Leveraging digital and physical spaces to ‘de-risk’ and access Rio's favela communities

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Abstract

Building relationships of trust and mutual understanding between researcher(s), local stakeholder(s) and gatekeeper(s) is widely regarded as a critical factor in successful research. Methodological strategies and tactics are often based on contextual variability and accessing some communities presents a harder and riskier proposition than others. Here we propose an empirically driven and holistic methodological approach for accessing high-risk communities whereby deprivation and criminality characterises everyday living. Following the 'legacy' of both the 2014 FIFA World Cup and Rio 2016 Olympics, this paper charts a research journey by detailing how local perspectives were accessed at the heart of one urban favela in Rio: *Morro dos Prazeres*. The methodological framework is underpinned by leveraging social networks to aid the identification of key stakeholders required to access and bridge the void between researcher(s) and community. Furthermore, creative digital and physical access routes were also employed (including social messaging platforms such as 'WhatsApp') which helped build and maintain trust with highly respected community leaders before, during and after the research. We suggest that our proposed 'Digi-cal model' (reflecting the digital and physical nexus) approach is transferable to similar tourism projects that require sensitive approaches and complex stakeholder navigation in 'high-risk' community settings.

Keywords: Trust, access, gatekeepers, de-risking research, host community, social networks, digital methodologies, Rio.

Introduction

This paper presents a case study analysis conducted by the lead author (referred to as the 'researcher') and supported by two supervisors (the 'co-authors'). As this is a co-authored paper, the majority of the paper is written in the third-person, however, to reflect the

deeply personal nature of the researcher's experiences, the methodological reflection section is written in the first-person alongside field notes and personal reflection. We track the researcher's journey from initial methodological planning to execution, outlining the digital and physical mechanisms leveraged to build relationships with what are often considered hard to reach and closed communities - in this case, Rio de Janeiro's favelas. Specifically, the researcher sought to access perspectives across the socially-excluded and marginalised favela of *Morro dos Prazeres - 'Hill of Pleasures' (Prazeres*). Through analysis of the researcher's fieldwork diary notes, and correspondence between stakeholders and gatekeepers, we explore some of the issues, challenges and access methods experienced by the researcher in the field.

The original aim of the investigation was to explore how favelas respond to economic, social and cultural impacts as a result of Rio's mega event and associated tourism through adopting social and community resilience systems and processes. An undertaking of this kind of research, particularly given the context under investigation, often involves engagement with potentially dangerous, risky, unpredictable and unfamiliar environments. Accessