrete policy recommendations as to cultural preservation. If the notion that hybridity rather than cultural purity is the most frequent condition of cultures (Bendix, 1997:9), even the hybridities of the extreme contrast of transformation by the gaze of mass tourism versus transformation by individual migrants in search for material resources would not be a clear cut in such regard.⁵¹¹

Finally, a grand notion of authentic should be replaced by a specific one seeing the authentic seeing it as “not transformed by something” (the non morally charged equivalent of “not corrupted by something” of the nostalgic stance); consequently, the grand notion of a culture or practice not corrupted in any dimension should be eschewed in favour of specific analysis of transformations (indeed a major component of the activities of sociologists). Also, the view of

⁵¹⁰ This excludes state-sponsored settlements such as those in the territories occupied by Israel or Morocco's Green March over Western Sahara in 1975.

⁵¹¹ Even more difficult to classify in such normative terms, of course, would be transformations produced by non pure gazers such as modern anthropologists (who merely wish to know local life) or missionaries and social policy workers (who merely wish to improve local spiritual/material life).

social science and the view of locals on authenticity should be combined in a global framework which considers differences between them.

In the case of the transformative factor tourism, one could conceive, say, of a culture which has been significantly changed in some material ways (e.g. its economy has been reoriented to catering for visitors) and some cultural ways (there are now a few new/adapted local products and performances induced by tourism). At the same time, such culture could remain authentic from the point of view of locals (or some of them), who may have moved from working in industry to hotels but now often participate in events presenting their culture, including some emergent authenticity which they felt as part of their culture.⁵¹²

Besides considering the group of locals in their specificity, such procedure would consider *individuals* in their specificity, as a survey may find different levels of perceptions of authenticity within locals, which should not be considered *a priori* an integrated whole as desired by those nostalgic of the (supposed) wholeness of tribal or traditional societies; further, it would avoid the gazer's nostalgic aestheticization of the social in which any transformation of otherness is undesirable (possibly because the benefits of such transformation are not felt by the gazer, who may then be happy with transformation of an improving nature only in her/his own society)⁵¹³.

5.7 – Actual and recommended modes of relation to otherness

The patterns and mechanisms identified in the corpus point to several modes of relation and reaction to otherness. They are significant not only as indicators of the writer's attitudes but, given writers' condition as mediators rendering societies and cultures for readers, they hint at what appeals to such public and may be signs of broader relations of the West(ern reader) to

⁵¹² This would allow for accommodation of possible criticism of romanticization of otherness aimed at views such as Greenwood's (1989(1977)) (see page 77 and subsequent pages), who held that before Fuenterrabia's municipal government-promoted arrival of tourists the meaning of a local cultural practice rested on the inhabitants' «understanding of the whole system of beliefs reaffirmed (..) through dramatic reenactment and commentary» and suggests that after that the local culture was destroyed. Approaching his position in light of the analytical framework here proposed, it could be said that the town's culturalscape had been *transformed by the gaze* while authenticity may or may have not remained for locals.

⁵¹³ In other aspects, of course, disregard for individuals may have more serious consequences. How can one view in this regard mothers who escape from Amazonian tribes – perhaps some of the most “authentic” societies for some academic views and most probably for a major part of non specialists – so that their handicapped children can escape being killed according to local traditions? Atini's website (<http://www.atini.org/>), a Brazilian NGO founded by a methodist missionary who fights against tribal infanticide reports such a case. The website also quotes (without further context, it should be noted) João Pacheco de Oliveira, a member of the Brazilian Anthropology Association as holding that “Taking the Indians out of their villages to raise them within Christian ethics is a violent interference, not a humanitarian project” [my translation from the Portuguese].

otherness and reality in general. This is a non-exhaustive and complex framework, not always featuring clear, absolute clusters of authors, with different possibilities of grouping works depending on the dimensions considered, as follows.

In terms of *epistemological premeditation of the contacts with the otherness*, the expectation that amongst migrant authors subsistence as a goal overcomes the intention of acquiring knowledge was fulfilled. Tourists Llamazares and Evans do not show up as preparing their journeys with knowledge in mind while, always peculiar, traveller-tourist-of-himself Cela establishes his route based on a former *Journey to the Alcarria*. Only pure travellers (Hyland, Proper and France), once more as anticipated, claim and/or show up as pursuing epistemological goals. Matching this latter result, the corpus shows a hierarchization tourist-traveller in which the latter shows more *epistemological depth*; migrants, though, are less profound than travellers and even tourists, so that it seems once more that participation in otherness (trying to earn a living there) may hinder observation.

Epistemological depth, in turn, has been shown to be quite independent from the degree of *renderization of the experience*, a pattern that opposes the *idealization of otherness* in its various forms (develop below). Chris Stewart is an extreme case of the former pattern, building his portrait of the social by resorting to overwhelming observation relative to other sources of knowledge, not using indirect information, engaging in description much more than his colleagues and showing also the lowest extension of knowledge of the social on the corpus. His consequent low level of generality contrasts with the ambition of Franck Arencibia in portraying a whole country through a topical structure aiming at a *ethnographication of otherness* in terms of the organization of the work and the breadth of the topics covered. There are, of course, radical differences between his *Spain* and the written report usually produced by anthropologists, as regards method (he resorts to prejudiced epistemological mechanisms), issues covered (the topics are not always the same as in the ethnography, being closer to those of an extended guidebook) and cultural relativism (he engages in comparisons as to the worth and potential of Spanish/European societies against North America).

Opposing Stewart from another front, all his colleagues bar Arencibia and Hewitt perform *intemporalization of otherness* by using the mechanism of the present(ific)ation of the past to a significant extent. Taking it to an extreme form, authors Hyland and Proper assume that only space, not time, can produce the other (e.g. differences between contemporary Portugal and

contemporary Spain are presented as greater than those between contemporary Portugal and the “old” Portugal) and consider that the bygone is essential to what they see as an almost eternal social entity. Somewhat paradoxically, their present(ific)ation of the past amounts to a zero degree of nostalgia, as the absence of gap between present and past implies no room for longing for the past (as argued in detail in section 5.3).

By not limiting themselves to the realm and time of their experience within the otherness, all the remainder authors of the corpus with the exception of Chris Stewart and Franck Arencibia engage in several *varieties of nostalgia*, in as much as nostalgia consists in a longing for something supposedly perfect or wholesome which one imagines it has existed or it exists elsewhere (e.g. in otherness, as per MacCannell's proposal of the search for authenticity, or even in fiction, as per France's inclusion of *Don Quixote* in her work)⁵¹⁴. Specifically, opposing Stewart's renderization of the experience from still another front, Hewitt engages in a kind of idealization of otherness, which amounts to a mostly authentic, premodern mild wilderness (made of close social relations, equality, machismo, lawlessness, lack of work ethic, magical thinking, illiteracy, and humility in facing the outside world). Given that most of the descriptions supporting such portrait, although not impossible, seem rather unlikely from the position of a native of Portugal, the author ends up by performing a *fictionalized exotification of otherness*.

The present(ific)ation of the past / intemporalization of otherness are a case of a more general attitude, that of the *metonymical approach to otherness*, that is, the inclusion in otherness of elements which are connected to it only through metonymy, as opposed to a causal or metaphorical relation. The first form of the aestheticization of the social (considering individuals/concrete situations as representative of the social without paying attention to the epistemological validity of such operation) is also a case of metonymical approach to otherness, particularly of the *synedochal approach to otherness* as the concrete is gazed at as accounting for a whole. Showing how authors can be multiple in their relations with the other, Miranda France presents to a very significant extent of her text a *synedochal fictionalization of otherness*, by inserting the novel *Don Quixote* in otherness because it was produced and is set in “Spain”.

Finally in what regards the modes of relation and reaction to otherness, Cela is unique in his instances of *patronization of otherness* (“Don't call me Sir”, section 4.10); by playing with

⁵¹⁴ In this course one can also conceive of nostalgia for the future, that is, for the perfect society (say, based on advanced technology) which one knows will not experience.

knowledge and even fostering ambiguity as to the status of his work between fiction and non-fiction, he engages in *epistemological disregard for otherness*.

The ideal relation to otherness

Besides being indicators of writer's attitudes and readers' desires, some modes of relation and reaction to otherness identified in this study could be the basis of the construction of an ideal or at least recommended approach, aiming at avoiding some epistemological issues in the representation of otherness and destined to those writing and for those reading about it. Apart from the importance of not falling prey of nostalgia and accepting hybridism as constitutive of almost all societies (criticisms made to some anthologists and sociologists, as per section 5.3), this would apply mostly to non-scientist visitors.

To go as a tourist would be the less desirable option as in such case the contact with otherness is most likely to be framed by mediators (either locals or outsiders) whose main goal is profit and who (hence) do not care much with the fairness of the (re)presentation of a culture or society. Also, it is likely that the observer effect transforms the very practices tourist expect to see in the first place, by inducing their adaptation to the (supposed) visitors preferences or outright invention, although this issue is complicated by Cohen's (1988) notion of emergent authenticity, in which such adaptations or inventions end up by becoming authentic from the point of view of locals (section on authenticity above)⁵¹⁵.

To go independently alone or in small groups would seem, then, a better option.⁵¹⁶ To avoid Stewart's narrow renderization of the experience – which limits the portrait of the otherness only to a low degree of generality – the visitor would gather indirect information about the otherness before departing (similarly to an anthropologist doing a literature review prior to field work). This would reduce the probability of misleading generalizations from single cases and would more easily allow the identification of (more) representative cases and themes which otherwise might be left unnoticed. Consequently, it would allow for a strong(er) epistemological

⁵¹⁵ There is always the possibility of no relation to otherness, as in Cohen (2004) recreational tourist, (e.g. in going to a tourist resort without interest on local culture). In such a case the present recommendations are not relevant, of course.

⁵¹⁶ As seen in this study, traveller writers visibly search for knowledge, while tourists do not act in such a way. Also (and possibly because of that), travellers show more epistemological depth than tourists.

premeditation of the contacts with the otherness and increased epistemological depth, including a higher level of ethnographication of otherness.⁵¹⁷

In the migrant version of the ideal relationship to otherness, people would generalize based on more epistemologically favourable conditions, as they would have to earn a living within otherness in circumstances similar to those faced by locals and/or the duration of their experience would allow them to better generalize. If sufficiently unprejudiced not to rely on their first impressions and open to change their views according to their lasting experience and the indirect information they might actively sought, the law of large numbers would make them less prone to perform biased generalization vis-à-vis the occasional observations of the traveller. The duration the prescribed sojourn within the otherness could be longer than the minimum two-year observation period prescribed for the anthropologist (Sardan, 1995:74), even amounting to a lifetime.⁵¹⁸

In a variation of the former option – the insider version of the ideal relationship to otherness – the observer would direct the fascination for otherness – as noted by Botton (2002) or as captured by Mills's (1959) sociological imagination (section 5.5) – into his own culture, that is, the society in which he or her was born, socialized and/or lived for a long time.⁵¹⁹ Such approach of participant observation by an insider may be more seamless, as informants would be playing their role without being aware of it (no observer effect), while the insider could be a self-informer. (It should be noted that this theory of Insiderism has been criticized in its application in the practice of social science⁵²⁰.)

Arguably, the main advantage would not come from the possibility that the insider has a superior epistemological capacity to grasp her/his own culture; rather, it would rest mostly in

⁵¹⁷ This is not to say that atypical cases have no epistemological value, as they are of course used as a way to shed light on typical phenomena (namely, in terms of causality) in social science. It is considered, though, that we are dealing with the otherness here at the level of portrait – as seen above in this study description is overwhelming in the corpus against other forms of knowledge – more than at the level of explanation.

⁵¹⁸ One can see here, for example, the memories of a foreign correspondent (such as *Chinese Lessons: Five Classmates and the Story of the New China*, by John Pomfret) mingling indirect information (usually gathered professionally) with information provided indirectly, including that provided by informers (both gathered professionally and personally within friendship relationships).

⁵¹⁹ The notion of insider and culture/society here is taken broadly (say, at nation level). As Merton (1972) notes every individual has a set of status, being both insider and outsider depending on the status considered.

⁵²⁰ The argument sustains that if only members of a group can construct valid studies and representations of such group, then the same applies to subgroups and, ultimately, each individual can only be studied and represented by herself/himself (Merton, 1972). (This is, of course, an important counterargument to the postmodern ethnography, where voices of locals are given much pre-eminence.) Moreover, the status of stranger can lead informers to reveal aspects of their lives/culture which otherwise be hidden from the observer (Simmel's(1950) stranger would seem to fit this possibility).

other attitudes it would avoid and prompt on such observer. By not dealing with an “other”, s/he would tend to reduce prejudice and at the same time the anxiety of prejudice, which may cause excessive sympathy towards the other. An insider relationship in such conditions would tend to avoid the romanticism of the exotic (often arising from the mere conscience of geographical distance) and the allure of travel’s promise of transcending mediation (often derived from the conscience of being “abroad”). It would also possibly diminish the presence of the spurious inclusion in representations of the present(ific)ation of the past⁵²¹ (in case of a writer but also of the general public, one can conceive) and the second form of the aestheticization of the social, along with the (often) abusive generalization of the first form. By improving the probability that the observer would abstain from engaging in such idealization of the social, such move away from poetry would probably be more than compensated by more faithful representations, a right of the individual which should (and would, therefore) be extended to groups.

⁵²¹ As seen in this study, migrants are the only authors not engaging in such pattern.

Chapter 6 – Conclusion

This study departed significantly from most scholar analysis of the so called travel writing. First, it concluded that it would be more appropriately named factual literature on otherness, given under the label “travel writing” are usually included many works where travel is not fundamental. Second, it was one of the very rare sociological approaches dealing with the genre. This was true both in institutional terms (no other work of the kind was identified within the field) and as regards methodology (other than Sharp (1999), interestingly outside the field, no consistent use of sociological concepts was found). Third, it adopted a systematic, quantitative approach (albeit also a qualitative one) where the quantification process is made explicit.

Quantification also differentiated the approach of this study from above-mentioned Sharp (1999) (which is qualitative) and its use tried to overcome widespread issues found in academic studies of factual literature on otherness. This includes the vague / common sense nature of terminology and concepts and the problem of implicit quantification, that is, the presence of words or expressions conveying quantity without actual figures being quoted, suggesting quantification without exhaustive categorizing or counting. Thus, in the presentation of the quantification method, subjectivity was made more clearly visible.

Albeit resorting frequently to sociological concepts and concepts in related areas such as anthropology and tourism, this work can be seen as multidisciplinary. It considered as working hypotheses contributions from several domains of academic literature, including humanities / literary studies, cultural studies and postcolonial studies. The analysis was based on a minimal sociological notion of the reader as an individual who is part of a Western, modern, reflexive society. It also made use of the pact of factual reading with which such reader was presupposed to receive factual literature on otherness – that is, taking the texts as mostly non-fictional, sincere accounts of personal experiences. An important consequence of such methodology was the outline of images and patterns contained in the corpus. This was done both from the more limited point of view of reader (which was called the external perspective) and from the deeper and more encompassing point of view of the researcher (internal perspective). The distinction was based on the assumption that the reader reads factual literature on otherness mostly as a leisure activity in contrast with the systematic approach of the researcher.

No quantitative forays were made into trying to explain such images and patterns in terms of the social origins of the authors, albeit, as is noted below, differences were found and suggestions made in this regard. The theory of reflection was *a priori* rejected as a course of investigation. This was based on the assumption that the influence of social structure on a producer of discourse such as a writer is rather prone to be diluted by several factors. First, there is the “black box” of human agency (in the sense of personality as the influence of past accumulated personal experiences not specifically related to social/cultural extraction). Second, there is the very unpredictability of human behaviour; or, specific to the writer, a supposedly enhanced capacity to reflect. Instead of looking for such type of causality, it was supposed that due to the pact of factual reading, factual literature on otherness is more strongly influenced by the social structure observed within otherness and by the circumstances under which such observation takes place.

A critical analysis of the literature on travel writing, tourism and related studies was performed to construct the figure of the traveller (writer) in contrast to that of the tourist and the migrant (writers). Such review, along with the efforts to apply to the corpus at hand the triple typology pointed to conceptual limitations in some propositions in the area. These limitations included MacCannell (1999(1976), Urry (1990) and Leitch (2009), due either to inconsistency with empirical data or impossibility of empirical testing. A new, multidimensional definition of tourist attraction (and, consequently of tourist), along with those of traveller and migrant was therefore proposed and applied to compare the circumstances of the contact of the authors with otherness and the results of such contact in terms of their writing.

Texts were read based on the fundamental empirical unit the image of the social world. The systematic, quantitative nature of the approach was achieved by categorizing, on one hand, each image of the social world as regards structural dimensions (degree of generality; forms of knowledge it amounts to; and, resorting to the pact of factual reading, its likely sources). On the other hand, each image of the social world was categorized in a theme and considered also in terms of its inclusion in the pairs traditional / modern society. The fundamental difference / similarity ascribed to otherness (the latter pair with connections with the pair humanism / cultural relativism) was another dimension used.

Quantitative comparisons were thus made possible between the different texts of the corpus and also within each of the texts. Specifically, indicators were built considering the density of

variables. This means that not only the absolute number of images of the social world was deemed relevant, but also how such number compares with the total length of the text to which the images belong. Within-work relevance (say, the percentage of images of the social world assuming the form “explanation” in the total number of images) and extension (considering the degree of generality of the images) were also worked out. The combination of density, within-work relevance and extension produced composite indicators useful to confirm results previously found in terms of each of such comprising elements or to overcome inconsistencies between them.

In as much as the corpus may be representative of the universe of the contemporary factual literature in book form on Portugal and Spain (this is true at least for Portugal, as in this case the sample corresponded with the universe by the time the study was performed) the quantitative content results provided a general portrayal of the portraits each author made of these countries. This study has thus consolidated a general, systematic view of an important set of representations that circulate amongst readers, influencing their visions, attitudes and behaviours, with possible political and certainly economic consequences, in particular in tourism. At least as regards factual literature on otherness in the book form this is a novel approach; possibly it is also so as to literature in general.⁵²²

It is thus that policy making (mostly in what regards country image promotion) might want to pay attention to the fact that in the corpus the Iberian Peninsula is mostly presented as premodern (with Spain appearing less so) and suffering from insufficiencies in material terms (Portugal more so). Also, both countries are portrayed in negative terms – with Spain showing up more intensely in this regard, albeit the difference is reversed upon excluding author Franck Arencibia (whose *Spain: Paradox of Values/Contrasts of Confusion* work was shown to contain prejudiced rhetorical mechanisms)⁵²³. Public efforts to make the most of these depictions could perhaps draw on social science to counter the images of material insufficiency and negativeness. The same could be performed with the image of lack of social cohesion (in the case of Spain) – highlighting, for example, that a “very high human development” has been ascribed to each of the

⁵²² According to Hoover (2008), “quantitative approaches [to literature] are most naturally associated with questions of authorship and style, but they can also be used to investigate larger interpretive issues like plot, theme, genre, period, tone, and modality.

⁵²³ It should be noted that although it considers cases of themes that maybe generally seen as undisputedly positive or negative, the negativeness (/positiveness) index of the images of the social world does not consider the intensity of each image of the social world. This important methodological limitation must be taken into account when interpreting results in terms of negativeness.

countries for last three decades by the UN's Human Development Index. Notwithstanding, if the objective is to promote tourism (rather than attracting foreign investment) the best strategy may be to emphasize the general similarity between the portraits produced by these authors and those produced by social science, which holds that traditional cultural, political and institutional influences persist in Southern Europe. Here, it should be noted that the above-mentioned results of the study are averages, being therefore influenced by extreme values such as those of the mentioned Arencibia, so that the specific sections on each author (chapter 4) may also be important in this regard.⁵²⁴

The quantitative approach also shed a new light over issues much favoured by non sociological academic areas (mostly postcolonial studies) that study Western factual literature on otherness. In dealing with prejudice towards the other, cultural domination and/or cultural paternalism, they mostly read the content of texts in qualitative terms, searching for instances of such attitudes, and therefore risk only finding what is sought (or, more technically, sampling on the dependent variable). Trying to overcome this limitation, the present study added to such methodology a quantitative, exhaustive, comparative approach to *content* – that is, considering images of prejudice but also images contrary to those, and noting also the within-work relevance of those images as well as their relevance as compared to other authors. Moreover, it also performed a similar approach to *structure* – that is, considering how images are presented in terms of the forms and themes they assume and the sources that likely underlie them. The quantitative approach (in general and mostly in the case of structural analysis) presents the additional potential of finding patterns invisible to the external perspective of the leisure (and non-systematic) reading. Moreover, if writers can be expected to purposely avoid engaging in obvious ways in unfashionable or politically incorrect instances of prejudice towards the other, some of their underlying attitudes in such regard may be highlighted through, e.g., inconsistencies between proclamations of principles and systematic textual practices.

Specifically, the methodology allowed for a richer approach on the existence in the corpus of a contemporary version of the so-called Southernism, that is, the unfair textual treatment of Southern Europe, tending to reduce it to a premodern condition in much the same way as the Orientalist prejudice did with the countries of the Orient. Under this approach, it was found that

⁵²⁴ Were not for the fact that Franck Arencibia's *Spain* is a self-published work and, consequently, with limited audience, Spanish authorities may want to make a public rebuke on it based on what is argued in the present study.

the Anglo-Saxon authors of the corpus present the countries of the Iberian Peninsula as more negative relative to Spanish authors. At the same time, they note absence of rationality with higher intensity than the latter and see Portugal and Spain as relatively more premodern. Such results sustaining the thesis of Southernism were reinforced, now on the purely structural side, by the lower use of mediation by Anglo-Saxons. Further, by considering the exogenous variable *condition of the visitor* it was found that migrant writers – all Anglo-Saxons – do not show up as particularly positive towards otherness in their epistemological processes. This suggests that being an Anglo-Saxon has the strong effect of counterbalancing the expected positive approach of the migrant as regards otherness, given they are by definition more immersed in it.

Highlighting the importance the above described multilayered methodology, the case for the existence of Southernism was mitigated by the fact that epistemological empathy, a structural indicator of prejudice that considers the forms of knowledge used by authors, found no correlation with any of the two groups (Spaniards and Anglo-Saxons). This increases the likelihood of a theoretical argument presented on the literature review (page 104) which could partially account for more intense negative views of otherness by authors coming from (materially) more advanced societies. If one assumes that they have a predisposition to focus more on difference than on building an “objective” portrait, prejudice would need not be the (sole) cause of a negative view of an otherness. A similar mechanism could at work through the fascination with the premodern condition, an important tendency found in the corpus, and one should remember (as noted above) that contemporary academic research – including that originating from Southern Europe – holds, together with the Anglo-Saxons, that traditional influences persist in the region.

More generally containing the critique of postcolonial studies, the present study also showed that dominations and/or impositions so often noted and criticized by such analyses of travel writing and factual literature on otherness need not necessarily be of a *cultural* nature. The obvious possibility that social class may be relevant here is often forgotten. As seen in section 4.10, author-character Camilo Jose Cela (author of *Nuevo viaje a la Alcarría*, or *New Journey to the Alcarría*) bears his weight of super-star in a patronizing way on the Alcarría region. The culture of the region is generally presented as that of himself, as suggested by the fact that he uses the people he finds on the way to enact the Spanish language in the epistemologically void his *Alcarría dialogues*. Such observation points to alternative avenues of research where other

mainstream sociological variables such as class position or educational capital should be considered as sources of imbalances between the usually privileged position of writers vis-à-vis otherness (and, generally, vis-à-vis most individuals of any culture). Among such sociological variables, this work found no significant relevance in gender as a possible cause for differences amongst authors' writings. Similarly, the circumstances of the contact of authors with otherness – their condition as tourists, travellers or migrants – did not show up a clearly relevant as possible cause, albeit the expected superiority of travellers relative to tourists in terms of epistemological depth was observed.

The analysis performed in this study also proved fruitful in showing how the impressionistic, non quantitative approach based on anecdotal evidence followed by humanities can be incomplete and misleading in issues other than (neo-)colonialism. For example, if it had not been approached in a systematic, exhaustive way, Datus Proper's *The Last Old place – A Search Through Portugal* probably possibly would have been read quite differently, with the highlight on an author travelling with a local friend presented at inception as an informant. Under such approach Proper would have been considered as hearer of local voices, without regard for the fact that he ranks sixth amongst the nine works in terms of density of use of informants, reaching only 60% of the average of the corpus.

A second type of otherwise invisible inconsistency between an author's proclaimed intentions or principles and his actual textual behaviour was observed in Camilo Jose Cela's work. On one side, epistemological self-destruction, along with an ambiguous location between fiction and non fiction was noted (by resort to qualitative reading) in opposition to the most nostalgic excerpt of the corpus (the “endearing creatures” and the “true History of Spain which nobody will ever write”). On the other side, his work was found to contain the highest density of images of the social world in the corpus, along with an outstanding leading position in terms of the relevance given to the pair tradition/modernity.

In the same vein, it was also established on quantitative grounds that author Richard Hewitt (*Uma casa em Portugal*, or a *A Cottage in Portugal*) did not respect the pact of factual reading of the genre in terms of content. This is because from the position of a native of Portugal (as is the case of the author of this study) some of his descriptions, although not impossible, look rather unlikely. Albeit an impressionistic critical reading could have established this, here too the systematic analysis provided an additional structural insight, as Hewitt was found violating the

pact by going textually beyond his experience and possible sourcing of information within otherness. A practical implication of such highlighting of the violation the pact of factual reading is that authors who become aware of the possibility their works are scrutinized in such a way might in the first place refrain from such behaviour. That would be most important from the point of view of this work, which argued about the perils of using the label non-fiction to pass fictional textual elements as actual ones.

Parallel to the issue of sincerity in the accounts of otherness, this study dealt with the concepts of authenticity present in those accounts. Here, the quantitative analysis showed that on the corpus as a whole, images of traditional society tend to be more associated with the personal experience of the writer, while modern society associates more with the voices of individuals within otherness. Locals seem, then, more prone to take for granted the premodern and are more interested in (talking about) grand narratives of “progress”. On the other hand, authors apparently fall prey to nostalgia in the sense of the attitude that seeks to or finds authenticity in the past – as seen in the literature review, the fascination with traditional society is a fascination with what is supposed as the “good, old, real times”. An argument was also made, however, that a predisposition for searching difference within otherness may prompt authors to focus on premodern traits even when they are not moved by a nostalgic mood of such kind (in much the same way as the above presented argument that the focus on difference may result in negative views).

A pattern was also observed amongst non-migrant authors of the corpus consisting of parts of text conveying historical information about a place with no apparent reason other the author being there, no causal relation existing to the present which the visitor experiences. Amongst the possible accounts for such pattern – named the present(ific)ation of the past – is the ready-availability of History for writers, and the past functioning as a door to (a search for) authenticity (namely that of traditional society, the appeal of which was discussed above). Explanatory room was also found for non nostalgic-based explanations of the appeal of the pattern: the past may represent safety as it is by definition completed, not prone to transformation (at least for the non-professional historian). To this it was added its insubstantiality, making ultimately unreachable and impossible to consume directly, the reason why its charm can be taken as paradoxically non-competitive in the satisfaction a romantic desire for positional goods (that is, one can consume the past as if no one else were consuming it, mostly when reading about it).

On the other hand, more than being made of social forces, the past present(ified) by the non-migrant authors showed up as made of individuals, such as kings, great politicians or common people who took noble, heroic actions. Grand History was thus seen as producing nostalgic authenticity in the sense of agency overcoming social structure and even chance (forgetting that in many cases events might easily have developed differently). Further, in the quest for the past there can be also nostalgia for a kind of apolitical safe haven in the sense that struggles for power in “old times” do not directly affect contemporary life, their violent nature being ignored. In turn, the premodern form of the past, which covers most of historical time, is also authentic in being precapitalist, or at least in its non mass production nature. Finally, it should not be forgotten that it is not possible to establish market relations (another source of perceived inauthenticity), with people who are now part of History.

Another pattern identified by this study was the aestheticization of the social, assuming two forms. In a first form it consists in considering each individual person, thing or activity in terms of its representativeness/symbolism of a community/society/culture with a higher level of generality, while ignoring the issue of the validity of the epistemological process linking the lower and the higher levels of generality. In the second form, there is a direct focus on the social in its generality, in this case with no intent in the production of relevant knowledge.⁵²⁵ This pattern was also proposed as a way of searching for authenticity, a possibility that could help to fill a seeming gap in MacCannell’s theory, which holds tourists are trying to escape modernity in the face of the fact that they mostly visit modern societies. The aestheticization of the social being a possible way through which people are interested (as well) in their own societies or cultures, it would also help explaining why FLO includes various works focusing on the home country of their authors and why there are many cases of FLO books achieving major sales in the country which they deal with.

In analogy with the notion of tourist sight, the aestheticization of the social rendered the concept of *social sight*, which is constantly being (re)created either at home or abroad in a drive for whole(some)ness. In the social sight a social entity or a social situation is seen from afar in the perspective of its entirety. It arises to the imagination as an integrated system in its complete set of relationships, in opposition to the closed, fragmented, concrete experience of society made

⁵²⁵ This second form is characteristic of the guidebook and it can be identified empirically through the concept of the *image in a domain of the social world*, proposed in this study.

of fears, frustrations, limitations and incongruities one has of within one's own everyday life⁵²⁶ (There are, of course, possibilities and positive feelings associated with society).

In this context it was argued that the factual literature on otherness is especially well suited for a (highly sanitized) enactment of the aestheticization of the social. As shown regarding the corpus, this pattern was enacted by writers themselves and, at the same time, could be present in the reception, by the reader, of images as social sights by taking accounts of parts of a whole (a city, a country, a region) as representative of that whole. In addition, the usually solitary act of reading would temporarily separate the reader from the society which surrounds her or him and offer a backstage where s/he feels free from social constraints to gaze at an otherness that, shown in a mediated form, cannot possibly be influenced by her/him. This would reach the distanced, ultimate romantic gaze *à la* Urry (1990), and feed the "romantic desire for positional goods" (Walter, 1982:303) (an effect also possible in the present(ifica)tion of past).

By noting both the presence of the present(ifica)tion of past and the aestheticization of the social in the corpus, factual literature on otherness was seen as accounting for the designation of a physical space/society/culture (e.g. "Portugal") in a most complete manner. This is because it covers the two temporal dimensions of *what was* and *what is* (which in some cases, as seen, are conflated). It was argued that each of these dimensions tends to specialize in one of the extremes of a major sociological dualism (or duality). The contemporary of the aestheticization of the social aims at social structure and/or culture (even in its first form, because despite departing from the concrete it arrives at the general) and is a major source of fascination with sameness. On the other hand, the past of the present(ifica)tion process renders the strength of agency through great historical figures such as holders of great power (e.g. Kings) or heroes (e.g. revolutionaries) which are shown as acting to a great extent independently of social constraints.

More generally, several modes of relation to otherness were identified in the corpus, a complex framework with no clear clusters of authors and comprising different possibilities of

⁵²⁶ The author of this study remembers hearing in his childhood a description of his father trying to get a ride in a French motorway and of that being impossible because all vehicles were fully loaded with families and their luggage running south to the Côte d'Azur. Until some (recent) more serious reflection on the matter, the author imagined those ephemeral figures passing on the motorway as fully representing utopian, perfect, families – nonetheless because they were foreign. Such view ignored of course, say, traffic jams or the disagreements, to say the least, so common within vehicles carrying families in long journeys in any part of the world. Such view forgot the author's own experience – how he would get bored in the journey south (in our case, to the Algarve), how he would fight for space with his brother in the backseats, and how his own father would be enraged about having to make an unforeseen stop for the boys to go to toilet when they had clearly been warned during the previous stop that they should take the opportunity to do so.

associating authors depending on the dimensions considered. Based on those modes, an ideal relation to otherness was proposed aiming at avoiding some epistemological issues in the representation of otherness and destined to those visiting and representing it. In this context, to go as a tourist would be the less desirable option, while going independently alone or in small groups would be preferable. The ideal would be to relate to otherness as migrant, especially in the insider version, in which the observer directs the fascination for otherness into the society in which he or her was born, socialized and/or has lived for a long time. Given such observer would not be dealing with the “other”, s/he would tend to reduce prejudice and at the same time the anxiety of prejudice (which may cause, in turn, excessive sympathy towards the other). All in all, the insider relationship would eliminate the romanticism arising from the notion of the exotic (often due to the mere fact of geographical distance or the conscience of being “abroad”) and it would more easily guarantee that the insider abstained from engaging in the idealization of the social in the various forms presented above.

As regards the textual rendering of the relation with otherness, the violation of the pact of factual reading (as shown by Hewitt) and the ambiguity as to the fictionality of a work (as in Cela) would of course not to be recommended at all. Given the potential of travel writing and, more generally, of the factual literature on otherness, to participate in the formation of representations via their status as sincere representations, an author should up to some point be responsible for consistency in such regard (an argument which was extended to the historical novel). Such move away from poetry will probably be more than compensated by a more faithful representation, a right of the individual which would therefore be extended to groups.

Given this, a last conclusion is that social science should pay more attention to the social construction of reality through factual literature on otherness (and other media of representation presenting themselves as non fictional, with the methodology having possible applications also to the realm of the fictional). Besides the avenues of research suggested above, it might be interesting to apply the quantitative processes here used to a greater number of works. This would increase the representativeness of the sample (a possible limitation of the present study as regards only Spain, as in the case of Portugal the sample corresponded with the universe by the time the study was performed). Finally, it may prove fruitful to survey readers and tourists more often on the issues of the search for authenticity, nostalgia, aestheticization of the social and the representations they perceive through factual literature on otherness (and other forms of

rendering the social), to help settling empirically discussions in such regards often too limited to theory.

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Annex A – The implicit quantification of literary studies on TW and FLO

As of May, 25th 2011, Pratt (2008(1992)) (4,324 quotations) was the most quoted work in Google scholar when a search on “TW” was performed; not so much quoted (1,668 quotations) Said's *Orientalism* (1978) is nonetheless widely recognized as a classic in the area. Despite figures being almost absolutely absent in *Orientalism*, one finds 12 cases of the use of the expression “often” to denote quantity in reference to authors and/or texts being analysed⁵²⁷, the total number of cases of “often” irrespective of the intended denotation being 56 (Table A.1, below). A similar pattern is found in Pratt's (2008(1992)) *Imperial Eyes*⁵²⁸.

As the examples in the above footnotes illustrate, these words and expressions are not always used to convey quantity. Besides, in some cases they may be quotations of the actual works under analysis; they can be part of questions (“how often...?”); and there may be other cases that justify their exclusion for this counting. There are, therefore, grounds for taking these figures as an exaggeration of the supposed phenomenon of implicit quantification. However, even allowing for a great reduction in these figures, say to half, one still finds more than one implicit quantification every two pages. Even if the threshold is lowered to as less as 10%, one still finds 42 cases in *Orientalism* and 34 cases in *Imperial Eyes*.

⁵²⁷ “...as early as Aeschylus’s play *The Persian: the Orient* is transformed from a very far distant and often threatening Otherness into figures that are relatively familiar (in Aeschylus’s case, grieving Asiatic women).” (page 21); “Such comparatism is rarely descriptive; most often, it is both evaluative and expository. Here is Renan comparing typically:” (page 149); “Most often an individual entered the profession [of Orientalist] as a way of reckoning with the Orient’s claim on him; yet most often too his Orientalist training...” (page 150); “...neither Tasso nor Chateaubriand (whose antecedent travels seem often to harass Lamartine’s otherwise heedless egoism) get the Holy Land right...” (page 178); “...even if there is often a quality of disappointment, disenchantment, or demystification to be found in their Oriental writings.” (page 181); “everything about it [the Orient] is presented to us by way of Burton’s knowledgeable (and often prurient) interventions” (page 196); “a particularly charged period in the latter part of the century, when the often dilatory, abstract, and projective aspects of Orientalism...” (page 205); “In the classical and often temporally remote form in which it was reconstructed by the Orientalist, in the precisely actual form in which the modern Orient was lived in, studied, or imagined, the geographical space of the Orient was...” (page 211); “Massignon’s considerable literary gifts sometimes give his scholarly work an appearance of capricious, overly cosmopolitan, and often private I speculation.” (page 267); “1. *Popular images and social science representations*. Here are a few examples of how the Arab is often represented today.” (page 285); “Slave trader, camel driver, moneychanger, colourful scoundrel: these are some traditional Arab roles in the cinema. The Arab leader (of marauders, pirates, “native” insurgents) can often be seen snarling at the captured Western hero and the blond girl...” (page 287); “His style, which bore often chaotic evidence of his Austro-Germanic polymathy, of his absorption of the canonical pseudoscientific prejudices of French, British, and Italian Orientalism...” (page 296);
⁵²⁸ Possible examples would be “Initially in this account the voice of the scientist predominates”, referring to a voyage to Peru by a French mathematician (page 18); “Khoikhoi persons are often quoted...” (page 43); “she quotes a lot” (221), but others could be chosen.

Table A.1 – Frequency of some words and expressions conveying quantity in Edward Said's *Orientalism*⁵²⁹ and Mary Louise Pratt's *Imperial Eyes: Travel Writing and Transculturation*⁵³⁰

| <i>Orientalism</i> | | <i>Imperial eyes</i> | |
|--------------------------|------------------|--------------------------|------------------|
| word / expression | Frequency | word / expression | frequency |
| many | 96 | many | 87 |
| very much | 68 | often | 82 |
| large | 59 | few | 41 |
| often | 56 | very much | 30 |
| few | 37 | mainly | 23 |
| sometimes | 26 | large | 22 |
| mainly | 23 | sometimes | 16 |
| frequently | 17 | repeatedly | 11 |
| rarely | 12 | a lot | 8 |
| constantly | 9 | frequently | 7 |
| typically | 8 | chiefly | 5 |
| occasionally | 4 | greatly | 4 |
| repeatedly | 3 | constantly | 3 |
| a lot | 3 | rarely | 3 |
| mostly | 3 | typically | 3 |
| greatly | 2 | occasionally | 2 |
| chiefly | 1 | mostly | 1 |
| Total | 427 | | 348 |
| number of pages | 368 | | 276 |
| total per page | 1.16 | | 1.26 |

⁵²⁹ The 1st Vintage Books English edition (1979) was used for counting, although elsewhere quotations from the book refer to the original 1978 edition.

⁵³⁰ In both cases, the counting was performed using “Look inside” feature in amazon.com.

Annex B – Description of statistical results

B.1 – Absolute quantity and density of images of the social world

Following the methodological definition presented in chapter 3, 1,294 images of the social world were identified in the corpus (the figure does not include 13 *images in the domain of* as explained there). Their distribution amongst works is sorted by the percentage of the average density of each work on the table below, which considers the density of images to account for the effect of the different book extensions.

Table B.1 – Number and density of images of the social world

| Work | Images | Words | Images per 1,000 words | % of the average* |
|--|---------------|--------------|-------------------------------|--------------------------|
| <i>Nuevo viaje a la Alcarría</i> / Camilo Jose Cela | 175 | 67,491 | 2.59 | 143 |
| <i>Don Quixote's Delusions: Travels in Castilian Spain</i> / Miranda France | 194 | 76,839 | 2.52 | 139 |
| <i>Trás-os-Montes: uma viagem portuguesa</i> / Julio Llamazares | 145 | 67,706 | 2.14 | 118 |
| <i>Paradox of Values / Contrasts of Confusion</i> / Frank A. Arencibia | 206 | 100,584 | 2.05 | 113 |
| <i>The last old place: A search through Portugal</i> / Datus C. Proper | 144 | 74,139 | 1.94 | 107 |
| <i>Backwards Out of the Big World: Voyage into Portugal</i> / Paul Hyland | 151 | 98,159 | 1.54 | 85 |
| <i>Driving Over Lemons: An Optimist in Andalucía</i> / Chris Stewart | 108 | 76,165 | 1.42 | 78 |
| <i>Uma Casa em Portugal</i> / Richard Hewitt | 97 | 76,524 | 1.27 | 70 |
| <i>It's not about the tapas: a Spanish adventure on two wheels</i> / Polly Evans | 74 | 86,629 | 0.85 | 47 |
| Standard deviation | | | 0.59 | |
| standard deviation / average | | | 0.32 | |
| average | 100 | 100 | 1.81 | 100 |
| average for travellers | 171 | 80 | 2.15 | 118 |
| average for migrants | 147 | 80 | 1.87 | 103 |
| average for tourists | 86 | 82 | 1.06 | 59 |

As can be seen, there are important differences within the corpus in this regard. The standard deviation in relation to the average is 32% and the image density ranges from 47% to

143% of the average⁵³¹. Three groups can be identified: four works close to the average, that is, a deviation no greater than 20% in relation to the average (*Trás-os-Montes: uma viagem portuguesa*; *Paradox of Values / Contrasts of Confusion*; *The last old place: A search through Portugal*; *Backwards Out of the Big World: Voyage into Portugal*); two works significantly above the average (*Nuevo viaje a la Alcarria* and *Don Quixote's Delusions*) and three works below the average (*Driving Over Lemons*, *Uma casa em Portugal* and *It's not about the tapas*).

A first conclusion is the absence of a correlation between image density and the typology tourist-traveller-migrant: none of the groups with similar densities matches such typology. The fact that sedentary works *Lemons* and *Casa* are below average and low in rank could suggest that sedentaries tend to see / register less of the social, but when one sees the sedentary (Arencibia) slightly over average this possible correlation loses strength. In addition, there is no correlation between the literary prestige / experience of authors and the depth of their gaze to the social world as measured by the density of images.⁵³²

Camilo Jose Cela, the author of the richest work in terms of images (*Nuevo viaje*) is the only one in the corpus with a command of the local language, but this single result does not allow us to suggest a correlation, something which applies henceforth between this characteristic of the author and other traits of his writing identified by the quantitative analysis. Cela, awarded the Nobel Prize for Literature three years after the publication of *Nuevo viaje* and a celebrity in the very travel which gave rise to the book, is also the most famous / professionalised writer in the corpus, but the fact that the self-published Frank A. Arencibia comes in mid rank, as noted above, precludes an association between literary prestige / degree of professionalization and density of images. Even if one ignores the latter on the grounds that the structure of his book is very different from all other works in the corpus (organization by topics, rather than chronologically and a higher level of generic claims about otherness, as it is shown below in Table B.2), one must note that he and the other two debutants in writing (Chris Stewart and Richard Hewitt), although at the bottom of the hierarchy, see Polly Evans, a journalist, below

⁵³¹ An alternative to the use of the percentage differences to the average would be to consider differences to the average in terms of standard deviations. The analysis of such statistic would be, however, possibly less transparent because it would seem more intuitive and less arguable to discuss if, say, a 20% difference is significant or not than to perform the same discussion for, say, two standard deviations. This reasoning and the resulting method applies elsewhere in this study.

⁵³² Henceforth, the links between an endogenous variable and these two exogenous dimensions (tourist-traveller-migrant and prestige / experience of authors) will only be commented in case correlations are identified.

in rank. Finally, gender does not show up as associated with the density of images, the same applying to epistemological premeditation.⁵³³

B.2 – Degrees of generality

The table below presents the average degree of generality for each work, calculated based on the degrees of generality attached to the corresponding images of the social world.⁵³⁴

Table B.2 - Generality per work

| work | average generality | % of the average |
|---------------------------------------|---------------------------|-------------------------|
| <i>Spain: Paradox of Values</i> | 2.90 | 140 |
| <i>Don Quixote's Delusions</i> | 2.49 | 120 |
| <i>It's not about the tapas</i> | 2.28 | 110 |
| <i>The last old place</i> | 2.16 | 104 |
| <i>Uma Casa em Portugal</i> | 2.05 | 99 |
| <i>Nuevo viaje a la Alcarria</i> | 1.85 | 89 |
| <i>Backwards Out of the Big World</i> | 1.80 | 87 |
| <i>Trás-os-Montes</i> | 1.69 | 82 |
| <i>Driving Over Lemons</i> | 1.40 | 68 |
| average | 2.07 | |
| standard deviation | 0.45 | |
| standard deviation / average | 0.22 | |

There is less dispersion in this case: the standard deviation in relation to the average (22%) is lower, with the percentage of the average ranging from 68% to 140%. *Paradox of Values* stands out 40% above the average, with an average value generality very close to 3, meaning it is overwhelmingly composed of images that refer to a whole (in this case, Spain). At 68% of the average, *Driving Over Lemons* is isolated at the opposite extreme, while all the other works are located within 20% of the average. These two extreme cases fit what would be expected of a book explicitly intending to convey an image of a country (*Spain*) and another whose author is

⁵³³ Henceforth, only the presence (not the inexistence) of correlations between results and the above-mentioned dimensions of exogenous circumstances of travel is mentioned.

⁵³⁴ It should be noted, therefore, that this is the degree of generality of the images of the social world, not an outright degree of generality of each work.

confined a considerably narrow physical space (*Lemons*). Such fitness does not obtain, however, for the remaining two cases where global knowledge about a country is also an explicit intention from the outset of the journey (*Last Old Place*⁵³⁵ and *Backwards*⁵³⁶) which are located in mid rank) neither from the other author (most of the time) confined to a narrow physical space (Richard Hewitt), who is located in mid rank. Finally, *Don Quixote's Delusions* and *It's not about the tapas*, both authored by women, show values above the average, opening the question of whether FLO by women is of a higher degree of generality than that by men.

B.3 – Density of extension of knowledge of the social

Table B.3 - Density of extension of knowledge of the social

| Work | sum of degrees of generality | of of knowledge the social | of of extension (density) as % of the average |
|------------------------------------|------------------------------|----------------------------|---|
| <i>Don Quixote's Delusions</i> | 483 | 63 | 166 |
| <i>Spain: Paradox of Values</i> | 598 | 59 | 157 |
| <i>Nuevo viaje a la Alcarría</i> | 324 | 48 | 127 |
| <i>The last old place</i> | 311 | 42 | 111 |
| <i>Trás-os-Montes</i> | 245 | 36 | 95 |
| <i>Backwards Out of the Big...</i> | 272 | 28 | 73 |
| <i>Uma Casa em Portugal</i> | 199 | 26 | 69 |
| <i>Driving Over Lemons</i> | 151 | 20 | 52 |
| <i>It's not about the tapas</i> | 169 | 20 | 51 |
| standard deviation | | 15.2 | |
| standard deviation / average | | 0.40 | |
| average | | 38 | |
| average for travellers | 389 | 48 | 126 |
| average for migrants | 276 | 35 | 93 |
| average for tourists | 184 | 23 | 60 |

As expected given its high level of generality, *Paradox of Values* moves into a higher position, but *Don Quixote's Delusions* also goes up, reaching the position of the most extended work in terms of knowledge. Despite being third in the rank of generality, *It's not about the tapas*

⁵³⁵ Note the title and subtitle – “A search through Portugal” – and this quote: “Adriano [(a Portuguese friend)] and I will therefore jump back and forth from now (...) to earlier times. We will do this repeatedly throughout our journey, because there is no other way to see the country.

⁵³⁶ I'm going upriver in the direction, as far as Alcántara in Spain, to find out where Portugal begins and ends. If it's lost its role and its riches, at least can be not-Spain. (page 10)

remains last (as in the images), given it is only slightly above the average in terms of generality and very much below in terms of density of images. Again, the two works (apart from *Paradox*) where global knowledge about a country is also an explicit intention are located in mid rank.

B.4 – Forms of knowledge of the social world⁵³⁷

As in the case of the number of images of the social world, the density of forms of knowledge is calculated to account for the effect of the differences in the extension of the books.

Table B.4 - Density of forms of knowledge (per 10,000 words)

(d = description; a = assessment; e = explanation; m = mediation and u = understanding)

| Work | d | a | m | e | u |
|---------------------------------------|----------|----------|----------|----------|----------|
| <i>Uma Casa em Portugal</i> | 7.1 | 1.2 | 1.6 | 0.9 | 0.3 |
| <i>Trás-os-Montes</i> | 17 | 0.7 | 1.2 | 0.4 | 0 |
| <i>Backwards Out of the Big World</i> | 9.8 | 2.1 | 2.4 | 0.1 | 0.1 |
| <i>The last old place</i> | 13.8 | 1.5 | 0.5 | 1.1 | 0.1 |
| <i>Driving Over Lemons</i> | 10.1 | 0.3 | 0.5 | 0 | 0.1 |
| <i>It's not about the tapas</i> | 5.7 | 0.3 | 0.1 | 1.4 | 0.2 |
| <i>Don Quixote's Delusions</i> | 12.5 | 1.7 | 5.1 | 2 | 0.7 |

For all the forms of knowledge except description, there is a very high variability amongst authors. As expected of travel books and works within the literature on otherness, description (almost 70% of the total density) is by far the most used form of knowledge, with mediation, assessment and explanation showing similar figures between themselves (7% to 12% of the total) and understanding being the least important form of knowledge (only 1.2%). Given important differences exist amongst authors in what regards the use of each form of knowledge, it is useful to calculate the density of forms of knowledge as percentage of the average of the corpus for each form of knowledge.

⁵³⁷ It should be noted that, for each work, the total number of forms of knowledge does not necessarily corresponds to the number of images of the social world, given that some of these generate more than one form of knowledge. There is, however, as expected, a strong correlation between the number of images of the social world and the total number of forms of knowledge per author, as per the section specifically dedicated to this matter in this same chapter, below. For this reason the number of forms of knowledge for each author is redundant and therefore not considered, the relevant indicator being the use of each form of knowledge vis-à-vis other authors and within authors (as considered below).

Table B.5 – Density of forms of knowledge of the social world (per 10,000 words) as percentage of the average of the corpus for each form

| Work | d | a | m | e | u |
|---------------------------------------|----------|----------|----------|----------|----------|
| <i>Uma Casa em Portugal</i> | 64 | 67 | 85 | 80 | 134 |
| <i>Trás-os-Montes</i> | 154 | 42 | 64 | 39 | 0 |
| <i>Backwards Out of the Big World</i> | 89 | 122 | 132 | 9 | 52 |
| <i>The last old place</i> | 125 | 84 | 29 | 94 | 69 |
| <i>Driving Over Lemons</i> | 92 | 15 | 28 | 0 | 67 |
| <i>It's not about the tapas</i> | 51 | 20 | 6 | 121 | 118 |
| <i>Don Quixote's Delusions</i> | 113 | 96 | 274 | 171 | 333 |
| <i>Spain: Paradox of Values</i> | 99 | 311 | 48 | 270 | 51 |
| <i>Nuevo viaje a la Alcarria</i> | 112 | 143 | 232 | 117 | 76 |
| average | 100 | 100 | 100 | 100 | 100 |
| average for travellers ¹ | 110 | 111 | 167 | 98 | 133 |
| average for migrants ² | 78 | 41 | 57 | 40 | 101 |
| average for tourists | 103 | 31 | 35 | 80 | 59 |
| | | | | | |
| average for Anglo-Saxons (a) | 90,4 | 102,1 | 86 | 106,4 | 117,7 |
| average for Spanish (b) | 133 | 92,5 | 148 | 78 | 38 |
| a / b | 0,68 | 1,104 | 0,581 | 1,364 | 3,097 |

1 – The averages for travellers, migrants, and tourists are calculated directly based on the percentages of the average (for comparative purposes this is the same as calculating them based directly on absolute values).

2 - Does not consider Arencibia given the sole use of average for migrants is to consider assessment and Arencibia is the heaviest user of assessment on the corpus, being excluded from these calculations on the grounds of his manifest prejudice (see section 4.9), which is considered as the underlying cause of most of his assessments.

Julio Llamazares is the heaviest user of description in density terms, roughly 50% above the average, followed by *The last old place* still significantly above the average. *It's not about the tapas* and *Uma casa em Portugal* are well behind the average, with the remaining works being close to average. In terms of assessment, there is much higher dispersion⁵³⁸. *Spain: Paradox of Values* clearly stands out as the most dense work (more than three times the average) and there is

⁵³⁸ It should be noted that the form of knowledge assessment can be performed by the author her or himself but also by other people, usually informants (the analysis of sources of the knowledge is carried out below). This distinction is grasped by the fact that in the latter case both the forms assessment and mediation are present, the reason why it is considered unnecessary to identify subtypes of assessment. Such difference is considered, for example, in the calculation of empathy index below, where both forms (and other) work as inputs.

a group (*Driving Over Lemons*, *It's not about the tapas*, *Uma Casa em Portugal* and *Trás-os-Montes*) with very low densities. The author of *Spain* is also the one who explains most, leaving clearly behind all other authors except Miranda France (*Don Quixote's Delusions*), who is the highest mediator, opposing Polly Evans's *It's not about the tapas*, where mediation is almost non-existent. Chris Stewart, the author of *Driving Over Lemons* does not explain at all and is very close in such regard to Paul Hyland's *Backwards Out of the Big World*.⁵³⁹

Besides considering the importance each author ascribes to each form of knowledge relative to the other authors, one can also consider, within each work, the importance of each form of knowledge relative to the other forms. The results can then be compared amongst the corpus to find different patterns of intra-work distribution of forms of knowledge. The next two tables present this perspective.

Table B.6 – Distribution of forms of knowledge within each book (%)

| Work | d | a | m | e | u | total | standard deviation | stand. dev. / average stand. dev. |
|----------------------------------|-------|------|-------|-------|------|-------|--------------------|-----------------------------------|
| <i>Uma Casa em Portugal</i> | 64.3 | 10.7 | 14.3 | 8.3 | 2.4 | 100 | 22.5 | 86.4 |
| <i>Trás-os-Montes</i> | 87.8 | 3.8 | 6.1 | 2.3 | 0 | 100 | 34.0 | 130.6 |
| <i>Backwards Out of ...</i> | 67.1 | 14.7 | 16.8 | 0.7 | 0.7 | 100 | 24.5 | 94.1 |
| <i>The last old place</i> | 81.0 | 8.7 | 3.2 | 6.3 | 0.8 | 100 | 30.6 | 117.5 |
| <i>Driving Over Lemons</i> | 91.7 | 2.4 | 4.8 | 0 | 1.2 | 100 | 35.9 | 137.9 |
| <i>It's not about the tapas</i> | 73.1 | 4.5 | 1.5 | 17.9 | 3 | 100 | 27.2 | 104.5 |
| <i>Don Quixote's Delusions</i> | 57.1 | 7.7 | 23.2 | 8.9 | 3 | 100 | 19.7 | 75.7 |
| <i>Spain: Paradox of Values</i> | 53.4 | 26.7 | 4.4 | 15 | 0.5 | 100 | 19.0 | 73 |
| <i>Nuevo viaje a la Alcarria</i> | 59.7 | 12.2 | 20.9 | 6.5 | 0.7 | 100 | 20.9 | 80.3 |
| average for Anglo-Saxons (a) | 69.7 | 10.8 | 9.7 | 8.2 | 1.7 | | | |
| average for Spanish (b) | 73.8 | 8 | 13.5 | 4.4 | 0.4 | | | |
| a / b | 0.944 | 1.35 | 0.719 | 1.864 | 4.25 | | | |

Description is, for all authors, the form of knowledge that occupies more text, ranging from a minimum just above 50% (*Spain: Paradox of Values*) to a maximum of 91% (*Driving Over Lemons*). Understanding is the less used form, with the remaining forms showing considerable variation amongst authors and *Spain* clearly leading in the percentage of text dedicated to

⁵³⁹ The comparison of the authors in terms of understanding is not significant as the absolute values of this form of knowledge are extremely low, ranging from zero to 5. Therefore, this form is not analysed henceforth.

assessment. The composite index below considers both the density of each form relative to the corpus and the intrawork weight of each form.

Table B.7 – Composite index of forms of knowledge (percentage of the average)

| Work | d | a | m | e | u |
|---------------------------------------|----------|----------|----------|----------|----------|
| <i>Uma Casa em Portugal</i> | 58 | 45 | 70 | 61 | 150 |
| <i>Trás-os-Montes</i> | 189 | 10 | 23 | 8 | 0 |
| <i>Backwards Out of the Big World</i> | 83 | 112 | 129 | 1 | 17 |
| <i>The last old place</i> | 141 | 46 | 5 | 55 | 26 |
| <i>Driving Over Lemons</i> | 118 | 2 | 8 | 0 | 38 |
| <i>It's not about the tapas</i> | 53 | 6 | 1 | 198 | 166 |
| <i>Don Quixote's Delusions</i> | 91 | 47 | 370 | 139 | 466 |
| <i>Spain: Paradox of Values</i> | 74 | 522 | 12 | 370 | 12 |
| <i>Nuevo viaje a la Alcarria</i> | 93 | 110 | 282 | 69 | 26 |
| average | 100 | 100 | 100 | 100 | 100 |
| average for travellers ¹ | 102 | 79 | 197 | 66 | 134 |
| average for migrants ² | 88 | 24 | 39 | 31 | 94 |
| average for tourists | 121 | 8 | 12 | 103 | 83 |
| | | | | | |
| average for Anglo-Saxons (a) | 88.3 | 111.4 | 85 | 117.7 | 125 |
| average for Spanish (b) | 141 | 60 | 152.5 | 38.5 | 13 |
| a / b | 0.626 | 1.857 | 0.557 | 3.057 | 9.615 |

1 – The averages average for travellers, migrants, and tourists are calculated directly on the percentages of the average (for comparative purposes this is the same as calculating them directly on absolute values).

2 - Does not considers Arencibia (some justification as in table B.5, above).

In composite terms, *Trás-os-Montes* stands out at almost 1.9 times the average in the case of description, followed by *The last old place*. At bottom, we find *It's not about the tapas*, *Uma Casa em Portugal* and *Spain: Paradox of Values*, with the remaining works close to the average. In what regards assessment, *Spain: Paradox of Values* leads by far (more than 5 times the average), with two works near the average (*Backwards Out of the Big World* and *Nuevo viaje a la Alcarria*) and all other works much below. *Don Quixote's Delusions* is the highest mediator followed by *Nuevo viaje a la Alcarria* and *Backwards*, all other authors much behind the average. Finally, Franck Arencibia (*Paradox*) is the author with the highest composite score,

followed by Polly Evans (*Tapas*) and Miranda France (*Delusions*), while the remaining authors are very low in explanation.⁵⁴⁰

Collective voice: a special case of mediation

In some cases an author conveys something akin to “hearsay” or “what people say” in a given area or within a given group⁵⁴¹. Table abaixo, shows the percentage of collective voices in the total number of mediations for each work.

Table B.8 - Mediation: % of collective voice

| Work | number of mediations | % of collective voices |
|---------------------------------------|-----------------------------|-------------------------------|
| <i>Uma Casa em Portugal</i> | 12 | 16.7 |
| <i>Trás-os-Montes</i> | 8 | 12.5 |
| <i>Backwards Out of the Big World</i> | 25 | 28.0 |
| <i>The last old place</i> | 4 | 0.0 |
| <i>Driving Over Lemons</i> | 4 | 0.0 |
| <i>It's not about the tapas</i> | 1 | 100.0 |
| <i>Don Quixote's Delusions</i> | 39 | 12.8 |
| <i>Spain: Paradox of Values</i> | 9 | 77.8 |
| <i>Nuevo viaje a la Alcarria</i> | 29 | 34.5 |
| Average | | 31.4 |
| standard deviation | | 34.9 |
| standard deviation / average | | 1.1 |

There is a very high relative variance amongst authors (standard deviation / average is 110%) and the number of mediations is generally low. Even excluding from the analysis the cases for which the number of mediations is lower than 5 the standard deviation / average is still very high, at 80%, as per next table.

⁵⁴⁰ As referred above in footnote 539, on page 280, understanding is not analysed given its irrelevance in absolute quantity and relative to the overall form density.

⁵⁴¹ This happens for example in Hyland (213: “A group of such [gypsy] women, the buzz goes, have stocked up at a supermarket and offered not money at the checkout but sharp knives...); France (100: “They [, the inhabitants of Castille,] are reputed, especially among other Spaniards, to be closed, braced against emotion as they might be against sun or wind.”); when an author informs the reader of the results of surveys where people are asked for opinion (several occasions) or, in Cela, when he refers to popular sayings and popular knowledge (in pages 33, 42, 48, 67, 76, 156, 157 and 177).

Table B.9 - Mediation: percentage of collective voice – selected cases

| Work | number of mediations | % of collective voices | % of collective voices as % of the average |
|------------------------------------|----------------------|------------------------|--|
| <i>Uma Casa em Portugal</i> | 12 | 16.7 | 50 |
| <i>Trás-os-Montes</i> | 8 | 12.5 | 40 |
| <i>Backwards Out of the Big...</i> | 25 | 28.0 | 90 |
| <i>Don Quixote's Delusions</i> | 39 | 12.8 | 40 |
| <i>Spain: Paradox of Values</i> | 9 | 77.8 | 260 |
| <i>Nuevo viaje a la Alcarría</i> | 29 | 34.5 | 110 |
| average | | 30.4 | |
| standard deviation | | 24.8 | |
| standard deviation / average | | 0.8 | |

Looking only at these selected cases, *Spain: Paradox of Values* clearly stands out at 2.6 the average, with *Nuevo viaje a la Alcarría* and *Backwards Out of the Big World* are close to the average and the remaining works roughly at half the average.

B.5 –Epistemological empathy towards otherness⁵⁴²

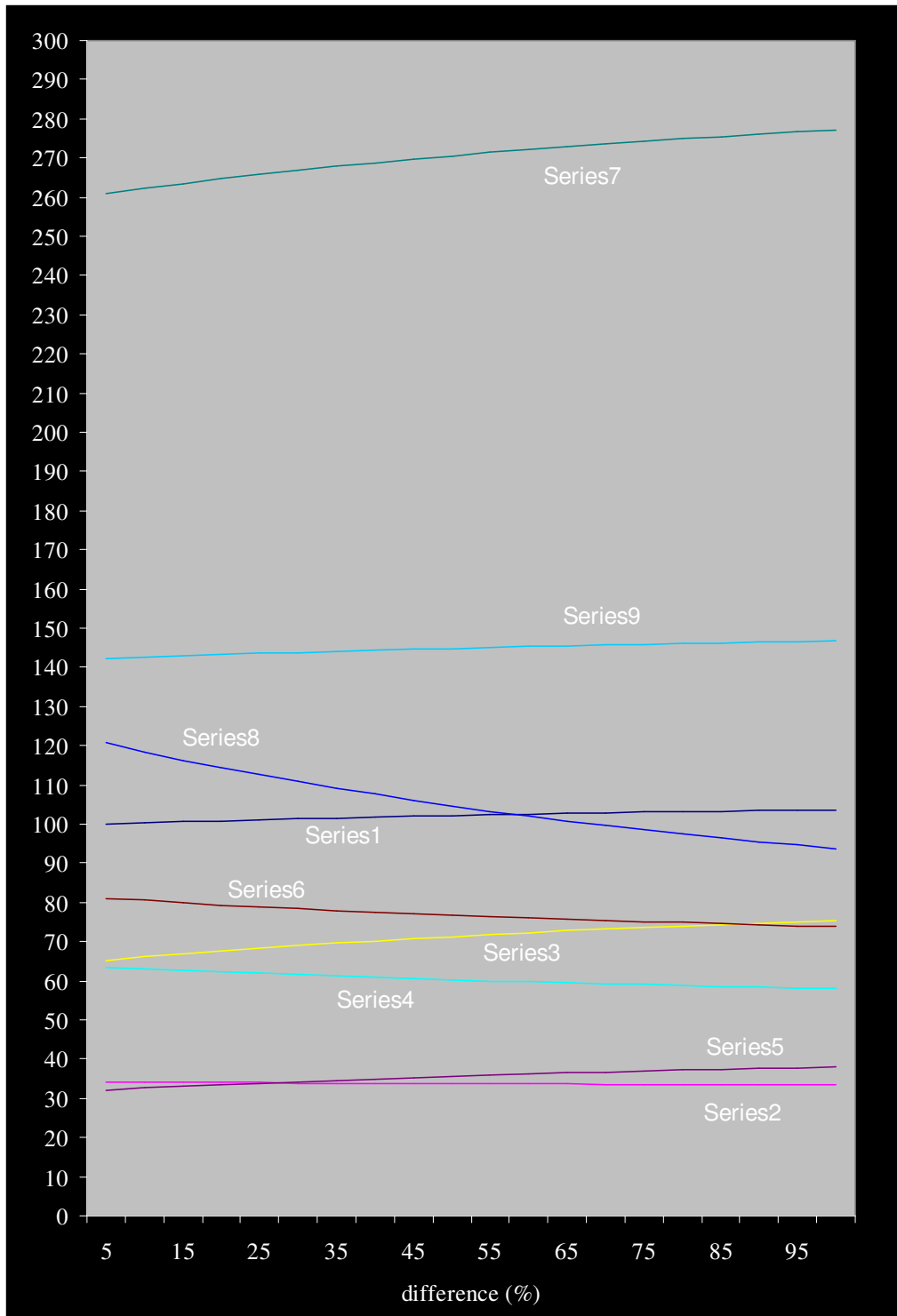
The graphics below plot the index values against different weighting alternatives.

Table B.10 - Index of epistemological empathy towards otherness (% of the average for all authors) - not considering assessment

| Series number | Work |
|---------------|--|
| 1 | <i>Uma Casa em Portugal / Richard Hewitt</i> |
| 2 | <i>Trás-os-Montes: uma viagem portuguesa / Julio Llamazares</i> |
| 3 | <i>Backwards Out of the Big World: Voyage into Portugal / Paul Hyland</i> |
| 4 | <i>The last old place: A search through Portugal / Datus C. Proper</i> |
| 5 | <i>Driving Over Lemons: An Optimist in Andalucía / Chris Stewart</i> |
| 6 | <i>It's not about the tapas: a Spanish adventure on two wheels / Polly Evans</i> |
| 7 | <i>Don Quixote's Delusions: Travels in Castilian Spain / Miranda France</i> |
| 8 | <i>Paradox of Values / Contrasts of Confusion / Frank A. Arencibia</i> |
| 9 | <i>Nuevo viaje a la Alcarría / Camilo Jose Cela</i> |

⁵⁴² While the methodological notes that follow should formally have been included in the methodology chapter, they are more appropriately included here because they are more clearly understood with the benefit of having read about the structure of knowledge in the books.

Figure 1 - Index of epistemological empathy towards otherness (% of the average for all authors)
- assessment considered

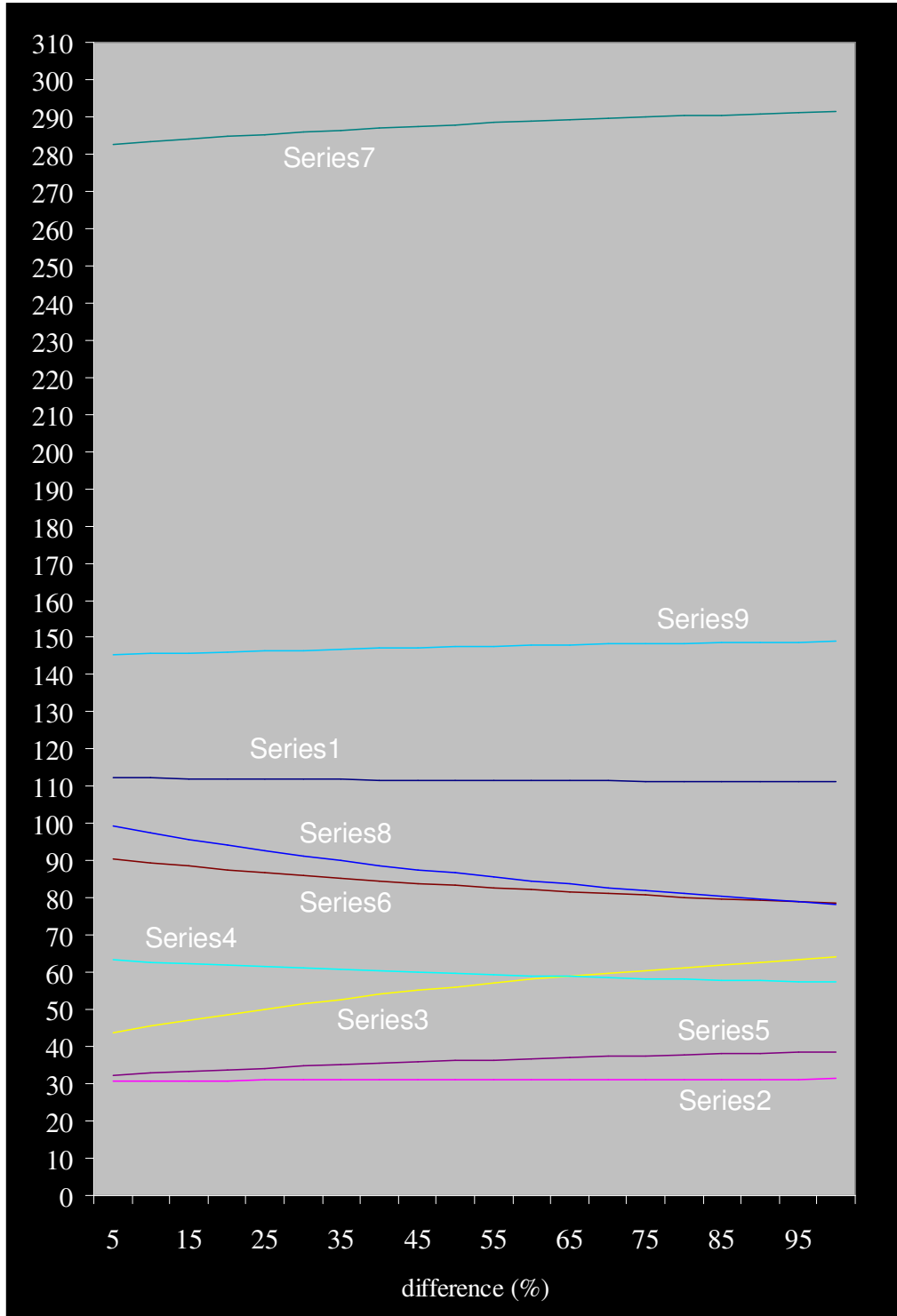


A visual inspection of the graphic allows us to see that the dominance of *Don Quixote's Delusions* (first in rank) and *Nuevo viaje a la Alcarria* (second in rank) are not affected by the increase in differences which gives ever more weight to mediation and assessment: starting respectively from around 140% and 260% of the average, a clear tendency of increase in the index values can be observed for both works. This could suggest a tendency for a higher epistemological empathy for the most experienced writers, but in the second subgroup in the rank we see *Spain: Paradox of Values* (third) along *Uma Casa em Portugal* (fourth), which according to such tendency should ranked quite low, so the tendency does not applies to the corpus.

The mentioned second group shows consistency up to a difference of 60% in weighting; from this value upwards, there is an inversion in rank, mostly due to the downwards tendency of *Spain*, which falls from around 120% of the average to around 95%, while the other work in this subgroup shows a very slight increase. A third group located significantly below the average (between 60% and 80% of the average), which includes *It's not about the tapas*, *Backwards Out of the Big World* and *The last old place*, is not very much affected by the increase in weight differences, given that only with differences higher than 90% the not very much pronounced increase tendency of *Backwards Out of the Big World* (from around 65% of the average to 75%) make it surpass the most emphatic work of this subgroup. In between 30% and 40% of the average, the lowest subgroup in terms of the index sees *Driving Over Lemons* surpassing *Trás-os-Montes* at around a 30% difference, but both works stay very much together within the weight difference interval considered.

In summary, up to 30%, the index rank is perfectly insensitive to changes in weight difference; up to 60% only a rank inversion occurs and one must go to 90% to see a second rank inversion. Further, there are no intergroup rank changes, meaning that the rank inversions observed are of low magnitude. As such, the index does not seem critically jeopardized by the subjectivity inherent in the definition of the weigh differences.

Figure 2 - Index of epistemological empathy towards otherness (% of the average for all authors)
- assessment considered



With the inclusion of assessment, the results become more insensitive to variations in differences within the interval of differences considered. *Don Quixote's Delusions* (first in rank) and *Nuevo viaje a la Alcarría* (second) maintain their positions and their large distance vis-à-vis the other authors. Their index values show little change regarding the calculation that excludes assessment, the same happening with *Driving Over Lemons* and *Trás-os-Montes*, which are still the less emphatic works and generally maintain their ordination. *Uma Casa em Portugal* and *Spain: Paradox of Values* are now consistently the third and fourth most emphatic works of the ranking, the latter converging with 6 in upper extreme of differences interval. *Backwards Out of the Big World*, which dominated *The last old place* throughout the whole interval of differences when assessment is not included, only leads now from a difference of 65% up. It should also be noted that the biggest change in the index when comparing differences of 0% with differences of 100% is 23 percentage points: this is the case of *Spain: Paradox of Values*, which sees a reduction from 101% of the average to 78% of the average.

B.6 – Sources of knowledge

In as much as they are manifest in the texts, the sources used by the authors being studied to depict the images of the social world are presented in terms of densities in Table B.11, below. As explained in the methodology chapter, each segment of text considered relevant as an image of the social world was categorized as stemming from: observation (o), reflection (r), indirect information⁵⁴³ (2nd), one or several informant(s) (i) or from more than one of these. There were also images for which the exact origin was not clear in the text but could be inferred with certainty as belonging to a set of several sources, these sets being: indirect information and/or informant (2nd / i), indirect information and/or observation (2nd / o), reflection and/or informant (r / i) and indirect information and/or informant and/or observation (2nd / i / o). Within this framework all the 1,294 images of the social world were allocated a source, more than one source or a set of sources.

⁵⁴³ Henceforth, unless otherwise noted indirect information always excludes informants.

Table B.11 – Density of use of sources of knowledge (per 10,000 words)

| Work | o | r | 2nd | i | 2nd / i | 2nd / o | r / i | 2nd / i / o |
|------------------------------------|------|------|------|------|---------|---------|-------|-------------|
| <i>Uma Casa em Portugal</i> | 7.4 | 2.6 | 0.9 | 1.3 | 0 | 0.7 | 0 | 0 |
| <i>Trás-os-Montes</i> | 17.4 | 2.8 | 0.3 | 1 | 0 | 0 | 0 | 0 |
| <i>Backwards Out of the Big...</i> | 9.2 | 2.4 | 1.4 | 2.5 | 0 | 0.2 | 0 | 0 |
| <i>The last old place</i> | 13.5 | 4.6 | 0.7 | 1.1 | 0 | 0.3 | 0 | 0 |
| <i>Driving Over Lemons</i> | 9.6 | 0.7 | 0 | 1.2 | 0 | 0 | 0 | 0 |
| <i>It's not about the tapas</i> | 5.1 | 2.3 | 1.7 | 0 | 0.3 | 0.6 | 0 | 0 |
| <i>Don Quixote's Delusions</i> | 9.2 | 3.1 | 4.4 | 5.2 | 0 | 0.3 | 0 | 0 |
| <i>Spain: Paradox of Values</i> | 8.3 | 8 | 6.8 | 0.6 | 1.3 | 1.4 | 0 | 0 |
| <i>Nuevo viaje a la Alcarria</i> | 10.7 | 4.1 | 0.4 | 3.1 | 3.3 | 0 | 0.6 | 0.1 |
| total | 90.4 | 30.6 | 16.7 | 16.1 | 4.9 | 3.4 | 0.6 | 0.1 |
| total as % of total sources | 55.5 | 18.8 | 10.2 | 9.9 | 3 | 2.1 | 0.4 | 0.1 |
| average | 10 | 3.4 | 1.9 | 1.8 | 0.5 | 0.4 | 0.1 | 0.02 |
| standard deviation | 3.6 | 2 | 2.3 | 1.6 | 1.1 | 0.5 | 0.2 | 0 |
| standard dev. / average | 0.36 | 0.6 | 1.22 | 0.89 | 2.03 | 1.21 | 3 | 3 |
| average for travellers | 106 | 105 | 94 | 168 | 150 | 49 | 225 | 225 |
| average for migrants | 84 | 109 | 139 | 57 | 79 | 183 | 0 | 0 |
| average for tourists | 111 | 75 | 55 | 29 | 32 | 78 | 0 | 0 |

As one can see in table above, the quantity of cases in which no single source is ascribed to an image is not much relevant (around 6% of the total). In what regards single source cases, by far the most used form is observation: at 90 occurrences per 10,000 words, its density is three times greater than the second most used form and greater than all the other combined. Informants are the less used form of knowledge amongst single-source cases after indirect information (although very close to it) and roughly the frequency of reflection, which is quite relevant with almost 20% of total sources.

Table B.12 – Density of use of sources of knowledge – % of the average of the corpus for each source

| Work | o | r | 2nd | i | 2nd / i | 2nd / o | r / i | 2nd / i / o |
|------------------------------------|-----|-----|-----|-----|---------|---------|-------|-------------|
| <i>Spain: Paradox of Values</i> | 82 | 233 | 368 | 33 | 237 | 373 | 0 | 0 |
| <i>Nuevo viaje a la Alcarria</i> | 105 | 121 | 24 | 173 | 599 | 0 | 900 | 900 |
| <i>Don Quixote's Delusions</i> | 91 | 91 | 237 | 290 | 0 | 70 | 0 | 0 |
| <i>Trás-os-Montes</i> | 172 | 82 | 16 | 58 | 0 | 0 | 0 | 0 |
| <i>The last old place</i> | 137 | 138 | 36 | 60 | 0 | 72 | 0 | 0 |
| <i>Backwards Out of the Big...</i> | 91 | 71 | 77 | 147 | 0 | 55 | 0 | 0 |
| <i>Uma Casa em Portugal</i> | 76 | 76 | 49 | 73 | 0 | 175 | 0 | 0 |
| <i>Driving Over Lemons</i> | 95 | 19 | 0 | 66 | 0 | 0 | 0 | 0 |
| <i>It's not about the tapas</i> | 50 | 68 | 93 | 0 | 64 | 155 | 0 | 0 |

When considering the density of use in terms of percentage of the average one can see that *Spain: Paradox of Values* leads with a total use of sources 45% above the average, being followed by *Nuevo viaje a la Alcarria*, *Don Quixote's Delusions* and *Trás-os-Montes* at around 20% above the average. *The last old place* and *Backwards Out of the Big World* are the works closer to the average, while the remaining stand significantly below, although above 50%.

In the terms of observation (which is the most important source of knowledge, as showed above), *Trás-os-Montes* (172%) and *The last old place* (137%) are clearly above the average; *Uma Casa em Portugal* (76%) and *It's not about the tapas* (50%) stand below, with the remaining standing close to the average. This is as expected, given the above seen results as regards description and the high correlation existing between description and observation.

Reflection, the second most used source (18.8% of the total density) sees a greater variability (with standard deviation at 60% of the average), with *Spain: Paradox of Values* leading density of use by far at 233% of the average, followed by *The last old place* (much lower, at 138%) and a group of three works close to the average (*Nuevo viaje a la Alcarria*, *Don Quixote's Delusions* and *Trás-os-Montes*). The remaining works stand quite behind, with *Driving Over Lemons* showing a very low value (19%).

The source indirect information shows the highest variability (excluding the ambiguous combinations which, as stated above, are not much significant in terms of density). *Spain: Paradox of Values* stands out now even more, the same happening with *Don Quixote's Delusions*.

It's not about the tapas is close to the average, with all other works, with the exception of *Backwards Out*. Specifically, *Driving Over Lemons* presents no use of this type of source. *Don Quixote's Delusions*, *Nuevo viaje a la Alcarria* and *Backwards Out of the Big World* use informants with much more intensity than the average, with all remaining works showing values below $\frac{3}{4}$ of the average. *It's not about the tapas* does not use informants at all.

As performed with the forms of knowledge, one can also consider the distribution of sources of knowledge (in terms of density) within each work, as per next table.

Table B.13 – Distribution of sources within each book (%)

| work | o | r | 2nd | i | 2nd / i | 2nd / o | r / i | 2nd / i / o | total | stand. dev. | stand. dev. / average stand. dev. (%) |
|-----------------------------|-----|-----|-----|-----|---------|---------|-------|-------------|-------|-------------|---------------------------------------|
| <i>Uma Casa...</i> | 58 | 20 | 7.1 | 10 | 0 | 5.1 | 0 | 0 | 100 | 18.2 | 97 |
| <i>Trás-os-Montes</i> | 81 | 13 | 1.4 | 4.8 | 0 | 0 | 0 | 0 | 100 | 26.2 | 139 |
| <i>Backwards Out of...</i> | 58 | 16 | 9 | 16 | 0 | 1.3 | 0 | 0 | 100 | 18.4 | 103 |
| <i>The last old place</i> | 67 | 23 | 3.4 | 5.4 | 0 | 1.3 | 0 | 0 | 100 | 21.8 | 122 |
| <i>Driving Over...</i> | 84 | 5.7 | 0 | 10 | 0 | 0 | 0 | 0 | 100 | 27.2 | 157 |
| <i>It's not about...</i> | 51 | 23 | 17 | 0 | 3.4 | 5.7 | 0 | 0 | 100 | 16.5 | 96 |
| <i>Don Quixote's...</i> | 42 | 14 | 20 | 23 | 0 | 1.2 | 0 | 0 | 100 | 14.2 | 82 |
| <i>Spain: Paradox of...</i> | 31 | 30 | 26 | 2.3 | 4.9 | 5.3 | 0 | 0 | 100 | 13.1 | 71 |
| <i>Nuevo viaje...</i> | 48 | 19 | 2 | 14 | 15 | 0 | 2.6 | 0.7 | 100 | 14.9 | 73 |
| total | 54 | 19 | 11 | 9.6 | 2.9 | 2.3 | 0.3 | 0.1 | 100 | 16.9 | 81 |
| average | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | | | |
| average for travellers | 51 | 17 | 12 | 12 | 5 | 2 | 1 | 0 | | | |
| average for migrants | 69 | 17 | 5 | 9 | 0 | 1 | 0 | 0 | | | |
| average for tourists | 55 | 22 | 12 | 5 | 2 | 5 | 0 | 0 | | | |

For all authors, observation is the most used form, albeit with large variability. Reflection is the second most used form for the majority of authors, with the exceptions of *Don Quixote's Delusions*, *Backwards Out of the Big World* and *Driving Over Lemons*. Given the low significance of sets (2nd / i; 2nd / o; r / i; and 2nd / i / o) and the possibility they thus distort the vision on variability, table below presents the results without considering them.

Table B.13.a – Distribution of sources within each book, excluding sets (%)

| work | o | r | 2nd | i | total | stand. dev. | stand. dev. / average stand. dev. (%) |
|-----------------------------|----|-----|-----|-----|-------|-------------|---------------------------------------|
| <i>Uma Casa...</i> | 61 | 21 | 7.5 | 11 | 100 | 21.2 | 96 |
| <i>Trás-os-Montes</i> | 81 | 13 | 1.4 | 4.8 | 100 | 32.5 | 147 |
| <i>Backwards Out of...</i> | 59 | 16 | 9.1 | 16 | 100 | 19.8 | 96 |
| <i>The last old place</i> | 68 | 23 | 3.4 | 5.5 | 100 | 26 | 126 |
| <i>Driving Over...</i> | 84 | 5.7 | 0 | 10 | 100 | 34.3 | 174 |
| <i>It's not about...</i> | 56 | 25 | 19 | 0 | 100 | 20 | 125 |
| <i>Don Quixote's...</i> | 42 | 14 | 20 | 24 | 100 | 10.4 | 71 |
| <i>Spain: Paradox of...</i> | 35 | 34 | 29 | 2.6 | 100 | 13.1 | 78 |

Once more, the results are presented as percentage of the average for all authors (that is, as percentage of the average for each column in the following table.

Table B.14 – Distribution of sources within each book (percentage) as percentage of the average

| Work | o | r | 2nd | i | 2nd / i | 2nd / o | r / i | 2nd / i / o |
|------------------------------------|------|------|------|------|---------|---------|-------|-------------|
| <i>Uma Casa em Portugal</i> | 99.9 | 112 | 74.3 | 105 | 0 | 228 | 0 | 0 |
| <i>Trás-os-Montes</i> | 140 | 71.8 | 14.4 | 50 | 0 | 0 | 0 | 0 |
| <i>Backwards Out of the Big...</i> | 101 | 85.4 | 94.9 | 168 | 0 | 58.3 | 0 | 0 |
| <i>The last old place</i> | 116 | 126 | 35.2 | 56 | 0 | 60.7 | 0 | 0 |
| <i>Driving Over Lemons</i> | 146 | 31.7 | 0 | 108 | 0 | 0 | 0 | 0 |
| <i>It's not about the tapas</i> | 87.8 | 127 | 181 | 0 | 135 | 260 | 0 | 0 |
| <i>Don Quixote's Delusions</i> | 72 | 77.4 | 209 | 244 | 0 | 52.9 | 0 | 0 |
| <i>Spain: Paradox of Values</i> | 54.6 | 167 | 271 | 23.7 | 193 | 240 | 0 | 0 |
| <i>Nuevo viaje a la Alcarría</i> | 82.7 | 102 | 20.9 | 145 | 572 | 0 | 900 | 900 |

Driving Over Lemons and *Trás-os-Montes* are the authors who attain more importance to observation, with only *Spain: Paradox of Values* staying very far to the average in this regard. Conversely, this work stands out in terms of reflection (almost 70% above the average), while the other works are not much far from the average, with the exception of *Driving Over Lemons* (one

third of the average). *Spain* also leads in terms of indirect information, but here dispersion is much greater, with three works below 40% of the average. Finally, dispersion is also very high in what regards informants, with *Don Quixote's Delusions* more than doubling the average and four authors below 60% of the average.

Also similarly to what was worked out for the forms of knowledge, a composite index is calculated which considers the density of forms (relative to the average of the corpus for each form) and the distribution of forms within each book (relative to the average of the corpus for each form, as per next table).

Table B.15 – Composite index of sources

| work | o | r | 2a | i | 2nd / i | 2nd / o | r / i | 2nd / i / o |
|------------------------------------|----------|----------|-----------|----------|----------------|----------------|--------------|--------------------|
| <i>Uma Casa em Portugal</i> | 74.1 | 85.6 | 36.7 | 77.1 | 0 | 400 | 0 | 0 |
| <i>Trás-os-Montes</i> | 243 | 59.2 | 2.3 | 29 | 0 | 0 | 0 | 0 |
| <i>Backwards Out of the Big...</i> | 92 | 61.3 | 73 | 240 | 0 | 31.9 | 0 | 0 |
| <i>The last old place</i> | 156 | 170 | 12.8 | 33.9 | 0 | 43.9 | 0 | 0 |
| <i>Driving Over Lemons</i> | 139 | 6.1 | 0 | 71.4 | 0 | 0 | 0 | 0 |
| <i>It's not about the tapas</i> | 44.4 | 86 | 169 | 0 | 86.1 | 402 | 0 | 0 |
| <i>Don Quixote's Delusions</i> | 66.3 | 71 | 499 | 712 | 0 | 36.9 | 0 | 0 |
| <i>Spain: Paradox of Values</i> | 44.8 | 391 | 987 | 7.9 | 459 | 895 | 0 | 0 |
| <i>Nuevo viaje a la Alcarria</i> | 87.9 | 125 | 5 | 253 | 3423 | 0 | 8100 | 8100 |
| average | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| average for travellers | 85 | 148 | 373 | 261 | 971 | 233 | 2025 | 2025 |
| average for migrants | 164 | 97 | 29 | 101 | 0 | 25 | 0 | 0 |
| average for tourists | 59 | 86 | 103 | 39 | 43 | 401 | 0 | 0 |

For an easier comparison, these results are presented in terms of percentage of the average of each column, that is, percentage of the average of the corpus for each form of knowledge.

Table B.16 – Composite index of sources as percentage of the average for each column / source

| work | o | r | 2nd | i | 2nd / i | 2nd / o | r / i | 2nd / i / o |
|------------------------------------|----------|----------|------------|----------|----------------|----------------|--------------|--------------------|
| average | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| <i>Uma Casa em Portugal</i> | 70.3 | 73.1 | 18.5 | 48.8 | 0 | 199 | 0 | 0 |
| <i>Trás-os-Montes</i> | 231 | 50.5 | 1.2 | 18.3 | 0 | 0 | 0 | 0 |
| <i>Backwards Out of the Big...</i> | 87.3 | 52.4 | 36.8 | 151.7 | 0 | 15.9 | 0 | 0 |
| <i>The last old place</i> | 148.5 | 144.8 | 6.5 | 21.4 | 0 | 21.8 | 0 | 0 |
| <i>Driving Over Lemons</i> | 131.9 | 5.2 | 0 | 45.2 | 0 | 0 | 0 | 0 |
| <i>It's not about the tapas</i> | 42.1 | 73.4 | 85.3 | 0 | 19.5 | 200 | 0 | 0 |
| <i>Don Quixote's Delusions</i> | 62.9 | 60.7 | 251.5 | 449.8 | 0 | 18.4 | 0 | 0 |
| <i>Spain: Paradox of Values</i> | 42.5 | 333.5 | 497.7 | 5 | 104 | 445 | 0 | 0 |
| <i>Nuevo viaje a la Alcarria</i> | 83.4 | 106.4 | 2.5 | 159.8 | 776.4 | 0 | 900 | 900 |

At more than twice the average, *Trás-os-Montes* stands out as the highest composite user of observation, being followed by *The last old place* and *Driving Over Lemons*, still significantly above the average. Two works (*Nuevo viaje a la Alcarria* and *Backwards Out of the Big World*) are not very far from the average, with the remaining four standing very much below the average.

In terms of reflection, *Spain: Paradox of Values* is very much above the average (more than 3 times the average), followed by *The last old place* (1.4 times the average) and *Nuevo viaje a la Alcarria* (around the average), with all other authors much behind the average. This variability is even more marked for indirect information, where *Spain: Paradox of Values* leading is more pronounced, at almost 5 times the average, followed by *Don Quixote's Delusions* (2.5 times the average) and all other authors staying very much below the average. Only slightly less dispersed than the use of indirect information, the use of informants sees *Don Quixote's Delusions* reaching 5 times the average and two other works (*Nuevo viaje a la Alcarria* and *Backwards Out of the Big World*) 50% above the average, with all other authors very much below.

B.7 – The themes of the images of the social world

As detailed in the methodology chapter, the images of the social world are categorized as *images of something* and *images in a given the domain*. The results are shown in next table.

Table B.17 - Themes: “images of something” and “images in a given the domain”

| work | images in a given domain (a) | images of something (b) | a / b (%) |
|---------------------------------------|-------------------------------------|--------------------------------|------------------|
| <i>Uma Casa em Portugal</i> | 0 | 97 | 0.0 |
| <i>Trás-os-Montes</i> | 1 | 145 | 0.7 |
| <i>Backwards Out of the Big World</i> | 1 | 151 | 0.7 |
| <i>The last old place</i> | 0 | 144 | 0.0 |
| <i>Driving Over Lemons</i> | 1 | 108 | 0.9 |
| <i>It's not about the tapas</i> | 2 | 74 | 2.7 |
| <i>Don Quixote's Delusions</i> | 1 | 194 | 0.5 |
| <i>Spain: Paradox of Values</i> | 7 | 206 | 3.4 |
| <i>Nuevo viaje a la Alcarria</i> | 0 | 175 | 0.0 |
| Total | 13 | 1294 | 1.0 |

The total number of *images in a given the domain* is 1% of the total number of *images of something*, with all works showing percentages below 4% and some of them even zero. Given this low quantitative relevance of the *images in a given the domain* and their irrelevance in forming a portrait of the regions experienced by the authors, the analysis in this study only focus on the *images of something*, which are called images of the social world.

As argued in the methodology chapter and as with other indicators, above, both the absolute number of themes and their density of extension are important for the analysis, because they are correspondingly associated with an external view (that of the average reader) and an internal (that of a systematic analysis). The internal analysis is furthered by the use of the concept of extension (also explained in the methodology chapter) and Portugal and Spain are also analysed independently, to infer the global pictures of each of the countries constructed by the relevant authors. Given the large number of themes and that, for Spain and for Portugal, roughly the top 30% themes in terms of density of extension account for 70% of total density of extension, the analysis will focus on those top 30%.

External analysis: the absolute frequency ((change elsewhere)) of themes

On the next two tables (for Portugal and for Spain, respectively) the themes are ranked according to their percentage in the total of themes (shown in third column). The fourth column – *accumulated percentage* – shows the accumulated values of the third column, that is, the accumulated percentages down to that row, starting from the top of the Table (that is, from the top value). The fifth column - *accumulated percentage – rank* – shows the number of themes (or rows) from the top of the Table down to that row as percentage of total different themes (or rows).

On the the table below one can see that, for Portugal, the top 29.0% (last column) in terms of number (down to the theme *modern technology*) account for 70.8% of the total number of images of the social world. All themes below this one (that is, roughly the bottom 70%, which account for roughly 30% of the total number of themes) present intensities lower than 1.9% of the total.

Table B.18 - Number of themes as percentage of total themes – Portugal

| # | Theme | % in total | accum. % | accum. % rank |
|----|---|------------|----------|---------------|
| 1 | non mechanized / subsistence agriculture | 7.6 | 7.6 | 1.6 |
| 2 | (non specified) agriculture | 7.3 | 14.9 | 3.2 |
| 3 | material incompetence / incapacity | 7.1 | 22.0 | 4.8 |
| 4 | material want / underdevelopment | 6.5 | 28.5 | 6.5 |
| 5 | past | 4.7 | 33.1 | 8.1 |
| 6 | law, rules and/or institutions - disregard for | 4.3 | 37.4 | 9.7 |
| 7 | community / gemeinschaft | 3.9 | 41.3 | 11.3 |
| 8 | rationality / reflection / precision - absence / low level and superstition | 3.5 | 44.9 | 12.9 |
| 9 | (social) change - residual | 3.4 | 48.2 | 14.5 |
| 10 | emigration | 3.4 | 51.6 | 16.1 |
| 11 | (social) change - residual: absence / slow | 3.2 | 54.7 | 17.7 |
| 12 | “tradition” and “traditional” customs / rituals | 3.2 | 57.9 | 19.4 |
| 13 | self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market | 2.4 | 60.3 | 21.0 |

| | | | | |
|----|---|-----|------|------|
| 14 | industrialized production / mass market | 2.4 | 62.8 | 22.6 |
| 15 | isolation / absence of cosmopolitanism | 2.2 | 65.0 | 24.2 |
| 16 | soberness / restraint / “conservatism” | 2.0 | 67.0 | 25.8 |
| 17 | health - problems / damaging behaviours | 1.9 | 68.9 | 27.4 |
| 18 | modern technology | 1.9 | 70.8 | 29.0 |
| 19 | gender differentiation | 1.7 | 72.4 | 30.6 |
| 20 | “authenticity” | 1.5 | 73.9 | 32.3 |
| 21 | religion - importance | 1.5 | 75.4 | 33.9 |
| 22 | material competence / capacity: capacity to organize resources / efficiency / diligence / competence / knowledge / infrastructure | 1.5 | 76.9 | 35.5 |
| 23 | ethnic minorities | 1.3 | 78.2 | 37.1 |
| 24 | cosmopolitanism / no isolation | 1.3 | 79.5 | 38.7 |
| 25 | harmony / integration / tolerance / (absence and/or resolution of conflicts) | 1.1 | 80.6 | 40.3 |
| 26 | modesty / low self-esteem | 1.1 | 81.8 | 41.9 |
| 27 | “modernity” / “contemporariness” | 1.1 | 82.9 | 43.5 |
| 28 | tourism (industry) | 1.1 | 84.0 | 45.2 |
| 29 | affective / particular - importance / predominance (over instrumental / universal) | 0.9 | 84.9 | 46.8 |
| 30 | innocence / idealism / nostalgia | 0.9 | 85.8 | 48.4 |
| 31 | modern technology - absence / low level | 0.9 | 86.8 | 50.0 |
| 32 | “underdevelopment” / “Third World” | 0.9 | 87.7 | 51.6 |
| 33 | intolerance / intransigence / prejudice / discrimination | 0.9 | 88.6 | 53.2 |
| 34 | conflict / violence / aggressiveness / rudeness / absence of integration | 0.9 | 89.6 | 54.8 |
| 35 | population decline | 0.7 | 90.3 | 56.5 |
| 36 | anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium | 0.7 | 91.1 | 58.1 |
| 37 | “medieval” | 0.7 | 91.8 | 59.7 |
| 38 | satisfaction / peacefulness / fulfilment / happiness | 0.7 | 92.6 | 61.3 |
| 39 | rural / urban - overlap | 0.6 | 93.1 | 62.9 |
| 40 | regard for law, rules, institutions | 0.6 | 93.7 | 64.5 |
| 41 | rationality / reflection / precision | 0.6 | 94.2 | 66.1 |
| 42 | “authenticity” - absence / decay | 0.6 | 94.8 | 67.7 |
| 43 | decay (generic) | 0.4 | 95.2 | 69.4 |
| 44 | arrogance / pride | 0.4 | 95.5 | 71.0 |
| 45 | middle class | 0.4 | 95.9 | 72.6 |
| 46 | development / material prosperity | 0.4 | 96.3 | 74.2 |
| 47 | individualism | 0.4 | 96.6 | 75.8 |

| | | | | |
|----|---|-----|-------|-------|
| 48 | excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude | 0.4 | 97.0 | 77.4 |
| 49 | sexuality / eroticism | 0.4 | 97.4 | 79.0 |
| 50 | capacity to be “reasonable” / have “good sense” | 0.4 | 97.8 | 80.6 |
| 51 | ecological conscience - absence | 0.2 | 98.0 | 82.3 |
| 52 | social equality | 0.2 | 98.1 | 83.9 |
| 53 | social inequality | 0.2 | 98.3 | 85.5 |
| 54 | society - gesellschaft | 0.2 | 98.5 | 87.1 |
| 55 | leisure (practice) | 0.2 | 98.7 | 88.7 |
| 56 | gender differentiation - absence / low level | 0.2 | 98.9 | 90.3 |
| 57 | otherness of otherness | 0.2 | 99.1 | 91.9 |
| 58 | industrialized production - decay | 0.2 | 99.3 | 93.5 |
| 59 | immaterial greatness / superiority | 0.2 | 99.4 | 95.2 |
| 60 | liberal mores / liberalization of mores | 0.2 | 99.6 | 96.8 |
| 61 | health - good | 0.2 | 99.8 | 98.4 |
| 62 | political instability | 0.2 | 100.0 | 100.0 |
| 62 | affective incompetence / incapacity, coldness / insensibility | 0.3 | 98.8 | 88.7 |
| 62 | cosmopolitanism / no isolation | 0.3 | 99.1 | 90.1 |
| 62 | “social change” | 0.1 | 99.2 | 91.5 |
| 62 | urbanization | 0.1 | 99.3 | 93.0 |
| 62 | incapacity to be “reasonable” / have “good sense” | 0.1 | 99.5 | 94.4 |
| 62 | industrialized production - decay | 0.1 | 99.6 | 95.8 |
| 62 | sexuality / eroticism - absence / low intensity / low importance | 0.1 | 99.7 | 97.2 |
| 62 | (well-functioning) democracy | 0.1 | 99.9 | 98.6 |
| 62 | “medieval” | 0.1 | 100.0 | 100.0 |

The table below shows a rather similar result for Spain, in as much as the top 29.6% themes (down to the theme *industrialized production / mass market*) account for 70.2% of the total number of themes. As in the case of Portugal, all themes below this threshold present very low percentages (in this case below 1.7%). This correspondence (30% of themes with 70% of frequency) allows us to focus only on the most frequent themes covering simultaneously 70% of frequency, as is done below in tables B.20 and B.21. The next two tables present these results for Portugal and Spain.

Table B.19 - Number of themes as percentage of total themes – Spain

| # | Theme | % in total | accum. % | accum. % rank |
|----|---|------------|----------|---------------|
| 1 | (social) change - residual | 6.9 | 6.9 | 1.4 |
| 2 | law, rules and/or institutions - disregard for | 6.4 | 13.4 | 2.8 |
| 3 | material incompetence / incapacity | 5.8 | 19.1 | 4.2 |
| 4 | conflict / violence / aggressiveness / rudeness / absence of integration | 5.0 | 24.1 | 5.6 |
| 5 | rationality / reflection / precision - absence / low level and superstition | 3.7 | 27.7 | 7.0 |
| 6 | “tradition” and “traditional” customs / rituals | 3.7 | 31.4 | 8.5 |
| 7 | religion - importance | 3.7 | 35.1 | 9.9 |
| 8 | intolerance / intransigence / prejudice / discrimination | 3.5 | 38.6 | 11.3 |
| 9 | self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market | 3.5 | 42.1 | 12.7 |
| 10 | non mechanized / subsistence agriculture | 3.3 | 45.4 | 14.1 |
| 11 | material competence / capacity: capacity to organize resources / efficiency / diligence / competence / knowledge / infrastructure | 3.1 | 48.6 | 15.5 |
| 12 | community / gemeinschaft | 3.0 | 51.6 | 16.9 |
| 13 | (non specified) agriculture | 2.9 | 54.5 | 18.3 |
| 14 | material want / underdevelopment | 2.5 | 56.9 | 19.7 |
| 15 | gender differentiation | 2.5 | 59.4 | 21.1 |
| 16 | excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude | 2.1 | 61.5 | 22.5 |
| 17 | health - problems / damaging behaviours | 1.8 | 63.4 | 23.9 |
| 18 | anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium | 1.7 | 65.1 | 25.4 |
| 19 | modern technology | 1.7 | 66.8 | 26.8 |
| 20 | development / material prosperity | 1.7 | 68.5 | 28.2 |
| 21 | industrialized production / mass market | 1.7 | 70.2 | 29.6 |
| 22 | leisure (practice) | 1.6 | 71.7 | 31.0 |
| 23 | soberness / restraint / “conservatism” | 1.6 | 73.3 | 32.4 |
| 24 | sexuality / eroticism | 1.4 | 74.7 | 33.8 |
| 25 | population decline | 1.3 | 76.0 | 35.2 |
| 26 | liberal mores / liberalization of mores | 1.3 | 77.4 | 36.6 |
| 27 | affective / particular - importance / predominance (over instrumental / universal) | 1.3 | 78.7 | 38.0 |
| 28 | otherness of otherness | 1.3 | 80.0 | 39.4 |
| 29 | decay (generic) | 1.0 | 81.0 | 40.8 |
| 30 | “authenticity” - absence / decay | 0.9 | 81.9 | 42.3 |

| | | | | |
|----|--|-----|------|------|
| 31 | tourism (industry) | 0.9 | 82.9 | 43.7 |
| 32 | gender differentiation - absence / low level | 0.9 | 83.8 | 45.1 |
| 33 | satisfaction / peacefulness / fulfilment / happiness | 0.9 | 84.7 | 46.5 |
| 34 | religion - decay / low importance | 0.8 | 85.5 | 47.9 |
| 35 | harmony / integration / tolerance / (absence and/or resolution of conflicts) | 0.8 | 86.3 | 49.3 |
| 36 | sexual minorities | 0.8 | 87.0 | 50.7 |
| 37 | separatism | 0.7 | 87.7 | 52.1 |
| 38 | population - recovery / growth | 0.7 | 88.4 | 53.5 |
| 39 | population - ageing / low birth rate | 0.7 | 89.0 | 54.9 |
| 40 | past | 0.7 | 89.7 | 56.3 |
| 41 | “modernity” / “contemporariness” | 0.7 | 90.3 | 57.7 |
| 42 | innocence / idealism / nostalgia | 0.7 | 91.0 | 59.2 |
| 43 | society - gesellschaft | 0.5 | 91.5 | 60.6 |
| 44 | health - good | 0.5 | 92.0 | 62.0 |
| 45 | ethnic minorities | 0.5 | 92.5 | 63.4 |
| 46 | agriculture - absence / low level / decay | 0.5 | 93.1 | 64.8 |
| 47 | (social) change - residual: absence / slow | 0.5 | 93.6 | 66.2 |
| 48 | “authenticity” | 0.5 | 94.1 | 67.6 |
| 49 | instrumental / universal - predominance / importance (over affective / particular) | 0.4 | 94.5 | 69.0 |
| 50 | modesty / low self-esteem | 0.4 | 94.9 | 70.4 |
| 51 | egotism / egocentrism / greed / envy | 0.4 | 95.3 | 71.8 |
| 52 | regard for law, rules, institutions | 0.4 | 95.7 | 73.2 |
| 53 | isolation / absence of cosmopolitanism | 0.4 | 96.1 | 74.6 |
| 54 | modern technology - absence / low level | 0.4 | 96.5 | 76.1 |
| 55 | “cultural identity” - absence / low level / decay | 0.3 | 96.7 | 77.5 |
| 56 | individualism | 0.3 | 97.0 | 78.9 |
| 57 | “underdevelopment” / “Third World” | 0.3 | 97.3 | 80.3 |
| 58 | innocence / idealism / nostalgia - absence / low level | 0.3 | 97.5 | 81.7 |
| 59 | capacity to be “reasonable” / have “good sense” | 0.3 | 97.8 | 83.1 |
| 60 | arrogance / pride | 0.3 | 98.0 | 84.5 |
| 61 | social inequality | 0.3 | 98.3 | 85.9 |
| 62 | rationality / reflection / precision | 0.3 | 98.6 | 87.3 |
| 62 | affective incompetence / incapacity, coldness / insensibility | 0.3 | 98.8 | 88.7 |
| 62 | cosmopolitanism / no isolation | 0.3 | 99.1 | 90.1 |
| 62 | “social change” | 0.1 | 99.2 | 91.5 |
| 62 | urbanization | 0.1 | 99.3 | 93.0 |
| 62 | incapacity to be “reasonable” / have “good sense” | 0.1 | 99.5 | 94.4 |
| 62 | industrialized production - decay | 0.1 | 99.6 | 95.8 |

| | | | | |
|----|--|-----|-------|-------|
| 62 | sexuality / eroticism - absence / low intensity / low importance | 0.1 | 99.7 | 97.2 |
| 62 | (well-functioning) democracy | 0.1 | 99.9 | 98.6 |
| 62 | “medieval” | 0.1 | 100.0 | 100.0 |

The following table presents the 30% more significant themes for Portugal.

Table B.20 - Number of themes as percentage of total of 30% more frequent themes for each of the 30% more frequent themes – Portugal

| Theme | % of top 30% |
|---|--------------|
| non mechanized / subsistence agriculture | 10.8 |
| (non specified) agriculture | 10.3 |
| material incompetence / incapacity | 10.0 |
| material want / underdevelopment | 9.2 |
| past | 6.6 |
| disregard for law, rules, institutions | 6.1 |
| community / gemeinschaft | 5.5 |
| rationality / reflection / precision - absence / low level and superstition | 5.0 |
| (social) change - residual | 4.7 |
| emigration | 4.7 |
| (social) change - residual: absence / slow | 4.5 |
| “tradition” and “traditional” customs / rituals | 4.5 |
| self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market | 3.4 |
| industrialized production / mass market | 3.4 |
| isolation / absence of cosmopolitanism | 3.2 |
| soberness / restraint / “conservatism” | 2.9 |
| health - problems / damaging behaviours | 2.6 |
| modern technology | 2.6 |

Considering the subset “30% of themes / 70% of significance”, the first four more frequent themes for Portugal, accounting 40% of the total, regard production and the material situation. Excluding from the group the theme *(non specified) agriculture*⁵⁴⁴, 30% of the themes convey a

⁵⁴⁴ As highlighted in the methodology chapter, this later theme is not deemed necessarily an indicator of material insufficiency. This contrasts to the meaning attributed in this work to *non mechanized / subsistence agriculture*, because it is assumed that the non mechanized nature of agricultural production makes it (almost automatically)

picture of a country with insufficiencies in material terms, which could be deemed reinforced by *health - problems / damaging behaviours*. The theme which contradicts this picture, *industrialized production / mass market* is neutralized by its opposite (*self-sufficiency / non-industrialized production / absence of specialization in production / absence of mass market*), showing the same percentage (3.4%)⁵⁴⁵. Related to this disadvantaged material position is the phenomenon of *emigration*.

subsistence agriculture (which is deemed an indicator of material want, due to the lack of surpluses), while in *self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market* there is the possibility of the existence of surpluses which can be traded (although not in a mass market). Be as it may, the theme *self-sufficiency...* is not absolutely needed to see pre-modernity in Portugal, the reason why it is decided not to perform the detailed analysis necessary to clarify this issue.

⁵⁴⁵ A methodological note (which might have sounded too abstract in the methodology chapter without the clarifying benefit of a concrete situation) is needed here. The notion of neutralization of a theme by another (and its general case, mitigation of a theme by another) excludes the possibility that the reader might see/receive a society as made of contradictions in the sense of containing different locations along a dimension (e.g., a society that is underdeveloped in one image and developed in another). This is assumed as premise on the grounds that given the large amount of information (namely in the form of themes) each book of the corpus contains and the fact that by definition *the average reader* (as defined in detail in the corresponding section of the methodology chapter) is not performing a systematic analysis of the book (e.g., generally s/he will not be taking notes).

Considering the internal analysis aims precisely at systematization, the exercise of mitigation / neutralization could be problematic in that it would hide from view those contradictory aspects of a society. It is even possible that contradiction exists not between two subdivisions of a society (e.g., two social groups are classified each in an extreme of the same axis, say a group of poor people and a group of wealthy people) but also within the same subdivision (the same group is presented both as poor and affluent). It should be noted, however, that the internal analysis considers the degree of generalization of each image which gives rise to a theme, that is, based on whether the image refers to an individual, a group or a whole society or people (as explained in detail in the corresponding section of the methodology chapter). If one accepts that an image of an individual can mitigate / neutralize the contrary image of another on the grounds that they have the same degree of abstraction and that the same is true with two groups or two peoples, then if the degree of generalization is considered as a “weight”, one can perform mitigation / neutralization operations because the when weighted in such a way, individuals and/or entities with different degrees of generalization become comparable in terms of extension of themes.

Therefore, an image of a social group – which has a degree of abstraction 2, as established in that same chapter – will give rise to a theme with an intensity which is the double of the intensity of a theme arising from the image of an individual – which has a degree of abstraction 1, as established in that same chapter. If this themes oppose each other (say, one is social change, the other its absence), one can “subtract” 2-1 and get a global picture (with a density of 1) of the society, country or people which encompasses the referred individual and group. (Of course this is subject to the criticism of the subjectivity involved in the classification of images in degrees of generalization and of the possibly reduced number of degrees (only three). Also the intensity of themes is not considered (say “poverty” versus “extreme poverty”).

This allows, in what regards in the internal analysis, for mitigation / neutralization operations but (1) taking into account that the “average” (even weighted) may hide from view a strong “variation” and (2) only concerning *some* themes, as many dimension can not be “add up”. An example of (1) is the calculation of an index of material insufficiency based on a group of contradictory themes, that is, formed by themes that affirm material insufficiency and themes that affirm material sufficiency. Similarly to the calculation of GDP per capita, the final value that would not tell anything about of the level of income asymmetries, making comparisons with other instances incomplete. Taking into account these restrictions but also the fact that there is some rational in the mitigation / neutralization operations, their effects in the internal analysis should be compared by looking at the results it generates vis-à-vis the results generated when the operations are not performed.

In what regards the functioning of social life, there is a clear picture of pre-modernity⁵⁴⁶. This can be seen in a group of themes which make up 28% of the total: *past; community / gemeinschaft; self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market; “tradition” and “traditional” customs / rituals; rationality / reflection / precision - absence / low level and superstition; and isolation / absence of cosmopolitanism* (to which *soberness / restraint / “conservatism”* could possibly be added, increasing the group's percentage to 30.5%). It should be noted that besides the theme (*social*) *change (residual category)*, there are no themes that may imply (social) change, and that this theme (with 4.7 % of total) is neutralized by the its opposite, which shows a very identical percentage (4.5%).⁵⁴⁷

The association of the significant theme *disregard for law, rules and institutions*, ranking sixth in a total of eighteen themes, to this picture of pre-modernity is not straightforward because laws, rules and institutions can be elements of pre-modern society.

Table B.21 - Number of themes as percentage of total of 30% more frequent themes for each of the 30% more frequent themes – Spain

| Theme | % of top 30% |
|---|---------------------|
| (social) change - residual | 9.9 |
| disregard for law, rules, institutions | 9.1 |
| material incompetence / incapacity | 8.2 |
| conflict / violence / aggressiveness / rudeness / absence of integration | 7.1 |
| rationality / reflection / precision - absence / low level and superstition | 5.2 |
| “tradition” and “traditional” customs / rituals | 5.2 |
| religion – importance | 5.2 |
| intolerance / intransigence / prejudice / discrimination | 5.0 |
| self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market | 5.0 |
| non mechanized / subsistence agriculture | 4.7 |
| material competence / capacity: capacity to organize resources / efficiency / diligence / competence / knowledge / infrastructure | 4.5 |

⁵⁴⁶ It should also be noted that the use of the top 30% themes to infer modernity or pre-modernity is not a totally rigorous process because although some themes might, by their general definition, be associated with one of these poles, only the reading of the actual content of the textual excerpt which gives to the classification within the duality is ultimately absolutely valid. This analysis is performed in the next section.

⁵⁴⁷ For this reason, these themes opposing pre-modernity do not show up in Table B.24, (page 311 below), which summarizes the differences between Portugal and Spain and external and internal analysis.

| | |
|---|-----|
| community / gemeinschaft | 4.3 |
| (non specified) agriculture | 4.1 |
| material want / underdevelopment | 3.5 |
| gender differentiation | 3.5 |
| excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude | 3.0 |
| health - problems / damaging behaviours | 2.6 |
| anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium | 2.4 |
| modern technology | 2.4 |
| development / material prosperity | 2.4 |
| industrialized production / mass market | 2.4 |

Similarly to what the visions of Portugal described above, Spain shows up as somewhat disadvantaged country in material terms in the themes *material incompetence / incapacity, non mechanized / subsistence agriculture, material want / underdevelopment* and *health - problems / damaging behaviours*, which make up 19% of the total, to which *self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market* could be added⁵⁴⁸. However, that total is quite lower than that of the equivalent group for Portugal (30%, as referred above) and it is also significantly counterweighted by *material competence / capacity: capacity to organize resources / efficiency / diligence / competence / knowledge / infrastructure, modern technology, industrialized production / mass market* and *development / material prosperity* (which account for 12% of total frequency). This draws Spain as still deprived, but significantly less deprived country than Portugal.

Spain is also pictured as pre-modern in the themes *tradition and “traditional” customs / rituals, self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market, community / gemeinschaft, rationality / reflection / precision - absence / low level and superstition* and *gender differentiation*. The sum of their percentages (23.2%) is lower than the equivalent for Portugal (30%, as referred above) and opposed by the importance of *(social) change*, the most important theme for Spain, with a percentage of 10%. Considering that religion – quite important in Spain and not in Portugal – is not taken as an indicator of pre-modern society (as detailed in the discussion of this concept in the methodology chapter), one

⁵⁴⁸ For a discussion of the theme *self-sufficiency...* as an indicator of material want and the difference vis-à-vis the theme *non mechanized / subsistence agriculture* in this regard see the section on themes in methodology and footnote 544, on page 301 above.

concludes that Spain is represented as a more modern country (or, more precisely, as less pre-modern country) than Portugal. Finally, the unclear relation of the theme *disregard for law, rules and institutions* with the pair modern / pre-modern society applies as in Portugal: it is not possible to associate it in a straightforward manner to any of the components of the pair.

Ranking second with 9.1%, a percentage significantly higher than in Portugal, this theme could be associated with another very significant difference between the two countries. Considering it jointly with *conflict / violence / aggressiveness / rudeness / absence of integration* (ranking fourth, with 7%), we see Spain depicted (in 16% of the number of themes) as a less socially harmonious country (in absolute terms and in comparison to Portugal, which shows no themes within this dimension of social harmony). This tendency might in turn be linked with intrinsic qualities the authors see in (the) people of the country (*intolerance / intransigence / prejudice / discrimination; excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude and anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium*), with a total percentage nearing 10%.

Internal analysis: the density of extension of themes

As argued in the methodology chapter, besides the external perspective of the reader this study intends to find deeper patterns in what regards the themes used by the authors of the corpus to represent contemporary Portugal and Spain. This is performed by calculating the extension of themes, that is, as detailed in that same methodology chapter, by considering the degree of generality of the image that gives rise to each occurrence of a theme. Given in this internal perspective the number of words of the works also becomes relevant, extension is calculated in terms of density (which is named density of extension, that is, density per, say, 10,000 words).

As with the analysis of the number of themes, such analysis of the density of extension of themes benefits from focusing on the most significant ones. In the case of Portugal, the top 30.6% themes in terms of density of extension account for 70.6% of the total extension. All themes below this one (that is, roughly the bottom 70%, which account for roughly 30% of the total density of extension) present values lower than 1.8% of the total⁵⁴⁹. Similarly, in the case of

⁵⁴⁹ This is not to say of course that the themes of this second group, despite its lower intensity, do not have potential to impact on a given reader. Notwithstanding, as was argued in the methodology chapter, the concept of average

Spain the top 30.1% themes in terms of density of extension account for 70.4% of the total extension. As in the case of Portugal, all themes below this threshold present very low intensities (in this case below 1.5% of the total).

Once more, as with the number of the themes, this correspondence (30% of themes with 70% of frequency) allows us to focus only on the most frequent themes. The next two tables present, for Portugal and Spain respectively, the density of extension for each themes belonging to the set of (roughly) top 30% themes as percentage of the total density of extension of the top 30% themes taken together.

Table B.22 – Density of extension per theme of each of the top 30% as percentage of total of the top 30% – Portugal

| Theme | % of top 30% |
|---|---------------------|
| material want / underdevelopment | 10.4 |
| material incompetence / incapacity | 10.2 |
| (non specified) agriculture | 9.6 |
| non mechanized / subsistence agriculture | 7.7 |
| Past | 7.2 |
| community / gemeinschaft | 5.4 |
| (social) change - residual: absence / slow | 5.2 |
| (social) change - residual | 5.1 |
| disregard for law, rules, institutions | 5.0 |
| superstition and absence / low level of rationality / reflection / precision | 4.4 |
| “tradition” and “traditional” customs / rituals | 4.4 |
| Emigration | 4.3 |
| self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market | 3.6 |
| soberness / restraint / “conservatism” | 3.5 |
| modern technology | 3.4 |
| isolation / absence of cosmopolitanism | 2.9 |
| modesty / low self-esteem | 2.6 |
| material competence / capacity: capacity to organize resources / efficiency / diligence / competence / knowledge / infrastructure | 2.5 |
| gender differentiation | 2.5 |

reader assumes that for a large number of readers the effects of different individual perception structures somehow cancel themselves out. In such a context, the intensity indicator could be afforded some likelihood.

As in the above external analysis (which was performed in terms of absolute number of themes) this internal analysis shows that the first four themes with highest percentage of total density of extension (which account in this case for 38% of the total) regard production and the material situation. As with the analysis of the number of themes, if one takes out from this group the theme (*non specified*) *agriculture*, 28.3% of the themes convey a picture of a country with insufficiencies in material terms, to which *self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market* could be added as it was argued in the external analysis⁵⁵⁰. Given that these percentages of 38% and 28.3% compare with analogous indicators of 40% and 30%, respectively in the external analysis, one concludes that there is no basic difference between the internal and external perspectives in what regards material situation pertaining Portugal. Also as in the external analysis, of the themes that contradict this picture, *modern technology* is located in the second half of the rank, although in higher position. Once more, possibly related to this disadvantaged material position is the phenomenon of *emigration*.

The picture of pre-modernity conveyed in the external analysis is confirmed in terms of density of extension and accounts for 30% of the total. This indicator is slightly higher than the equivalent indicator in the internal analysis due to the inclusion of the theme *gender differentiation*, not present in the external analysis. Also as in the external analysis, the themes (*social*) *change (residual category)* and (*social*) *change - residual: absence / slow* roughly cancel out each other⁵⁵¹, while *disregard for law, rules and institutions* shows a slight reduction when comparing to what happens in the external analysis (from 6.1% to 5.0%). As firstly discussed in the context of the external analysis, the association of *disregard for law...* with a picture of pre-modernity is not straightforward).

Finally, the theme *soberness / restraint / "conservatism"* (also not present in the top 30% themes of the external analysis) could be associated with pre-modernity in as much as the qualities, attitudes or behaviours which comprise it are deemed connected with a society with a low level of change or no change at all⁵⁵². This inclusion (vis-à-vis the external analysis) in the

⁵⁵⁰ For a discussion of the theme *self-sufficiency...* as an indicator of material want and the difference vis-à-vis the theme *non mechanized / subsistence agriculture* in this regard see footnote footnote 544, on page 301 above.

⁵⁵¹ As argued above, this entails the simplification of erasing a representation with its contrary, when a society of course can accommodate opposites. However, the picture of pre-modernity is not significantly eroded even when the cancellation is not considered.

⁵⁵² It could be the case, of course, that this picture stems from observations authors made of people or group showing these qualities, attitudes or behaviours as reaction to a society with a *rapid* pace of transformation or it could even be the case that the picture stems from observations of a mix of both types of situations. For this reason, only an analysis of all the images that gave rise to this theme and, namely, of the corresponding degrees of generality, would allow us to present the picture as associated with pre-modernity. Given this theme is not very significant (it ranks

top 30% is accompanied by the elimination of the theme *health - problems / damaging behaviours*. The following table shows the results for Spain.

Table B.23 - Density of extension per theme of each of the top 30% as percentage of total of the top 30% – Spain

| Theme | % of top 30% |
|---|---------------------|
| (social) change - residual | 8.8 |
| material incompetence / incapacity | 6.1 |
| disregard for law, rules, institutions | 6.1 |
| conflict / violence / aggressiveness / rudeness / absence of integration | 5.1 |
| intolerance / intransigence / prejudice / discrimination | 4.1 |
| “tradition” and “traditional” customs / rituals | 3.3 |
| religion - importance | 3.9 |
| community / gemeinschaft | 3.6 |
| superstition and absence / low level of rationality / reflection / precision | 3.4 |
| material want / underdevelopment | 2.4 |
| gender differentiation | 2.3 |
| self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market | 2.3 |
| excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude | 1.9 |
| (non specified) agriculture | 2.3 |
| non mechanized / subsistence agriculture | 1.9 |
| development / material prosperity | 2.1 |
| material competence / capacity: capacity to organize resources / efficiency / diligence / competence / knowledge / infrastructure | 1.7 |
| health - problems / damaging behaviours | 1.9 |
| anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium | 2.0 |
| leisure (practice) | 1.6 |
| soberness / restraint / “conservatism” | 1.7 |
| liberal mores / liberalization of mores | 1.5 |

Spain still shows up as somewhat disadvantaged country in material terms in the themes *material incompetence / incapacity*, *material want / underdevelopment*, and *non mechanized /*

13th with 3.9 of the top 30% theme) and that the picture pre-modernity is already solidly established, it does not seem relevant to perform such analysis.

subsistence agriculture, comprising a total of 10.4%⁵⁵³, which is lower than the corresponding value of the external analysis (19%). On the other hand, the themes showing material sufficiency (now *development / material prosperity* and *material competence / capacity*) comprise only 3.8% of the total extension of the top 30% themes (down from 12%, mostly due to the absence of the theme *industrialized production / mass market and modern technology*, which was present in the internal analysis). Overall, one sees no significant change to the depiction of material insufficiency of the external analysis⁵⁵⁴.

The table below summarizes the differences between Portugal and Spain in the internal and external analysis, assuming that one can add the percentages of themes that indicate material insufficiency and can subtract those which indicate the contrary⁵⁵⁵. The position of Portugal is more disadvantaged than that of Spain both in external and internal analysis (columns a and b), but the difference is lower in the internal analysis.

⁵⁵³ As has been the case in the external and internal above analysis of themes, both in terms of absolute numbers and density of extension, *self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market* could be added to this picture of material insufficiency. For a discussion of the theme *self-sufficiency...* as an indicator of material want and the difference vis-à-vis the theme *non mechanized / subsistence agriculture* in this regard see footnote 544, on page 301 above.

⁵⁵⁴ Once more, as discussed above, this entails conflating and then diluting different positions along an axis, instead of seeing them as different attributes of a society (e.g. of different parts of the society), but here, too, even if one does not consider the two themes opposing the representation of Spain as disadvantaged country in material terms, 15% of total density of extension still point to that.

⁵⁵⁵ This is the premise assumed and discussed in footnote 510, on page 301.

Table B.24 – Material insufficiency: Portugal versus Spain and external versus internal analysis (% of images of the social world)

| analysis country / | Portugal | Spain | | | Difference Portugal - Spain (a - d) |
|--------------------------------------|-----------------------|---|---|-----------------------|-------------------------------------|
| | net insufficiency (a) | themes showing material insufficiency (b) | themes showing material sufficiency (c) | net insufficiency (d) | |
| external (e) | 30 | 19 | 12 | 7 | 23 |
| internal (f) | 24.9 ¹ | 10.4 | 3.8 | 6.6 | 18.3 |
| difference internal - external (f-e) | -5.1 | -8.6 | -8.2 | -0.4 | -4.7 |

1 - This is the total for themes showing material insufficiency subtracted of the theme modern technology.

Proceeding with the internal analysis of Spain's top 30% themes, one observes that similarly to the external analysis, in the internal analysis Spain is also pictured as pre-modern in the themes *tradition and "traditional" customs / rituals, self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market, non mechanized / subsistence agriculture, community / gemeinschaft, superstition and absence / low level of rationality / reflection / precision, gender differentiation and non mechanized / subsistence agriculture*. The sum of their percentages (24.6%) hardly changes in relation to the external analysis, where this indicator was 23.2%. As in the external analysis, the pre-modernity cluster of themes is opposed by the importance of *(social) change*, here even more salient as the most important theme for Spain, with a percentage of 12.6 (increased from the 10% of the internal analysis) and also by the theme *liberal mores / liberalization of mores* (2.1%), which was not present in the external analysis of the top 30% themes.

Once more considering that religion – quite important in Spain and not in Portugal – is not taken as an indicator of pre-modern society (as detailed in the discussion of this concept in the methodology chapter), Spain is, from the internal point of view, represented as a more

modern country (or, more precisely, as less pre-modern country) than Portugal and this difference has increased in the move from the external to the internal analysis, as detailed in the table below, which was built on the same principles of summing and subtracting the percentages of groups of themes as in Table B.22, above⁵⁵⁶. This can be affirmed because, as argued above, the internal analysis allows the use of neutralization / mitigation operations between themes, so that when comparing Portugal and Spain one can consider the difference “a – d” in Table B.23. On the other hand, when neutralization / mitigation operations are not considered one can still see a difference between Portugal (28%) and Spain (23.2%), as referred above. If these operations are permitted a very significant difference of 18 percentage points is found.

Table B.25 – Premodernity and modernity: Portugal versus Spain and external versus internal analysis

| analysis / country | Portugal | Spain | | | Difference Portugal - Spain (a - d) |
|--------------------------------------|-------------------------------------|-------------------------------------|---------------------------------|-----------------------|-------------------------------------|
| | themes indicating pre-modernity (a) | themes indicating pre-modernity (b) | themes indicating modernity (c) | net pre-modernity (d) | |
| external (e) | 28 | 23.2 | 10 | 13.2 | 14.8 |
| internal (f) | 30 | 24.6 | 12.6 | 12 | 18 |
| difference internal - external (f-e) | 2 | 1.4 | 2.6 | -1.2 | 3.2 |

The theme *disregard for law, rules and institutions* (whose ambiguity vis-à-vis the pair modern / pre-modern society prevent it being associated in a straightforwardly to any of the components of this pair, as argued above) does not change considerably its significance in the move from the external (Table B.22) to the internal analysis. The cluster that includes that theme

⁵⁵⁶ In the case of the external analysis of Portugal, as detailed above, besides the theme (*social*) *change – residual*, there are no themes that may imply (social) change, and this theme (with 4.7 % of total themes) is neutralized by the its opposite, which shows a very identical percentage of total number of themes. For this reason, these themes opposing pre-modernity do not show up in Table B.25. Something similar occurs in the external analysis of Portugal: the themes (*social*) *change – residual* and (*social*) *change - residual: absence / slow* roughly cancel out each other, the reason why they also do not show up in the same table.

and the other themes representing lack of social harmony in the external analysis⁵⁵⁷ reach now a significant 27.6% of the total. This increase vis-à-vis the external analysis (23.2%) maintains the representation of Spain as a less socially harmonious country (in general and comparing to Portugal, which shows no themes on this dimension of social harmony).

At the same time, the internal analysis sees the entry of *non mechanized / subsistence agriculture, leisure (practice), liberal mores / liberalization of mores and soberness / restraint / "conservatism"* (in exchange for *(non specified) agriculture, modern technology and industrialized production / mass market*) into the group of the top 30% most significant themes. As cautioned above in footnote 544 (page 302), giving the nature of the axis to which they belong, the latter two cannot neutralize each other: rather, they make the representation of Spain more extreme, which can up to some point be associated with representation of Spain as a less socially harmonious society.

B.8 – Focused analysis (excluding authors focused on specific subsets of otherness)

Regarding the books on Portugal, *Uma Casa em Portugal* and *Trás-os-Montes* take place in specific types of settings (the village of Eugaria, in the first case, and the region that gives name to the book, in the second), while in the other works the authors have contact with broader spaces. It could be argued, therefore, that Hewitt and Llamazares' portraits are necessarily different from those presented by their colleagues: they tend to reflect the social worlds of a small community, on one side, and, on the other, a region where, as noted at the beginning of section 4.4, where agriculture is much more important than for the whole of Portugal. Similar reasoning applies to the books on Spain, in as much as Richard Stewart and Camilo Jose Cela limit their stays and/or travels to regions that, as with Hewitt's Eugaria and Llamazares' Trás-os-Montes, are mostly rural.⁵⁵⁸ (Franck Arencibia, despite being located in Madrid, pays attention to the whole of Spain through the media and other sources of indirect information, his percentage of use of indirect information being 25.76% of the total of sources of knowledge of the social world he uses and his level of generality being the highest in the corpus, at 2.90).

⁵⁵⁷ These themes did not suffer significant changes in their percentages of the total in the move from the external to the internal analysis. They are *conflict / violence / aggressiveness / rudeness / absence of integration; intolerance / intransigence / prejudice / discrimination, excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude; and anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium.*

⁵⁵⁸ The meaning of rural is taken here as non-urbanized areas, with low population density and where much of the land is devoted to agriculture.

It should be noted that the fact that an author is centred on a region or even in a smaller area does not necessarily implies that her/his images refer only to that area (as the analysis of *Uma casa em Portugal* in section 4.3 shows). It is supposed, however, that the world an author contacts with is the main source of the information about the social world s/he conveys in his book. The validity of this premise is questioned the more an author resorts to indirect information as source of knowledge (albeit not necessarily, as one author can use indirect information *regarding only the area s/he has contact with* and not other areas). Considering the shares of use of this type of source in the total use of sources of knowledge for the authors now being excluded – they are 7.07% (*Uma casa*), 1.37% (*Trás-os-Montes*), 0.00% (*Driving over Lemons*) and 1.99% (*Nuevo viaje a la Alcarria*) – one concludes that the validity of the premise seems sound and that, therefore, there is ground for the exclusions.

Thus, if one wants to consider the global images respectively of Portugal and Spain, one should add to the above analysis an analysis excluding the works which focus on specific regions. This is performed following a methodology similar to the one adopted above, namely by considering the top (roughly) 30% most relevant themes.⁵⁵⁹ The results for these focused analyses are shown, for Portugal, in the table below, which considers the top 32.2% themes in terms of extension, which account for 70.0%.

The table below presents, for Spain, the top 24.6 % themes in terms of extension, which account for 70% of total.

Table B.26 – Density of extension per theme of each of the top 30% as percentage of total of the top 30% – Portugal excluding *Uma Casa em Portugal* and *Trás-os-Montes*

| Theme | % of top 30% |
|---|---------------------|
| non mechanized / subsistence agriculture | 9.6 |
| material want / underdevelopment | 8.6 |
| material incompetence / incapacity | 8.0 |
| soberness / restraint / “conservatism” | 7.7 |
| community / gemeinschaft | 7.2 |
| “tradition” and “traditional” customs / rituals | 6.1 |
| (social) change - residual | 5.3 |

⁵⁵⁹ Only an internal analysis is be performed (that is, an analysis in terms of intensity) on the grounds that the act of excluding some works – based on the awareness that those works regard specific regions and not the whole countries of Portugal or Spain – necessarily entails assuming an internal point of view (that is, the point of view of the scholar rather than the reader).

| | |
|---|-----|
| past | 5.1 |
| authenticity | 5.1 |
| gender differentiation | 4.8 |
| modesty / low self-esteem | 4.4 |
| (non specified) agriculture | 4.4 |
| self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market | 4.4 |
| rationality / reflection / precision - absence / low level and superstition | 3.9 |
| disregard for law, rules, institutions | 3.6 |
| anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium | 3.1 |
| religion - importance | 2.9 |
| ethnic minorities | 2.9 |
| emigration | 2.7 |

As in the extended analysis, in the focused analysis the themes which regard production and the material situation comprise a significant percentage of the total (30.6% against 38% in the extended analysis), these themes being *non mechanized / subsistence agriculture; material incompetence / incapacity; and self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market*.

Interestingly given two works centred on the rural world are now excluded, the theme *modern technology* is no longer present amongst these top (roughly) 30% themes. Thus, to work out the percentage of net insufficiency (concept which was discussed above in the extended analysis) one does not have to subtract the percentage of *modern technology* (nor of any other theme, given no other theme is indicator of sufficiency). For this reason, the percentage of net insufficiency corresponds to the accumulated percentage of the just mentioned themes which regard production and the material situation (but, as in the extended analysis, not considering *(non specified) agriculture*). Net insufficiency is therefore now 26.2%, which compares with 24.9% (as per Table B.24, above).⁵⁶⁰ Therefore, there is no basic difference between the extended and the focused analysis in what regards material situation.

As in the extended analysis, the phenomenon of *emigration* could be associated with this disadvantaged material position. On the other hand, the picture of “absolute” pre-modernity (which opposes “net” pre-modernity) conveyed in the extended analysis is strongly reinforced,

⁵⁶⁰ It should be noted that, as argued in the extended analysis, the theme *self-sufficiency*... is not considered an indicator of material want, thus not entering in the calculation of net insufficiency.

changing from for 30% to 46.2%⁵⁶¹ of the total. This is due to the inclusion amongst the top 30% of the theme *authenticity* (which adds 5.1%), but also to increases in the percentages of all other themes except two have suffered reductions: *past* (-2.10 percentage points) and *rationality / reflection / precision - absence / low level and superstition* (-0.50 percentage points). When considering the theme *(social) change – residual* (5.3%), one can see that the value for net pre-modernity, at 40.9% is still much higher than the corresponding indicator in the extended analysis (30%). This is another unexpected result contradicting the rationale that justified the limited analysis in the first place.

Another difference is the reinforcement of three themes conveying personal / psychological attributes. While this group accounted for 6.1% of the total, now it includes *soberness / restraint / “conservatism”* (more than doubling its percentage, to 7.7% of the total top 30% themes); *modesty / low self-esteem* (significant increase from 2.6% to 4.4%) and *anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium* (a new inclusion, with 3.1%). It could be argued that these first two themes are associated with traditional society in as much as these qualities and/or attitudes oppose the stronger affirmation of the individual in modern society; at the same the negative states of the third theme of the group could be associated with alienation of the modern society (or even post-modern, depending on the definition). Even if these (somehow speculative) arguments are not accepted, the clear result mentioned in the previous paragraph regarding the strength of traditional society in the images of Portugal conveyed by Hyland and Proper (the authors on Portugal who travel the whole country, in opposition to their colleagues focusing in the village in Sintra and in *Trás-os-Montes*) is not affected.

Table B.27 – Density of extension per theme of each of the top 25% as percentage of total of the top 25%⁵⁶² – Spain – excluding *Driving Over Lemons* and *Nuevo viaje a la Alcarria*.

| Theme | % of top 25% |
|------------------------------------|--------------|
| material incompetence / incapacity | 8.3 |

⁵⁶¹ This was worked out by considering the themes non mechanized / subsistence agriculture; community / *gemeinschaft*; “tradition” and “traditional” customs / rituals; past; authenticity; gender differentiation; self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market; and rationality / reflection / precision - absence / low level and superstition.

⁵⁶² Top 24.6% themes comprise 70% of total density of extension for the reduced group.

| | |
|---|-----|
| disregard for law, rules, institutions | 7.7 |
| conflict / violence / aggressiveness / rudeness / absence of integration | 7.4 |
| intolerance / intransigence / prejudice / discrimination | 5.8 |
| (social) change - residual | 5.5 |
| superstition and absence / low level of rationality / reflection / precision | 4.6 |
| religion - importance | 4.4 |
| excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude | 3.4 |
| “tradition” and “traditional” customs / rituals | 2.7 |
| health - problems / damaging behaviours | 2.7 |
| material want / underdevelopment | 2.6 |
| gender differentiation | 2.4 |
| anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium | 2.3 |
| leisure (practice) | 2.2 |
| soberness / restraint / “conservatism” | 2.1 |
| liberal mores / liberalization of mores | 2.1 |
| community / gemeinschaft | 1.8 |
| sexuality / eroticism | 1.8 |

As in the extended analysis, Spain still shows up as somewhat disadvantaged country in material terms (10.9% of the total, a very slight increase from 10.4%), but now only in the themes *material incompetence / incapacity*, *material want / underdevelopment*, given *non mechanized / subsistence agriculture*, has been excluded⁵⁶³.

Considering that the themes *development / material prosperity*, *material competence / capacity* (which accounted for 3.8% in the extended analysis) are no longer present, one sees a slight intensification in the net insufficiency when comparing the extended with the focused analysis. As it happened with the books on Portugal, this is once more an unexpected result that contradicts the expected of the presence of real worlds on the writings of the authors under study.

Table B.28 below summarizes the differences between Portugal and Spain in the internal and external analysis, assuming that one can add the percentages of themes that indicate material

⁵⁶³ As has been the case in the external and internal above analysis of themes, both in terms of absolute numbers and density of extension, *self-sufficiency / non-industrialized production / absence of specialization in production / absence of mass market* could be added to this picture of material insufficiency. For a discussion of the theme *self-sufficiency...* as an indicator of material want and the difference vis-à-vis the theme *non-mechanized / subsistence agriculture* in this regard see footnote 431, on page 307 above.

insufficiency and can subtract those which indicate the contrary⁵⁶⁴. The position of Portugal is more disadvantaged than that of Spain both in extended and focused analysis (columns a and b), but the difference is lower in the focused analysis, reaching only 3 percentage points. This is due to the increase in Spain's net insufficiency (given Portugal's net insufficiency has also increased, albeit quite less).

Table B.28 – Material insufficiency: Portugal versus Spain and extended versus focused analysis (density of extension)

| analysis / country | Portugal | Spain | | | Difference Portugal - Spain (a - d) |
|-------------------------------------|-----------------------|---|---|-----------------------|-------------------------------------|
| | net insufficiency (a) | themes showing material insufficiency (b) | themes showing material sufficiency (c) | net insufficiency (d) | |
| extended (f) | 24.9 ¹ | 10.4 | 3.8 | 6.6 | 18.3 |
| focused (f) | 26.2 | 10.9 | 0.0 | 10.9 | 15.3 |
| difference focused - extended (f-e) | 1.3 | 0.5 | -3.8 | 4.3 | |

1 - This is the total for themes showing material insufficiency subtracted of the theme modern technology

Proceeding with the focused analysis of Spain's top 30% themes, one observes that similarly Spain is pictured as pre-modern in the themes in a total of 11.5%, in the themes *superstition and absence / low level of rationality / reflection / precision; tradition and "traditional" customs / rituals; gender differentiation and community / gemeinschaft*. This value is much lower – less than half – than the corresponding value in the extended analysis (24.6%) and opposed by *(social) change – residual and liberal mores / liberalization of mores* (comprising 7.6%), consequently reducing net pre-modernity to just 3.9%, meaning that Spain is

⁵⁶⁴ This is the premise assumed and discussed in footnote 545, on page 301.

now depicted as an almost neutral country in terms of the pair traditional / modern. Adding to this the fact that Portugal has seen his image of pre-modernity very much reinforced, one sees a very high increase in the difference between Portugal and Spain within this axis, as detailed in the table below, which was built on the same principles of summing and subtracting the percentages of groups of themes as in Table B.24.

In the move from the extended to the focused analysis, the group of the top 30% themes has suffered a reduction from 22 themes to 19. The four themes excluded (none was included anew) are: *(non specified) agriculture; self-sufficiency / non industrialized production / absence of specialization in production / absence of mass market; non mechanized / subsistence agriculture; development / material prosperity*. They correspond to what would have been expected given that the focused analysis, as detailed above, excludes two works centred on mainly rural regions.

Table B.29 – Premodernity and modernity: Portugal versus Spain and extended versus focused analysis (density of extension)

| analysis / country | Portugal | | | Spain | | | Difference Portugal - Spain (c - f) |
|-------------------------------------|-------------------------------------|---------------------------------|-----------------------------|-------------------------------------|---------------------------------|-----------------------------|-------------------------------------|
| | themes indicating pre-modernity (a) | themes indicating modernity (b) | net pre-modernity (c) (a-b) | themes indicating pre-modernity (d) | themes indicating modernity (e) | net pre-modernity (f) (d-e) | |
| extended (g) | 30.0 | 0.0 | 30.0 | 24.6 | 12.6 | 12.0 | 18.0 |
| focused (h) | 46.2 | 5.3 | 40.9 | 11.5 | 7.6 | 3.9 | 37.0 |
| difference focused - extended (h-g) | 16.2 | 5.3 | 10.9 | -13.1 | -5.0 | -8.1 | 19.0 |

B.9 – The negativeness of the social worlds of Iberia

Table B.30 – Positive, negative and neutral themes in the images of the social world

| work * | - | + | 0 | % in work | | | | (+)(-) | (+)(-) per 10,000 words | % of the average |
|------------------------------|-----|----|-----|-----------|-----------|------------------------|-----------|--------|----------------------------------|------------------------|
| | | | | % of - | % of + | (% of -) / (% of +) | % of 0 | | | |
| 8 | 143 | 11 | 51 | 69.8 | 5.4 | 13.0 | 24.9 | -132 | -13.1 | 332.6 |
| 7 | 56 | 12 | 119 | 29.9 | 6.4 | 4.7 | 63.6 | -44 | -5.7 | 145.1 |
| 1 | 49 | 12 | 33 | 52.1 | 12.8 | 4.1 | 35.1 | -37 | -4.8 | 122.6 |
| 3 | 45 | 5 | 100 | 30.0 | 3.3 | 9.0 | 66.7 | -40 | -4.1 | 103.3 |
| 2 | 22 | 5 | 117 | 15.3 | 3.5 | 4.4 | 81.3 | -17 | -2.5 | 63.6 |
| 4 | 29 | 13 | 98 | 20.7 | 9.3 | 2.2 | 70.0 | -16 | -2.2 | 54.7 |
| 9 | 21 | 10 | 141 | 12.2 | 5.8 | 2.1 | 82.0 | -11 | -1.6 | 41.3 |
| 6 | 20 | 12 | 41 | 27.4 | 16.4 | 1.7 | 56.2 | -8 | -0.9 | 23.4 |
| 5 | 23 | 19 | 66 | 21.3 | 17.6 | 1.2 | 61.1 | -4 | -0.5 | 13.3 |
| total | 408 | 99 | 766 | 32.1 | 7.8 | 4.1 | 60.2 | -309 | -4.3 | |
| average | | | | | | | | | -3.9 | |
| average for Anglo-Saxons (a) | | | | | | | | | -4.5 | |
| average for Spanish (b) | | | | | | | | | -2.1 | |
| a / b | | | | | | | | | 2.143 | |

* - The numbers 1-8 in this column indicate the works of the corpus as follows: *Uma Casa em Portugal*; *Trás-os-Montes*; *Backwards Out of the Big World*; *The last old place*; *Driving Over Lemons*; *It's not about the tapas*; *Don Quixote's Delusions*; *Spain*; *Nuevo viaje a la Alcarria*. They also apply below.

All authors present considerably higher shares of negative themes than positive ones, the ratio between these shares varying between 1.2 times and 13 times, with the value for the whole of the corpus at 4.1. Considering the difference between the number of negative themes and the number of positive themes (third column from the right) in terms of densities (second column from the right) one sees (last column) that Franck Arencibia clearly stands out from the other works, at 333% of the average, followed by Miranda France, Richard Hewitt (more than 20% above the average) and Paul Hyland (near the average), with all other authors are fairly far from it.

The following table shows the same results considering densities of extension. Thus, columns 2-4 contain the number of themes of each type (negative, positive or neutral) multiplied by the degree of generality of the image underlying each theme (1,2 or 3).

Table B.31 – Positive, negative and neutral themes in the images of the social world (density of extension)

| work | - | + | 0 | % in work | | | | (+) - (-) | (+) - (-) per 10,000 words | % of the average |
|------------------------------|-----|-----|------|-----------|--------|---------------------|--------|-----------|----------------------------|------------------|
| | | | | % of - | % of + | (% of -) / (% of +) | % of 0 | | | |
| 8 | 418 | 29 | 148 | 70.3 | 4.9 | 14.4 | 24.9 | -389 | -38.7 | 412.0 |
| 7 | 131 | 29 | 305 | 28.2 | 6.2 | 4.5 | 65.6 | -102 | -13.3 | 141.4 |
| 1 | 99 | 27 | 66 | 51.6 | 14.1 | 3.7 | 34.4 | -72 | -9.4 | 100.2 |
| 3 | 85 | 10 | 175 | 31.5 | 3.7 | 8.5 | 64.8 | -75 | -7.6 | 81.4 |
| 2 | 40 | 10 | 194 | 16.4 | 4.1 | 4.0 | 79.5 | -30 | -4.4 | 47.2 |
| 4 | 48 | 19 | 252 | 15.0 | 6.0 | 2.5 | 79.0 | -29 | -4.3 | 45.8 |
| 9 | 64 | 37 | 202 | 21.1 | 12.2 | 1.7 | 66.7 | -27 | -3.6 | 38.8 |
| 6 | 35 | 21 | 95 | 23.2 | 13.9 | 1.7 | 62.9 | -14 | -1.8 | 19.6 |
| 5 | 44 | 33 | 90 | 26.3 | 19.8 | 1.3 | 53.9 | -11 | -1.3 | 13.5 |
| total | 964 | 215 | 1527 | 35.6 | 7.9 | 4.5 | 56.4 | -749 | -10.3 | |
| average | | | | | | | | | -9.4 | |
| average for Anglo-Saxons (a) | | | | | | | | | -10.9 | |
| average for Spanish (b) | | | | | | | | | -4 | |
| a / b | | | | | | | | | 2.725 | |

For all authors, the percentage of negatives in the total of each work still clearly dominates positives. The order of the rank does not change much, with Arencibia increasing his distance vis-à-vis his colleagues of the corpus (last column), as expected given his highest degree of generality, and Proper changing positions with Cela and Stewart changing positions with Evans.

Given the extreme negativity of Franck Arencibia (an author who shows in his writing mechanisms denoting negative prejudice, as it can be seen in the corresponding section of the next chapter), the following tables present negativity excluding this author.

Table B.32a – Negativeness (absolute figures) excluding Franck Arencibia's *Spain*

| work | (+)-(-) per 10,000 words | % of the average |
|------------------------------|--------------------------|------------------|
| 7 | -5.7 | 204 |
| 1 | -4.8 | 171 |
| 3 | -4.1 | 146 |
| 2 | -2.5 | 89 |
| 4 | -2.2 | 79 |
| 9 | -1.6 | 57 |
| 6 | -0.9 | 32 |
| 5 | -0.5 | 18 |
| average | -2.8 | |
| average for Anglo-Saxons (a) | -3 | |
| average for Spanish (b) | -2.1 | |
| a / b | 1.429 | |

Table B.32b – Negativeness (density of extension) excluding Franck Arencibia's *Spain*

| work | (+)-(-) per 10,000 words | % of the average |
|------------------------------|--------------------------|------------------|
| 7 | -13.3 | 233 |
| 1 | -9.4 | 165 |
| 3 | -7.6 | 133 |
| 2 | -4.4 | 77 |
| 4 | -4.3 | 75 |
| 9 | -3.6 | 63 |
| 6 | -1.8 | 32 |
| 5 | -1.3 | 23 |
| average | -5.7 | |
| average for Anglo-Saxons (a) | -6.3 | |
| average for Spanish (b) | -4.0 | |
| a / b | 1.575 | |

The table below, presents negativeness by country, considering the works on Portugal and the works on Spain⁵⁶⁵.

⁵⁶⁵ Given that 7 images of the social world images on Spain show up on books on Portugal, there is the possibility of an error occurring in calculation here. However, this set of images is only 0.54% of the 1,294 images of the social world in the corpus, so the maximum possible error (which happens in case all these images are universals) is very low and in no way changes significantly the results.

Table B.33 – Positive, negative and neutral themes by country (absolute figures)

| country | - | + | 0 | % in country | | | (+)–(-) | (+)–(-) per 10,000 words |
|---------------------------------|-----|----|-----|--------------|------|------|---------|-----------------------------------|
| | | | | - | + | 0 | | |
| Portugal | 145 | 35 | 348 | 27.5 | 6.6 | 65.9 | -110 | -3.5 |
| Spain | 263 | 64 | 418 | 35.3 | 8.6 | 56.1 | -199 | -4.9 |
| total | 408 | 99 | 766 | 32.1 | 7.8 | 60.2 | -309 | -4.3 |
| Spain excluding Arencibia | 119 | 55 | 267 | 27.0 | 12.5 | 60.5 | -64 | -2.1 |

Contrary to what happens with the compared analysis of material insufficiency (Table B.24, on page 311 above), where Portugal is shown as more disadvantaged, here is Spain the country which is deemed more negative, with a value of -4.9 in what regards the difference between the number of positive themes and the number of negative themes in terms of density, a negativeness index 40% higher than that for Portugal, at 3.5. Still, if one excludes Franck Arencibia from the analysis – which can be justified on the grounds that he is extremely negative (more than 4 times the average of the corpus, as can be seen above) and that he is prejudiced in his rhetorical mechanisms (section 4.9) – one sees that shows a negativeness which is 60% of that of Portugal.

The difference is very much widened when the degree of generality is considered, as can be seen on the table below. Spain's difference between the number of positive themes and the number of negative themes in terms of extension is now -13.4, that is, a negativeness index which is roughly the double of the negativeness for Portugal. However, if again Franck Arencibia is excluded, the intensity of negativeness for Spain becomes half than less than that for Portugal.

Table B.34 – Positive, negative and neutral themes by country (density of extension)

| country | - | + | 0 | % in country | | | (+) - (-) | (+) - (-) per 10,000 words |
|------------------------------|-----|-----|------|--------------|------|-------|--------------|-------------------------------------|
| | | | | - | + | 0 | | |
| Portugal | 288 | 84 | 637 | 28.5 | 8.3 | 63.1 | -204 | -6.4 |
| Spain | 676 | 131 | 890 | 39.8 | 7.7 | 52.4 | -545 | -13.4 |
| total | 964 | 215 | 1527 | 35.6 | 7.9 | 56.4 | -749 | -10.3 |
| Spain excluding F. Arencibia | 258 | 102 | 742 | 23.41 | 9.26 | 67.33 | -156 | -2.5 |

Focused analyses: the negativeness of the social worlds of Iberia excluding specific regions

In order to consider the global images respectively of Portugal and Spain, one should add to the above analysis an analysis excluding the works which focus on specific regions. This means excluding *Uma casa em Portugal* and *Trás-os-Montes*, in the case of Portugal and, in the case of Spain, excluding *Driving Over Lemons* and *Nuevo viaje a la Alcarria*. The results are presented in the following tables.

Table B.35 – Positive and negative themes by country excluding *Uma casa em Portugal*, *Trás-os-Montes*, *Driving Over Lemons* and *Nuevo viaje a la Alcarria*

| country | - | + | 0 | % in country | | | (+) - (-) | (+) - (-) per 10,000 words |
|----------|-----|-----|------|--------------|-----|------|-----------|-------------------------------------|
| | | | | - | + | 0 | | |
| Portugal | 482 | 117 | 964 | 30.8 | 7.5 | 61.7 | -365 | -21.2 |
| Spain | 219 | 35 | 211 | 47.1 | 7.5 | 45.4 | -184 | -7.0 |
| total | 701 | 152 | 1175 | 34.6 | 7.5 | 57.9 | -549 | -12.8 |

For the whole subset of the corpus now being analysed, the density of negativeness (that is, the difference between positives and negatives) has increased 3 times (last column, last line), although this growth has been unevenly distributed between countries (last columns): while Spain saw an increase of 40%, in the case of Portugal the value of negativeness has increased a little more than six times, making this country clearly the one with the most negative view.

As can be seen in the table below, a very similar situation occurs when the same subset of the corpus is considered in terms of extension. There has been an overall multiplication by three

of the negativeness, with Portugal getting most of such increase and featuring the most negative view by far.

Table B.36 – Positive and negative themes by country excluding *Uma casa em Portugal*, *Trás-os-Montes*, *Driving Over Lemons* and *Nuevo viaje a la Alcarria* – density of extension

| country | - (extension) | + (extension) | 0 (extension) | % in country | | | (+)–(-) | (+)–(-) per 10,000 words |
|----------|------------------|------------------|------------------|--------------|-----|------|---------|-----------------------------------|
| | | | | - | + | 0 | | |
| Portugal | 1.113 | 262 | 1.904 | 33.9 | 8.0 | 58.1 | -851 | -49.4 |
| Spain | 593 | 91 | 543 | 48.3 | 7.4 | 44.3 | -502 | -19.0 |
| total | 1.706 | 353 | 2.447 | 37.9 | 7.8 | 54.3 | -1353 | -31.5 |

The negativeness of Frank Arencibia's *Spain*

This author's extreme negativeness is confirmed by a systematic analysis of the themes contained in Arencibia's images of the Spanish social world, which are shown in the table below, in terms of densities (that is, per 100,000 words of text). In the second column (*% in Spain*) one finds the number of cases of each theme divided by the total cases of themes in the book, while the fourth column (*% in corpus*) contains the division of the number of cases of each theme by the total number of cases of such theme in the corpus. The last column compares the density of each theme in Arencibia, on one side, with the total density of each theme in the corpus divided by nine, on the other, allowing us to see how much the American author is above or below such theoretical average for each theme.

Table B.37 - Distribution of images by themes for *Paradox* (densities)

| Theme | % in <i>Spain</i> | accum. % | % in corpus | % of theoretical average |
|---|----------------------|-------------|----------------|--------------------------------|
| Total | 100.0 | - | 13 | 114 |
| material incompetence / incapacity | 15.6 | 16 | 35 | 312 |
| conflict / violence / aggressiveness / rudeness / absence of integration | 11.2 | 27 | 49 | 439 |
| disregard for law, rules, institutions | 10.7 | 38 | 26 | 232 |
| intolerance / intransigence / prejudice / discrimination | 9.8 | 47 | 55 | 490 |

| | | | | |
|---|-----|-----|-----|-----|
| rationality / reflection / precision - absence / low level and superstition | 7.3 | 55 | 23 | 205 |
| health - problems / damaging behaviours | 5.4 | 60 | 40 | 356 |
| material want / underdevelopment | 3.9 | 64 | 12 | 109 |
| excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude | 3.4 | 67 | 33 | 300 |
| gender differentiation | 2.4 | 70 | 14 | 127 |
| “tradition” and “traditional” customs / rituals | 2.0 | 72 | 7 | 64 |
| anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium | 2.0 | 74 | 20 | 179 |
| liberal mores / liberalization of mores | 2.0 | 76 | 33 | 298 |
| material competence / capacity | 2.0 | 78 | 10 | 86 |
| otherness of otherness | 2.0 | 80 | 37 | 329 |
| soberness / restraint / “conservatism” | 2.0 | 82 | 15 | 136 |
| (social) change – residual | 1.5 | 83 | 3 | 29 |
| affective / particular - importance / predominance (over instrumental / universal) | 1.5 | 84 | 16 | 144 |
| development / material prosperity | 1.5 | 86 | 15 | 134 |
| leisure (practice) | 1.5 | 87 | 21 | 185 |
| “cultural identity” - absence / low level / decay | 1.0 | 88 | 100 | 900 |
| “underdevelopment” / “Third World” | 1.0 | 89 | 25 | 224 |
| arrogance / pride | 1.0 | 90 | 46 | 411 |
| egotism / egocentrism / greed / envy | 1.0 | 91 | 60 | 544 |
| modesty / low self-esteem | 1.0 | 92 | 20 | 177 |
| satisfaction / peacefulness / fulfilment / happiness | 1.0 | 93 | 18 | 160 |
| (social) change - residual: absence / slow | 0.5 | 94 | 4 | 39 |
| (well-functioning) democracy | 0.5 | 94 | 100 | 900 |
| affective incompetence / incapacity, coldness / insensibility | 0.5 | 95 | 43 | 390 |
| ethnic minorities | 0.5 | 95 | 8 | 74 |
| incapacity to be “reasonable” / have “good sense” | 0.5 | 96 | 100 | 900 |
| innocence / idealism / nostalgia | 0.5 | 96 | 10 | 87 |
| modern technology | 0.5 | 97 | 3 | 29 |
| past | 0.5 | 97 | 3 | 23 |
| rationality / reflection / precision | 0.5 | 98 | 17 | 149 |
| religion – importance | 0.5 | 98 | 2 | 20 |
| separatism | 0.5 | 99 | 17 | 152 |
| sexuality / eroticism | 0.5 | 99 | 8 | 69 |
| sexuality / eroticism - absence / low intensity / | 0.5 | 100 | 100 | 900 |

| | | | | |
|-------------------|-----|-----|----|-----|
| low importance | | | | |
| social inequality | 0.5 | 100 | 30 | 269 |

As can be seen above, the seven most important themes in *Paradox* (measured by their percentage of the total density of the work), which comprise 64% of the total themes in the book (in terms of density) can be deemed universal negative appreciations (that is, irrespective of culture). All these themes except one are very much above the theoretical average, ranging between two times and almost five times the average (the exception being the theme *material want / underdevelopment*, with 108% of the theoretical average). This set is opposed by a set of universally positive themes (*material competence / capacity; satisfaction / peacefulness / fulfilment / happiness; (well-functioning) democracy; modern technology; rationality / reflection / precision*) which account for only 4.5% of the total themes in Arencibia's work, and which are, nonetheless, offset by a set of other less important clearly universally negative themes, comprising 5% of the total (*anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium; underdevelopment / "Third World"; egotism / egocentrism / greed / envy; affective incompetence / incapacity, coldness / insensibility; incapacity to be "reasonable" / have "good sense".*) This shows that even only considering the obviously negative themes (and excluding those for which a slight subjectivity might exist⁵⁶⁶) and *all* the positive themes, it is overwhelmingly clear the American author's negative view of Spain.

How does this translates in terms of density of extension (that is, considering both density and generality)? The following table present the results of such analysis)?

Table B.38 - Distribution of images by themes for *Spain* (density of extension)

| Theme | % in Spain | accumulated % | % in corpus | % of theoretic average |
|--|-------------------|----------------------|--------------------|-------------------------------|
| Total | 100.0 | - | 20.0 | 179.6 |
| material incompetence / incapacity | 15.5 | 15.5 | 42.1 | 378.6 |
| conflict / violence / aggressiveness / rudeness / absence of integration | 11.3 | 26.7 | 54.7 | 492.3 |
| disregard for law, rules, institutions | 10.6 | 37.3 | 36.8 | 331.6 |

⁵⁶⁶ These themes are excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude; gender differentiation; arrogance / pride; modesty / low self-esteem.

| | | | | |
|---|-----|------|-------|-------|
| intolerance / intransigence / prejudice / discrimination | 9.9 | 47.2 | 58.0 | 522.4 |
| rationality / reflection / precision - absence / low level and superstition | 7.6 | 54.8 | 29.6 | 266.0 |
| health - problems / damaging behaviours | 5.4 | 60.2 | 58.2 | 524.2 |
| material want / underdevelopment | 4.0 | 64.2 | 17.3 | 155.5 |
| excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude | 3.5 | 67.7 | 37.3 | 335.3 |
| gender differentiation | 2.5 | 70.3 | 20.3 | 182.9 |
| “tradition” and “traditional” customs / rituals | 2.0 | 72.3 | 10.3 | 92.8 |
| anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium | 2.0 | 74.3 | 23.4 | 210.3 |
| soberness / restraint / “conservatism” | 2.0 | 76.3 | 17.0 | 152.8 |
| liberal mores / liberalization of mores | 1.8 | 78.2 | 34.1 | 306.8 |
| otherness of otherness | 1.8 | 80.0 | 57.1 | 514.1 |
| affective / particular - importance / predominance (over instrumental / universal) | 1.5 | 81.5 | 23.0 | 206.6 |
| development / material prosperity | 1.5 | 83.0 | 19.0 | 170.8 |
| leisure (practice) | 1.5 | 84.5 | 25.3 | 227.7 |
| (social) change – residual | 1.3 | 85.9 | 3.6 | 32.3 |
| material competence / capacity | 1.3 | 87.2 | 12.5 | 112.5 |
| “cultural identity” - absence / low level / decay | 1.0 | 88.2 | 100.0 | 900.0 |
| “underdevelopment” / “Third World” | 1.0 | 89.2 | 24.9 | 224.0 |
| arrogance / pride | 1.0 | 90.3 | 45.6 | 410.8 |
| egotism / egocentrism / greed / envy | 1.0 | 91.3 | 60.4 | 544.0 |
| modesty / low self-esteem | 1.0 | 92.3 | 19.7 | 177.0 |
| satisfaction / peacefulness / fulfilment / happiness | 1.0 | 93.3 | 22.3 | 200.5 |
| (social) change - residual: absence / slow | 0.5 | 93.8 | 6.8 | 60.8 |
| (well-functioning) democracy | 0.5 | 94.3 | 100.0 | 900.0 |
| affective incompetence / incapacity, coldness / insensibility | 0.5 | 94.8 | 53.4 | 480.6 |
| ethnic minorities | 0.5 | 95.3 | 12.9 | 116.5 |
| incapacity to be “reasonable” / have “good sense” | 0.5 | 95.8 | 100.0 | 900.0 |
| innocence / idealism / nostalgia | 0.5 | 96.3 | 9.7 | 87.0 |
| Past | 0.5 | 96.8 | 3.8 | 34.3 |

| | | | | |
|--|-----|-------|-------|-------|
| rationality / reflection / precision | 0.5 | 97.3 | 22.3 | 200.4 |
| religion – importance | 0.5 | 97.8 | 3.3 | 29.3 |
| sexuality / eroticism | 0.5 | 98.3 | 10.2 | 91.5 |
| sexuality / eroticism - absence / low intensity / low importance | 0.5 | 98.8 | 100.0 | 900.0 |
| social inequality | 0.5 | 99.3 | 45.0 | 405.0 |
| modern technology | 0.3 | 99.7 | 3.8 | 33.9 |
| Separatism | 0.3 | 100.0 | 12.8 | 114.9 |

Given that Arencibia is the author with the highest level of generality, its global percentage of intensity of themes in the corpus has raised (to 20%, corresponding now to 180% of theoretical average). The seven most important themes in *Paradox* (measured by their percentage of the total intensity of themes of the work) are the same universal negatives as in the previous Table (where intensity was not considered) and comprise exactly the same 64% of the total themes in the book (now in terms of intensity). All of these themes are considerably above the theoretical average, the minimum value being now 156% of the average, their participation in the total of the corpus having increased (due to the above-mentioned fact that Arencibia has the highest degree of generality). Similarly to what occurs when intensity is not considered, this set of negative themes is opposed by a set of universally positive themes⁵⁶⁷) which account for only 4.6% of the total themes in Arencibia's work (a very similar number vis-a-vis the case where intensity was not considered) and which are (also as in the previous case, although to a lesser extent) offset by a set of other less important clearly universally negative themes, comprising 4.5% of the total⁵⁶⁸. This confirms a clear negative view of Spain even if only the obviously negative themes are considered, those for which a slight subjectivity might exist⁵⁶⁹ are excluded and *all* positive themes (even subjective ones) are considered.

B.10 – Images of tradition and modernity

A first portrayal of Portugal and Spain in terms of the pair traditional society / modern society was presented above based on the top 30% themes. Given the set of themes comprise

⁵⁶⁷ Development / material prosperity; material competence / capacity; satisfaction / peacefulness / fulfilment / happiness; rationality / reflection / precision; modern technology.

⁵⁶⁸ Anguish / sadness / melancholy / unhappiness / dissatisfaction / tension / tedium; “underdevelopment” / “Third World”; egotism / egocentrism / greed / envy; incapacity to be “reasonable” / have “good sense”.

⁵⁶⁹ These themes are excess / intensity / impatience / stubbornness / radicalism / extreme sincerity / exuberance / conspicuous attitude; gender differentiation; arrogance / pride; modesty / low self-esteem.

both common sense and scientific concepts, this section takes into account only the scientific concepts of traditional society / modern, which are now not based on the themes (as above) but directly on the images of the social world, as established in the methodology chapter (in turn based on the discussion of such concepts in the literature review, where the major positions in the field were considered).

For this purpose, an analysis analogous to that performed with the forms and sources of knowledge is carried out, with the difference that here only an internal analysis is performed.⁵⁷⁰ This means that the distribution between the pair in terms of absolute figures is not considered (as it has relevance only when assuming the point of view of the reader), the focus being on density (that is, number of cases per 10,000 words) and density of extension (that is, considering the degree of generality of each image that gives rise to each within the pair).

Table B.39 – Portugal: density of traditional and modern society as share of total density for each work (percentage of the average of the corpus on Portugal)⁵⁷¹

| Work | traditional | modern |
|---------------------------------------|--------------------|---------------|
| Average (%) | 100 | 100 |
| <i>Uma Casa em Portugal</i> | 77 | 34 |
| <i>Trás-os-Montes</i> | 107 | 163 |
| <i>Backwards Out of the Big World</i> | 69 | 99 |
| <i>The last old place</i> | 147 | 105 |
| average for Anglo-Saxons | 98 | 79 |
| average for Spanish | 107 | 163 |

In the case of Portugal one sees a higher dispersion of results for modern society than for traditional society, in both cases dispersion being however quite lower than in many of the other variables analysed thus far.

⁵⁷⁰ Given we are dealing with scientific concepts made of multiple dimensions (as per definitions of traditional society and modern society established in the methodology chapter) it is assumed that the reader would not grasp such concepts.

⁵⁷¹ Regarding this table it should be noted that the data columns cannot be compared in order to reach a comparison between the importance of traditional society and modern society. Column “traditional” measures the density of each author regarding the others in terms of traditional society and mutatis mutandis for column “modern”. For example, the fact that, for *Trás-os-Montes*, modern is higher the traditional does not say anything regarding the balance between them. The same reasoning applies to the next table, for Spain, and below, where applicable.

Table B.40 – Spain: density of traditional and modern society as share of density for each work (percentage of the average of the corpus on Spain)

| work | traditional | modern |
|---|--------------------|---------------|
| Average (%) | 100 | 100 |
| <i>Backwards Out of the Big World</i> * | 19 | 0 |
| <i>The last old place</i> * | 0 | 0 |
| <i>Driving Over Lemons</i> | 241 | 22 |
| <i>It's not about the tapas</i> | 62 | 58 |
| <i>Don Quixote's Delusions</i> | 104 | 211 |
| <i>Spain: Paradox of Values</i> | 76 | 28 |
| <i>Nuevo viaje a la Alcarria</i> | 198 | 381 |
| average for Anglo-Saxons | 84 | 53 |
| average for Spanish | 198 | 381 |

* - *Backwards Out of the Big World* and *The last old place* are included because despite, being focused on Portugal, they present, in all, 7 images of the social world referring to Spain. This applies henceforth where appropriate.

Not considering *Backwards Out of the Big World* and *The last old place* (because they refer to Portugal with the exception of seven images, as seen above), one finds a higher dispersion than for Portugal, with *Driving Over Lemons* reaching 2.4 times the average in the affirmation of traditional society and *Nuevo Viaje* reaching 2 times the average in the affirmation of modern society; *Don Quixote's Delusions* leads modern society.

The next two tables present the results in terms of density of extension.

Table B.41 – Portugal: images of the social world and the pair traditional / modern society – density of extension (percentage of the average of the corpus on Portugal)

| Work | traditional | modern |
|---------------------------------------|--------------------|---------------|
| Average (%) | 100 | 100 |
| <i>Uma Casa em Portugal</i> | 92 | 41 |
| <i>Trás-os-Montes</i> | 96 | 154 |
| <i>Backwards Out of the Big World</i> | 65 | 88 |
| <i>The last old place</i> | 147 | 117 |
| average for Anglo-Saxons | 101 | 82 |

| | | |
|---------------------|----|-----|
| average for Spanish | 96 | 154 |
|---------------------|----|-----|

Once more, one sees a not very high dispersion in results in the case of Portugal, with the inclusion of generality not changing the rank.

In what regards Spain (table below), dispersion is higher even not taking into account the books on Portugal. As with density above, we see a group of two authors clearly above the average and the remaining very much below the average, a patters which continues to apply to traditional society and to modern society, albeit with different authors (the same as in density).

Table B.42 – Spain: images of the social world and the pair traditional / modern society – density of extension (percentage of the average of the corpus on Spain)

| work | traditional | modern |
|---------------------------------------|--------------------|---------------|
| Average (%) | 100 | 100 |
| <i>Backwards Out of the Big World</i> | 21 | 0 |
| <i>The last old place</i> | 0 | 0 |
| <i>Driving Over Lemons</i> | 182 | 23 |
| <i>It's not about the tapas</i> | 79 | 44 |
| <i>Don Quixote's Delusions</i> | 132 | 274 |
| <i>Spain: Paradox of Values</i> | 123 | 33 |
| <i>Nuevo viaje a la Alcarria</i> | 163 | 327 |
| average for Anglo-Saxons | 90 | 62 |
| average for Spanish | 163 | 327 |

The following four tables present, for Portugal and Spain, the composite indexes in terms of density and density of extension. The composite density index for traditional society combines, for each author the following factors with equal weight:

- the percentage of images of traditional society in the total of images classified within the duality by an author (this, in terms of percentage of the average of the group of authors considered)
- the percentage of images of traditional society in the total of images classified as traditional within a group of works (also, in terms of percentage of the average of the group of authors considered) either in absolute terms, in terms of density (considering number of works of

each work) or in terms of density of extension (considering number of works of each work and the degree of generality of each image).

The same applies *mutatis mutandis* for the composite density index for modern society and for the density of extension composite index.

Table B.43 – Portugal: images of the social world and the pair traditional / modern society – composite density (percentage of the average of the corpus on Portugal)

| work | traditional | modern |
|---------------------------------------|--------------------|---------------|
| Average (%) | 100 | 100 |
| <i>Uma Casa em Portugal</i> | 78 | 15 |
| <i>Trás-os-Montes</i> | 85 | 190 |
| <i>Backwards Out of the Big World</i> | 53 | 105 |
| <i>The last old place</i> | 184 | 91 |
| average for Anglo-Saxons | 105 | 70 |
| average for Spanish | 85 | 190 |

In the case of composite density, dispersion has increased in the case of Portugal relative to density, with *The last old place* not far from doubling the average for traditional society and *Backwards Out of the Big World* reaching half the average; despite this, no change in order takes place. In what regards modern society, one also sees an increase in dispersion relative to density, with *Trás-os-Montes* almost doubling the average, and here there is an exchange in order between *Backwards Out of the Big World* and *The last old place*.

Table B.44 – Portugal: images of the social world and the pair traditional / modern society – composite density of extension (percentage of the average of the corpus on Spain)

| Work | traditional | modern |
|---------------------------------------|--------------------|---------------|
| Average (%) | 100 | 100 |
| <i>Uma Casa em Portugal</i> | 93 | 18 |
| <i>Trás-os-Montes</i> | 76 | 183 |
| <i>Backwards Out of the Big World</i> | 50 | 95 |
| <i>The last old place</i> | 182 | 103 |
| average for Anglo-Saxons | 108 | 72 |
| average for Spanish | 76 | 183 |

Composite extension results for Portugal are partially similar with those of extension, with the highest and lowest authors keeping their positions and interchange in rank taking place in the

middle positions in what regards traditional society and no change occurring with modern society.

Table B.45 – Spain: images of the social world and the pair traditional / modern society – composite density (percentage of the average of the corpus on Portugal)

| work | traditional | modern |
|----------------------------------|--------------------|---------------|
| Average (%) | 100 | 100 |
| <i>Driving Over Lemons</i> | 302 | 2 |
| <i>It's not about the tapas</i> | 30 | 22 |
| <i>Don Quixote's Delusions</i> | 32 | 108 |
| <i>Spain: Paradox of Values</i> | 18 | 2 |
| <i>Nuevo viaje a la Alcarria</i> | 119 | 366 |

In Spain, the extreme positions are once more kept when compared with what happened in extension terms both for traditional society and modern society. There is a great(er) dispersion, with migrant Chris Stewart leading with a figure 3 times the average, Camilo Jose Cela being second almost 20% above the average and all other authors much behind. A similar pattern happens with modern society, although with different authors: tourist-traveller Cela leads with a figure 3.6 times the average, Mirand France is above the average but near to it and all other authors are much behind.

These patterns are maintained in terms of composite density of extension (table below).

Table B.46 – Spain: images of the social world and the pair traditional / modern society – composite density of extension (percentage of the average of the corpus on Spain)

| work | traditional | modern |
|----------------------------------|--------------------|---------------|
| Average (%) | 100 | 100 |
| <i>Driving Over Lemons</i> | 264 | 2 |
| <i>It's not about the tapas</i> | 43 | 17 |
| <i>Don Quixote's Delusions</i> | 47 | 148 |
| <i>Spain: Paradox of Values</i> | 33 | 2 |
| <i>Nuevo viaje a la Alcarria</i> | 113 | 330 |

All in all, and confirming the results of the analysis of extension for the top 30% themes, both Portugal and Spain are pictured as much more traditional than modern and Portugal is the country in which this is more pronounced. The table below summarizes these results in terms of

Anglo-Saxon authors versus Spanish authors, with “0” denoting images of the social world not ascribed to modernity (“m”) nor premodernity/traditional society (“t”).

The table below summarizes results in terms of the subgroups of the corpus Anglo-Saxons and Spanish.

Table B.summ – Modernity/premodernity per groups of authors

| | Averages | 0 | m | t | total |
|--------------------------------|------------------|------|------|------|-------|
| Within work share | Anglo-Saxons (A) | 61.1 | 9.6 | 29.3 | 100 |
| | Spanish (S) | 48.2 | 25.1 | 26.7 | 100 |
| | A / S | 1.3 | 0.4 | 1.1 | |
| Density | Anglo-Saxons (A) | 8.5 | 1.3 | 3.7 | |
| | Spanish (S) | 9 | 4.7 | 5 | |
| | A / S | 0.9 | 0.3 | 0.7 | |
| Density of extension | Anglo-Saxons (A) | 20.2 | 3.1 | 7 | |
| | Spanish (S) | 15.6 | 8.7 | 7.6 | |
| | A / S | 1.3 | 0.4 | 0.9 | |
| Composite density | Anglo-Saxons (A) | 5.2 | 0.1 | 1.1 | |
| | Spanish (S) | 4.3 | 1.2 | 1.3 | |
| | A / S | 1.2 | 0.1 | 0.8 | |
| Composite density of extension | Anglo-Saxons (A) | 12.3 | 0.3 | 2.1 | |
| | Spanish (S) | 7.5 | 2.2 | 2 | |
| | A / S | 1.6 | 0.1 | 1.1 | |

A focused analysis on tradition and modernity

Following the same methodology as with the focused analysis of the themes (above in this Annex) and for the same reasons then presented, a focused analysis of the pair traditional / modern is performed below, once more by excluding the works of Hewitt, Llamazares, Stewart and Cela on the grounds that they deal with specific regions, not whole countries. Arencibia is not excluded because, although his observation is overwhelmingly Madrid-based, his degree of generality is very high and indirect information comprises a very significant part of his sources (26% of the total number of sources), which means he is not focused solely in such city. Again, an internal perspective is adopted (which means using the indicator extension), for the same reasons presented in the methodology explained in the themes section above. No composite analysis is performed here because, as just seen above, there are no significant differences

between density and composite density. Next tables present the values for the focused analysis and a comparison with the extended analysis.

Table B.47 - Portugal – Extension for traditional society and modern society - % of total – extended analysis versus focused analysis

| | traditional | modern | non classified |
|-----------------------|--------------------|---------------|-----------------------|
| extended analysis (a) | 27.2 | 10.4 | 62.4 |
| focused analysis (b) | 27.4 | 10.5 | 62.1 |
| difference (b-a) | 0.2 | 0.1 | -0.3 |

As can be seen above, there are no significant differences between the extended and the focused analysis.

Table B.48 - Spain – Extension for traditional society and modern society - % of total – extended analysis versus focused analysis⁵⁷²

| | traditional | modern | non classified |
|-----------------------|--------------------|---------------|-----------------------|
| extended analysis (a) | 19.6 | 14.8 | 65.6 |
| focused analysis (b) | 14.4 | 10.5 | 75.0 |
| difference (b-a) | -5.2 | -4.2 | 9.4 |

In the case of Spain, both the densities of extension of traditional and modern see a reduction of identical magnitude (at the expense of the non classified cases, which increases almost 10 percentage points), so no fundamental change occurs.

Donkeys and black clothes – two special subthemes of premodernity

Descriptions or references to donkeys and mules (not horses, it should be noted) number 26 in a total of 1,294 images of the social world. This makes around 2.01% of total and therefore this subtheme would rank 17 if included in the ranking of 78 different themes identified in the corpus. In the country disaggregation, Portugal is confirmed as more traditional than Spain: there

⁵⁷² For the sake of methodological consistency, the works *Backwards Out of the Big World* and *The last old place* are also considered for Spain in the cases where they assume within the axis *on Spain*. However, given the very small number of cases of this nature, its exclusion would hardly change the results.

are 14 cases for Portugal in a total of 526 (2.66% of the total for Portugal) and 12 cases for Spain in a total of 765 (1.57%). Were this subtheme a theme, it would rank 14 in 62 themes in the case of Portugal and 22 in 71 themes in the case of Spain.⁵⁷³

The subtheme black clothes number 12 images in the same total of 1,294 images of the social world (around 0.93% of total), and would rank 29 in 78 themes, if included in the ranking of themes. Of those 12 images, 8 refer to Portugal in a total of 526 (1.52%) and 4 refer to Spain in a total of 765 (0.52%), with the corresponding rankings being 20 in 62 and 41 in 71 themes.

B.11 – The difference or similarity of otherness

The table below presents the absolute number of cases of affirmations of difference or similarity regarding the pair sameness / otherness.

Table B.49 – Difference and similarity of otherness (number of cases)

| work | similarity (a) | difference (b) | (a) - (b) |
|---------------------------------------|-----------------------|-----------------------|------------------|
| <i>Uma Casa em Portugal</i> | 2 | 3 | -1 |
| <i>Trás-os-Montes</i> | 1 | 0 | 1 |
| <i>Backwards Out of the Big World</i> | 2 | 0 | 2 |
| <i>The last old place</i> | 3 | 0 | 3 |
| <i>Driving Over Lemons</i> | 1 | 4 | -3 |
| <i>It's not about the tapas</i> | 2 | 3 | -1 |
| <i>Don Quixote's Delusions</i> | 2 | 2 | 0 |
| <i>Spain: Paradox of Values</i> | 1 | 12 | -11 |
| <i>Nuevo viaje a la Alcarria</i> | 0 | 0 | 0 |
| Total | 14 | 24 | -10 |

The first salient result is the extremely reduced number of cases: only 38 cases fall within the unity / difference pair, within a universe of 1,294 images of the social world (2.9%). Differently to what might be the case with other indicators, this is not problematic for the relevance of the results. Given the fundamental and philosophical nature of the question it is expected that the positioning of an author within the pair is either not present or very clear when

⁵⁷³ If that new ranking with this subtheme as theme was calculated, one should account for the fact that this subtheme belongs to the theme *non-mechanized / subsistence agriculture* and therefore, to avoid double counting, the number of cases of the subtheme should be subtracted from the original number of cases of the theme *non-mechanized / subsistence agriculture*. Even if that was done, the results presented here would not be changed. Similar reason applies to the subtheme *black clothes*, treated below.

present and that in this latter case one can infer the positioning from a small number of empirical manifestations.

Still, as can be seen in the same table, in three works (*Uma Casa em Portugal, It's not about the tapas* and *Don Quixote's Delusions*) the distribution between the two positions is quite balanced. For the remaining authors the distribution is more asymmetric, but the absolute number of cases is very low, with absolute differences between difference or similarity being no greater than 3. *Spain: Paradox of Values* clearly stands out from the other works in terms of absolute difference (-11), but even Arencibia, the author, positions himself in *both* extremes of the axis. Overall, thus, no author locates her/himself exclusively in one of the extremes of the pair (with the exception of Camilo José Cela, who does not position himself in this regard). This raises the question of whether the authors of the corpus are in contradiction, an issue which makes it necessary to consider one by one the images of the social world relevant in terms of classification within the axis (their small number makes the task feasible).

Uma Casa em Portugal contains three images of difference: in Portugal one experienced “absence of rational expectations” (:12); the Portuguese had an “impenetrable logic” (:199); and local workers lived in “another century” (:14). The first two are clear-cut cases of difference because they refer explicitly to lack of rationality, while the latter can also be seen in such a light as it states a linear vision of History in which the Portuguese are in a fundamentally different stage. There are also two instances of similarity: when the author explains in the same way the lack or low abuse of alcohol and medicinal drugs (both on page 172) by claiming the phenomena are due to the free access to these products; consequently, he goes on, they are not demanded as “forbidden fruits”, an account he implicitly considers not solely applicable to Portugal, therefore explaining in the same way otherness and sameness.

No contradiction seems to present here in Hewitt, then, because the explanations affirm similarity through a mechanism (the desire for a “forbidden fruits”) which does not involve the absence of rationality (the affirmation of which would amount to contradiction relative to its affirmation as noted above); further, desire can be seen as a premodern or even eternal attribute of humans, both present “in another century” and in the present one.

Trás-os-Montes contains a single case within the axis – a case of unity. Llamazares, the author, states on page 42 that “there is nothing as our own land” to justify the contentment of Portuguese emigrants temporarily returned to the homeland. The principle he resorts to can be

seen as regarding not only the emigrants but at least himself (given the use of the word “own”) and possibly the cultural or national group he belongs to or even Humanity, but this sole consideration regarding a specific dimension does not make him a humanist.

Backwards Out of the Big World presents two positions within the pair, both referring to similarity. On page 36 the author quotes another writer (who in turn is referring to other writers) about the Portuguese national character, which includes “good sense” – although this quality and that of rationality are not the same, one seems to imply the other and therefore this is deemed a case of similarity. On page 93, when referring to the inhabitants of a village near Tagus River who trace their origins to a group of fishermen that used to live by the sea, Paul Hyland writes: “Here was a people in retreat, rapidly joining the rest of us”. Although difference is implied, it is not of the same kind of that induced from Hewitt's otherness, living “in another century”, as in Hyland otherness and sameness are in the process of getting identical; further, Hyland speaks of a very specific social group, not the whole of the Portuguese otherness, as in Hewitt's reference to Portuguese workers.

When describing Lisbon, Datus Proper, the author of *The last old place* holds that “Capitals in any country are made up of politicians, celebrities, shops, and tourists who fancy politicians, celebrities, and shops” (:26). He also sees similarity when suggesting that some peasants “perhaps (...) were just following the universal male policy of doing nothing that a woman can be persuaded to do instead” (:87). On page 174, he indirectly attributes intelligence to the Portuguese when describing the “serious person”, who is embodied by his informant Adriano and at the same time constitutes an epitome of the Portuguese (in the same page Proper says that “Portuguese have no monopoly on seriousness, but they perfected the art”).

In *Driving Over Lemons*, Chris Stewart portrays a dispute between a local shepherd and an English woman living in the Alpujarras (who complains about the destruction his goats produce in the countryside) as a “battle between the ecologists and the pastoralists” (:192). He thus locates the conflict outside the dichotomy sameness-otherness (which might have been the obvious choice), the reason why such attitude is deemed an instance of affirmation of similarity, the only in the book. Given the narrow context of his contact with otherness, the cases of difference (four), regard either specific individuals, a village in the Alpujarras or the region of the Alpujarras itself, not the whole of Spain.

It is thus that in page 51, a local inhabitant says, “You can't afford to be too fussy in these matters” when referring to the use of a digging machine with rubber wheels, after having strongly criticized such type of machine. Even if Stewart does not directly sees difference here, he seems to be pointing quite clearly to lack of consistency. In page 93 this positioning is more overt, when he writes in the context of a difficulty arising within the local collective pig killing that “Everybody knows this [a problem in the killing process] is going to happen because it always does happen. Yet everybody always knows better than everybody else what should have been done to prevent it.” Referring to himself and his wife (:65), the author notes “our ridiculous and embarrassing worldly goods” as seen from what he voices as the point of view of local inhabitants who watch the couple unloading their vehicle, affirming difference. Later (:102), he describes an individual who “was of the persuasion - and he's not alone in this - that anyone who is not from the Alpujarras is incomprehensible”.

Referring to the Catalan people, Polly Evans, the author of *It's not about the tapas*, writes in page 126 that individuals who do not show the necessary dose of common sense are criticized; on page 105, Evans explains a Catalan term meaning common sense. On the side of difference, after receiving contradictory information from different people about how to go to some place in the province of Andalucía she writes: “and they *lived here*, for heaven's sake” (:218), a hint at lack of rationality, which does not contradicts the first one because it refers to a different object. In the same vein of highlighting lack of rationality is the he phrase “They'r used to craziness in Spain” (:13), while a fundamental difference (at least with parts of otherness) is stated when she writes: “I didn't have one of those tiresome Catholic upbringings that requires you to feel guilt every time anything nice happens - God knows how it is that the Spanish manage to lead such cheerful lives” (241). The possible contradiction between seeing unity in Catalonia (pages 126 and 105) and lack of rationality (and therefore, difference), in Andalusia (:218) can be overcome by seeing both provinces as separate entities with different qualities (although, interestingly, a significant percentage of the population of Catalonia is of Andalusian origin). The “tiresome Catholic upbringings” and their consequence (214) seem to belong to a different category than rationality or its absence, while craziness can be reconciled with Catalonia's common sense seeing Catalonia as specific subset of Spain.

In *Don Quixote's Delusions* there is a perfect balance of frequencies of affirmation of difference and similarity, but the author is operating in different dimensions, maintaining

consistency. Seeing a man carrying a billboard talking about the end of the world, France claims that “some, things are the same wherever you go” (:23), while in page 40 she holds that “like any country discovering democracy after a long dictatorship, Spain seemed to make swipes at liberty, indiscriminately lifting restrictions that smacked of the old regime.” Opposing these claims respectively of same fact and same explanatory process, which sustain unity, there are two claims of difference: “few things are stranger than a Spanish fiesta”, (:225) and the voice a philosophy student saying “people in Spain don't think enough, they don't ask themselves about the reason for things, they don't analyse” (:65)⁵⁷⁴.

In *Spain: Paradox of Values* a clear difference exists between the number of cases holding similarity (1) and the number of cases holding difference (12). The sole affirmation of unity in *Spain: Paradox of Values* is performed on page 8, when Arencibia proclaims, “Spaniards are not stupid”. In considering this possible affirmation of rationality, one should note that it could only be constructed as an indirect one, and also take into account the following excerpt (:92):

In general, Spaniards do not have the behavioural traits expected of educated people: reasoning, logic, plus the ability to think objectively and independently. These qualities were never given an opportunity to develop. A mere twenty eight years of democracy and freedom do not make a society suddenly intelligent, educated or cultured.

Although mostly seeing the Spanish as irrational (evidence for which exists elsewhere⁵⁷⁵), the American author considers them prone to transformation (for which they do not seem to need centuries, as in Hewitt) through forces applying to all societies, which means both difference or similarity (here, with a hint of Humanism, much more clear than in Hewitt) are present in the excerpt without the existence of an outright contradiction. Despite this, and further complexifying his position within the pair, Arencibia also finds characteristics apparently not given to transformation and which he does not explain, presenting them as somewhat fundamental, perennial traits of difference. The statement “‘healthy’ is not an adjective I would

⁵⁷⁴ This later images of the social world should of course be taken with care because it is a mediation, not a direct intervention of the author. However, the fact that France gives voice to the student for a considerable extent (about two pages), not commenting what she holds and the fact that a contrary position is not voiced might show some sort of agreement, the reason this is considered as a position of the author, or at least of the book.

⁵⁷⁵ In Spain there is “lack [of] abstract thinking” (page 281); “urban legends and myths occupy the mind of even the most educated Spaniards” (page 157); “the majority in Spain [...] hold on to fallacious beliefs, never wanting to change their comfortable point of view, in spite of contradictory evidence (page 65).

use to describe their mental state” (:255) is not accompanied by an explanation and the author is thus claiming that a whole people lacks mental health, or at least that in the country a “disproportionate amount of mental illness” existis (:257). In the same vein, he notes in page 281 that

The perception that Spaniards have on life and on the world is based on ignorance of other possibilities. Ignorance is one thing - we all lack of knowledge in something. But waiting to stay ignorant shows a want of good sense.

This lack of good sense (which ultimately can be considered equated with irrationality, as seen above in Hyland and Evans) seems to be at play in the affirmation (:246) that a significant percentage of young people routinely have sex without protection “not because they are unaware of the dangers. Most claim to know the risks associated with unprotected sex.”. Interestingly, Arencibia also performs the only clear case of cultural relativism in the corpus, when he claims, “Spanish behaviour seems rude to non-Spaniards who are not culturally conditioned to accept being barked at” (:139), adding both sympathetically and critically that “this doesn't mean Spaniards don't like you – it's just part of [...] the national character of Spain in general”.

Arencibia goes deeper in the affirmation of difference with a number of very general statements on Spain, significantly located at the beginning and at the end of the text. In page 1 one can read that “only a handful of enlightened Spaniards, particularly those who have lived abroad, can spot the irregularities” of daily life (:1) and even that “Spain is more than different, it is surreal” (:2). In a balance in the final pages of the book, Arencibia claims that “the violence, the behaviour of people, the excessive domestic abuse – none of this can be considered normal, anywhere” (:272) and that he has “described [...] a Spain of surreal contrasts, contradictions and anomalies.” (:281). On the whole, then, the American author overwhelmingly affirms difference in terms of frequency (including a few cases of humanism), and his overall reasoning regarding the pair is made contradictory by the single case of affirmation of unity (when he holds Spanish rationality against all the other cases where he affirms the contrary).

The following table summarizes the results just seen:

Table B.50 – Difference and similarity; humanism and cultural relativism

| work | view(s) of otherness | ideological position(s) |
|----------------------------------|--|---|
| <i>Uma Casa em Portugal</i> | difference, similarity | trace(s) of cultural relativism |
| <i>Trás-os-Montes</i> | similarity | not evident |
| <i>Backwards Out of the...</i> | similarity | trace(s) of humanism |
| <i>The last old place</i> | similarity | not evident |
| <i>Driving Over Lemons</i> | difference, similarity | trace(s) of humanism |
| <i>It's not about the tapas</i> | difference, similarity | trace(s) of humanism |
| <i>Don Quixote's Delusions</i> | difference, similarity | not evident |
| <i>Spain: Paradox...</i> | difference (largely predominant), similarity | trace(s) of humanism <i>and</i> trace(s) of cultural relativism |
| <i>Nuevo viaje a la Alcarria</i> | none | not evident |

B.12 – Correlations between some variables

Many correlation coefficients could be calculated between the variables used throughout this study. This is done, however, only for a small fraction of such universe, excluding the cases where: there is high redundancy (e.g. density of images versus density of extension of knowledge of the social, which is a mathematical function of the former and the density of images); the absolute number of case is extremely low (e.g., the number of cases of affirmation of unity or difference is only 38, in a universe of more than 1,000 images of the social world, as can be seen in Table B.49, page 337 above); no correlation is expected on theoretical grounds and/or no sense seems possible to be made out of such relations (for example, density of images versus degree of traditional society). The correlation coefficients deemed relevant according to these criteria are presented in the tables below and are always calculated considering densities, the only exception being the degree of generality, a variable for which density does not apply. For each pair of variables $[a,b]$, the correlation coefficient is calculated based on the values variable a assumes for each author on the corpus and the same for variable b ⁵⁷⁶.

⁵⁷⁶ It should be noted that in the calculation of correlation coefficients it is irrelevant whether absolute values or absolute values in terms of percentage of the average are used given the latter is a linear transformation of the former, thus not changing the results.

Table B.51 – Correlations coefficients between images, forms and sources (in terms of densities).

| | forms | sources |
|--------|-------|---------|
| images | 0.97 | 0.87 |
| forms | | 0.96 |

None of the above variables is a mathematical function of any other in the group. However, confirming the theoretical expectation that they are not independent, due to the way they are defined and counted (as detailed in the methodology chapter), large positive correlations are observed in all cases.⁵⁷⁷

What about the correlations between the epistemological investment each author makes in each form of knowledge and her/his epistemological investment in each source of knowledge? The tables below present the correlations between forms and sources, disaggregated by types in composite terms⁵⁷⁸.

Table B.52 – Correlations coefficients between types of forms of knowledge and types of sources of knowledge

| | observation | reflection | indirect information | informants |
|-------------|-------------|------------|----------------------|------------|
| description | 0.96 | -0.20 | -0.34 | -0.13 |
| assessment | -0.41 | 0.92 | 0.85 | -0.15 |
| mediation | -0.29 | -0.19 | 0.09 | 0.93 |
| explanation | -0.63 | 0.83 | 0.90 | -0.07 |

⁵⁷⁷ The terminology *large, moderate and minor* is taken from Cohen (1988), quoted in Hopkins (2000, www.sportsci.org/resource/stats/): according to him, a correlation of 0.5 is large, 0.3 is moderate, and 0.1 is small. Hopkins claims that “the usual interpretation of this statement is that anything greater than 0.5 is large, 0.5-0.3 is moderate, 0.3-0.1 is small, and anything smaller than 0.1 is insubstantial, trivial, or otherwise not worth worrying about.” Cohen proposes himself the following refinement of Cohen's classification: 0.0-0: trivial, very small, insubstantial, tiny, practically zero; 0.1-0.3: small, low, minor; 0.3-0.5: moderate, medium; 0.5-0.7: large, high, major; 0.7-0.9: very large, very high, huge; 0.9-1: nearly, practically, or almost perfect, distinct, infinite

⁵⁷⁸ In each of these two cases (types of forms / sources) there are three possible choices for indicators of epistemological investment: a) percentage of each form / source of knowledge in the work; b) density of each form / source of knowledge; c) composite index for each form / source of knowledge. Given there are no theoretical grounds for choosing a) (which shows how the images of the social world of an author are distributed in terms of forms / sources within each work) to b) (which, when considered in terms of correlation, indicates the density of each image form / source for each author within the total of the corpus), c), which is an average of a) and b) with equal weights, is used. The same reasoning applies henceforth for other cases of correlations between types of forms and types of sources.

| | | | | |
|---------------|-------|-------|------|------|
| understanding | -0.41 | -0.24 | 0.25 | 0.79 |
|---------------|-------|-------|------|------|

Several very high positive correlations stand out (reflecting the fact the form of knowledge at stake was credited as source of an overwhelming majority of images of the social world assuming the form of knowledge at stake): between description and observation; assessment and reflection; assessment and indirect information; mediation and informants; explanation and reflection and understanding and informants. A high negative correlation occurs between explanation and observation and moderate negative correlations occur between description and indirect information; assessment and observation and understanding and observation, with the remaining correlations being low or very low, showing that there is no strict correspondence between forms and sources and that, consequently, they are not redundant vis-à-vis one another.

Degree of generality versus other variables

The next two tables consider the correlation between generality and the epistemological effort put in each of the forms of knowledge and in each of the sources of knowledge.

Table B.53 – Correlations coefficients between degree of generality and composite indexes for forms of knowledge

| variable | correlation coefficient |
|-----------------|--------------------------------|
| description | -0.45 |
| assessment | 0.68 |
| mediation | 0.11 |
| explanation | 0.90 |
| understanding | 0.38 |

With a negative moderate correlation, description stands in contrast, with the exception of mediation (small – almost very small – correlation), with all other types of knowledge, which vary from moderate (understanding) to large / almost very high (assessment) to very high (explanation).

Table B.54 – Correlations coefficients between degree of generality and composite indexes for sources of knowledge

| variable | correlation coefficient |
|----------------------|--------------------------------|
| observation | -0.61 |
| reflection | 0.78 |
| indirect information | 0.86 |
| informants | 0.15 |

No surprisingly given the high correlation between description and observation, we see also a negative correlation (now high) between the latter and the degree of generality. Reflection and indirect information are attached to high levels of generality and informants show a very small correlation.

Broadly, these results in terms of forms and sources versus generality confirm the expectation that description / observation is usually attached to the particular (opposing higher levels of generality), with the remaining forms / sources tendentially associated with higher generality, the exception to this latter assertion being mediation / informants with a small positive correlation, which suggests that in their epistemological contributions to the works, informants are not particularly attached neither to a low nor to a high degree of generality (that is, they do not tend to more claims about their concrete situation or about the societal whole (culture / country) in which they are immersed. The following table presents the correlation coefficients between generality and epistemological empathy.⁵⁷⁹

Table B.55 – Correlations coefficients between generality and epistemological empathy

| | level of difference | correlation coefficient |
|----------------------|----------------------------|--------------------------------|
| assessment | 0 | 0.52 |
| | 50 | 0.45 |
| | 100 | 0.41 |
| no assessment | 0 | 0.59 |

⁵⁷⁹ It should be noted that these correlations are not redundant vis-à-vis the correlations between generality and the epistemological investments in forms of knowledge: epistemological empathy is calculated based on *density* of forms of knowledge while the above epistemological investments are based on composite values for forms.

| | | |
|--|-----|------|
| | 50 | 0.5 |
| | 100 | 0.45 |

In all cases, the exclusion of assessment implies a slight increase in correlations. The majority of these are moderate (albeit close to the threshold for being considered large), and when difference is zero they increase to large.

Negativeness versus other variables

Correlations can also be searched in relationships between structural variables (such as images, forms, sources and variables which are functions of these such as epistemological empathy) and content variables (which regard actual portraits of Spain and Portugal, such as negativeness or the semi-structural variable traditional / modern societies). The following tables present correlations between variables belonging to these categories.

Table B.56 – Correlations coefficients between epistemological empathy and negativeness

| | level of difference | correlation coefficient |
|----------------------|----------------------------|--------------------------------|
| assessment | 0 | 0.24 |
| | 50 | 0.18 |
| | 100 | 0.15 |
| no assessment | 0 | 0.36 |
| | 50 | 0.27 |
| | 100 | 0.22 |

Considering assessment, the correlations are low, while the exclusion of assessment implies an increase which turns one correlation moderate (the case of a difference level of zero, with a 0.36 correlation coefficient) and another one close to the minimum threshold for being moderate (the case of a difference level of 50%, with a 0.27 correlation coefficient). We thus find a slight positive association between epistemological empathy and negativeness, which suggests that, in part, the more an author invests in seeing more than what meets the eye going for other forms of knowledge other than description, the less positive is her/his perspective on a country, matching the result below (Table B.57) that description shows a low / almost moderate negative correlation

with negativeness. The tendency that a deeper knowledge of the social world tends to generate negative portraits can also be seen at work in the next table.

Table B.57 – Correlations coefficients between negativeness and several structural variables

| variable | correlation coefficient |
|---|--------------------------------|
| images | 0.27 |
| generality | 0.77 |
| forms | 0.45 |
| sources | 0.61 |
| density of extension of knowledge of the social | 0.64 |

Here we see that negativeness is highly correlated with the density of extension of knowledge of the social, in part stemming from a low / almost moderate correlation (0.27) with the density of images of the social world (one of the arguments in the function density of extension of knowledge of the social) but mostly due a very high correlation with generality (the other argument). This latter result shows that the higher the level of generality of images of the social world, the higher the negativeness, and is in great part due to Franck Arencibia's high average level of generally (1st in the corpus, 40% above the average) and extremely high level of negativeness (3.3 times the average) and to a lesser degree to Miranda France's work, which ranks second in the corpus as regards both variables, and Chris Stewart, whose is last in rank in both variables.

Table B.58 – Correlations coefficients between negativeness and composite indexes for forms of knowledge

| variable | correlation coefficient |
|-----------------|--------------------------------|
| description | -0.29 |
| assessment | 0.94 |
| mediation | -0.01 |
| explanation | 0.81 |
| understanding | 0.02 |

Mediation and understanding show up as not correlated with negativeness. Description shows a low / almost moderate correlation and conversely all other forms show very high

correlations, that is, negativeness is strongly associated with two forms of knowledge which require a more active epistemological behaviour (in contrast to more passive epistemological behaviour involved in description, although the choice of what to describe and what to exclude from description may be also an active epistemological effort, the same happening with other forms of knowledge). These results match the above result of a (slight) positive association between negativeness and epistemological empathy.

In what regards sources (table below), results are analogous to those observed for the forms of knowledge, as it would be partially considering the strong correlation existing between certain types of forms and certain types of sources due to the way these are defined (and which is detailed in the methodology chapter).

Table B.59 – Correlations coefficients between negativeness and composite indexes for sources of knowledge

| variable | correlation coefficient |
|----------------------|--------------------------------|
| observation | -0.43 |
| reflection | 0.86 |
| indirect information | 0.93 |
| informants | 0.02 |

Observation shows a moderate negative correlation with negativeness (not far from 50%, the minimum threshold for being high) as is the case with description above, to which is strongly (although not biunivocally); informants show no correlation, as is the case of mediation above, to which is in great part (although not biunivocally) associated. On the other hand, reflection presents a very high correlation with negativeness, as is the case with assessment, to which is strongly associated; while indirect information also presents a very high correlation with negativeness, in this showing the same pattern as two forms of knowledge which also require active epistemological behaviour on the part of the writer (assessment and explanation).

The correlation coefficients between description and positiveness and between observation and positiveness⁵⁸⁰ are positive, contrasting with the negative coefficients between positiveness and assessment and positiveness and explanation (correlations with the other forms of knowledge being insignificant). In combination with the negative correlation between positiveness and

⁵⁸⁰ What was actually observed were negative coefficients between description and negativeness, on one side, and observation and negativeness, on the other, but this is more clearly expressed in positive terms.

reflection and positiveness and indirect information, this could suggest that what the eye sees tends to be more positive than other forms of knowledge. Other explanation, not incompatible with the former, would be that, even if “objective” in the choice of the descriptions to be included their works (e.g. including all images found in the interaction with otherness), authors tend to assume a negative bias when resorting to other sources and when expressing themselves through other forms than those associated with the eye.

Negativeness excluding Frank Arencibia's Spain versus other variables

Do these results regarding negativeness hold with the exclusion of a work which is by far the most negative in the corpus (3.3 of the average as against 1.4 of the second most negative author, as mentioned above)? This is also a work that shows negative prejudice towards otherness through certain observable mechanisms in its writing (as detailed in the corresponding section of the next chapter). The following tables answer this question.

Table B.60 – Correlations coefficients between epistemological empathy and negativeness excluding Frank Arencibia's *Spain*

| | level of difference | correlation coefficient |
|----------------------|----------------------------|--------------------------------|
| assessment | 0 | 0.71 |
| | 50 | 0.74 |
| | 100 | 0.76 |
| no assessment | 0 | 0.74 |
| | 50 | 0.76 |
| | 100 | 0.77 |

Now all correlations (which varied previously from low to moderate) are very high. This allows to affirm now clearly that the more an author (at least in this corpus) invests in seeing more than what meets the eye, going for forms / sources of knowledge “deeper” than description / observation, the more negative their images become. The predisposition to know more (epistemological empathy) finds less sympathetic results.

On the other hand (table below), there is a reduction in the correlation between negativeness and generality, from very high to moderate (but very close to the minimum threshold for high), which nonetheless still suggests to a fair degree that negativeness tends to be conveyed by images of the social world with high level of generality.

Table B.61 – Correlations coefficients between negativeness and several structural variables excluding Frank Arencibia's *Spain*

| variable | correlation coefficient |
|---|--------------------------------|
| images | 0.39 |
| generality | 0.49 |
| forms | 0.45 |
| sources | 0.37 |
| density of extension of knowledge of the social | 0.59 |

We also see (Table above) changes in the correlations between negativeness, on one side and images (goes from low to moderate), sources (significant reduction from high to moderate) and density of extension of knowledge of the social (small reduction, maintaining the status of high, meaning that the assertion that a deeper knowledge of the social world tends to generate negative portraits holds).

Table B.62 – Correlations coefficients between negativeness and composite indexes for forms of knowledge excluding Frank Arencibia's *Spain*

| Variable | correlation coefficient |
|-----------------|--------------------------------|
| description | -0.24 |
| assessment | 0.35 |
| mediation | 0.70 |
| explanation | 0.08 |
| understanding | 0.70 |

Description does not see much change, while assessment shows an important reduction in its correlation with negativeness, going from extremely high (0.94 when Arencibia is included) to a moderate correlation, which means Arencibia's assessments tend to be quite more negative than those of the rest of the corpus. There are greater changes in what regards the remaining variables:

mediation suffers a very high increase, from null to very high, with the same happening to understanding and the opposite occurring with explanation.

Table B.63 – Correlations coefficients between negativeness and composite indexes for sources of knowledge excluding Frank Arencibia's Spain

| variable | correlation coefficient |
|----------------------|--------------------------------|
| observation | -0.30 |
| reflection | -0.03 |
| indirect information | 0.66 |
| informants | 0.79 |

Analogous changes take place with reflection (from very high to nil) and informants (from nil to very high), with indirect information showing a reduction from extremely high to high. Observation sees significant reduction, but maintains the status of a moderate correlation with negativeness.

When excluding Arencibia, one still finds the negative correlations between description and negativeness versus negativeness, against the other positive significant correlation coefficients in terms of forms and sources. This holds the suggestion that what the eye experiences is tendentially more positive than other forms of knowledge and/or authors tend to assume a negative bias when resorting to (some) other sources and expressing themselves through (some) other forms. Frank Arencibia's Spain, then, does not alter significantly the correlations of negativeness when taking these broad view.

The pair traditional society / modern society versus other variables

A similar analysis to the one which has been performed above regarding generality and negativeness is performed below for the pair traditional society / modern society.⁵⁸¹

⁵⁸¹ In this regard, one should note beforehand that there is no complementarity between the two types in the sense that the higher the one, the lower the other (because of the third possibility of non-classification), which is mathematically conveyed by the fact that the correlation coefficient between them is 0.10 (that is, positive, albeit very low).

Table B.64 – Correlations coefficients between epistemological empathy and density of extension of traditional / modern society

| | level of difference | correlation coefficients | |
|----------------------|---------------------|--------------------------|----------------|
| | | traditional society | modern society |
| assessment | 0 | -0.21 | 0.68 |
| | 50 | -0.20 | 0.71 |
| | 100 | -0.19 | 0.72 |
| no assessment | 0 | -0.24 | 0.68 |
| | 50 | -0.22 | 0.71 |
| | 100 | -0.21 | 0.72 |

Here the exclusion of assessment does not alter significantly the results (in the case of modern society very small changes take place, not visible in the Table due to rounding). Traditional society shows low negative correlations with epistemological empathy, while modern society shows correlations almost very high (very close to the minimum threshold for high) and clearly high correlations. It should be noted that in these results the effect of different book extensions has been excluded (due to the presence of density in both epistemological empathy and the intensities of modern and traditional societies).

Table B.65 – Correlations coefficients between density of extension of traditional / modern society and several structural variables (densities where applicable)

| Variable | correlation coefficients | |
|---|--------------------------|----------------|
| | traditional society | modern society |
| images | 0.34 | 0.80 |
| generality | -0.36 | 0.02 |
| forms | 0.25 | 0.66 |
| sources | 0.22 | 0.49 |
| density of extension of knowledge of the social | 0.10 | 0.60 |

In the Table above one sees that the higher the density of images and the density of extension of knowledge of the social, the more modern society shows up, which only partially happens in the case of traditional society (a moderate correlation of 0.34 with images and a very small one with density of extension of knowledge of the social). In what regards forms and

sources, one sees low correlations with traditional society and high correlations with modern society.

Other clear differences between the two elements of the duality in terms of their correlations with some forms of knowledge can be seen in table below.⁵⁸²

Table B.66 – Correlations coefficients between extension of traditional / modern society and composite indexes for forms of knowledge

| variable | correlation coefficients | |
|-----------------|---------------------------------|----------------|
| | traditional society | modern society |
| description | 0.59 | 0.10 |
| assessment | -0.19 | -0.13 |
| mediation | -0.09 | 0.88 |
| explanation | -0.47 | -0.10 |
| understanding | -0.31 | 0.39 |

Traditional society shows a strong correlation with description (which is very low in the case of modern society) and a strong negative correlation with explanation (also very low in the case of modern society). In turn, the higher mediation and understanding, the higher modern society, with both these two forms of knowledge showing correlations with modern society which contrast with those with traditional society (a very low one and a negative one, correspondingly).

The table below presents correlations between the pair and forms of knowledge in composite terms. As expected given the strong correlation between description and observation, one sees also a strong correlation between observation and traditional society (which is also very low in the case of modern society), while indirect information is highly negatively correlated with traditional society. Reflecting the strong correlation between mediation and modern society, one sees also a strong correlation between this and informants.

⁵⁸² Composite forms results are not redundant relative to structural empathy results because this is worked out based on forms of non-composite knowledge. As such, the corresponding correlations are neither redundant.

Table B.67 – Correlations coefficients between extension of traditional / modern society and composite indexes for sources of knowledge (densities where applicable)

| variable | correlation coefficients | |
|----------------------|---------------------------------|----------------|
| | traditional society | modern society |
| observation | 0.56 | -0.04 |
| reflection | -0.05 | -0.12 |
| indirect information | -0.38 | -0.04 |
| informants | -0.10 | 0.71 |

A conclusion to be drawn from the correlations between the elements of the duality, on one side, and forms and sources of knowledge, on the other, is that traditional society tends to be associated with the personal experience of the writer (through observation, which gives rise to description), something which does not happen with modern society. In the case of the latter, one sees associations with forms of knowledge (mediation and understanding) and sources of knowledge (indirect information and informants) which require a more active epistemological behaviour (in contrast with more passive epistemological behaviour involved in description, although the choice of what to describe and what to exclude from description may be also an active epistemological effort, as said above, the same happening with other forms of knowledge). Specifically, the fact that modern society tends to show up through mediation, which has an extremely high correlation with informants (0.93, as per Table B.52, above) suggest that the voices of people other than the author talk about a modern world and that when the voices of authors talks (that is, in the cases of description / observation) they talk about a traditional world (albeit it should be noted that, ultimately, authors are responsible for including or excluding voices other than their own).

Finally, the consideration of negativeness (table below) sees small negative correlations, except a positive moderate one (0.37) when Franck Arencibia is disregarded. This means that traditional society is (weakly) associated with less negative views for the whole of the corpus and the case where the exclusion is performed, while modern society shows a weak, almost meaningless association with negativeness for the whole of the corpus, but a somewhat solid positive association with negativeness in the case of exclusion.

Table B.68 – Correlations between negativeness and traditional / modern society (in terms of density of extension)

| | whole corpus | Arencibia excluded |
|---------------------|--------------|--------------------|
| traditional society | -0.25 | -0.16 |
| modern society | -0.13 | 0.37 |

Annex C – Max Weber and the distinction between understanding and explanation

It should be noted that the difference between the forms of knowledge *understanding* and *explanation* used throughout this study does not correspond exactly with the difference Weber (1994 (1897)) establishes between

- “observational understanding of the subjective meaning of a given act as such, including verbal utterances”; and
- “explanatory understanding” in which “we understand in terms of motive the meaning an actor attaches to the proposition twice two equals four, when he states it or writes it down, in that we understand what makes him do this at precisely this moment and in these circumstances”, also called by him “rational understanding of motivation, which consists in placing the act in an intelligible and more inclusive context of meaning.”

After presenting examples of actions and their explanatory, Weber writes: “In all the above cases [the examples] the particular act has been placed in an understandable sequence of motivation, the understanding of which can be treated as an explanation of the actual course of behaviour.” This, however, does not render Weber's explanatory understanding (also called rational understanding) identical to the concept *explanation* used in this study, if we consider the examples provided by the German scholar:

We understand the chopping of wood or aiming of a gun in terms of motive in addition to direct observation if we know that the wood-chopper is working for a wage, or is chopping a supply of firewood for his own use, or possibly is doing it for recreation. But he might also be “working off” a fit of rage, an irrational case. Similarly, we understand the motive of a person aiming a gun if we know that he has been

commanded to shoot as a member of a firing squad, that he is fighting against an enemy, or that he is doing it for revenge.

The motifs being internal to the actor, it seems these examples fit the formula “in doing X, the actor is doing Y”, given no external causal element seems to be at work (“actor A is doing X because of Z”, Z being external). In itself the activity of wood-chopping does not seem to need an *external* element of *explanation*. *Explanation* could be needed if we knew, say, the wood-chopper was performing such activity for the first time in years because the corresponding wage had increased, a case which would better fit the second formula.

Thus observational understanding and explanatory / rational understanding are subtypes of *understanding*, as just defined above against *explanation*. (Given Weber (1994 (1897)) makes the distinction between his subtypes of understanding a few pages after his seminal definition of Sociology – “a science which attempts the interpretive understanding of social action in order thereby to arrive at a causal explanation of its course and effects” (also present in his *Economy and Society* (Weber (1968 (1922))), and although he is not explicit on this, one can infer that “interpretive understanding” corresponds to “observational understanding” and “causal explanation” corresponds to “explanatory / rational understanding”).

If is the case, *explanation* would not be present in Weber's definition of Sociology, which would match the view of Weber's method as antipositivist (Rhoads, 1991).⁵⁸³ This view, however, is opposed by Borgatta and Montgomery (2000), who, referring to Weber's “Über einige Kategorien der verstehenden Soziologie” (“Some Categories of Interpretive Sociology”), write:

The most significant attempt to reconcile the two antitheses (understanding / explanation and idiographic / nomothetic) has been carried out by Max Weber. (...) Weber conceived an idea of sociology as both a generalizing, nomothetic and interpretive, idiographic science, arguing for the complementarity of interpretive understanding and causal explanation: that is, a researcher's personal understanding should be balanced by empirical and statistically established regularities of scientific explanation.

⁵⁸³ Section “The Antipositivist Methodology of Max Weber”.

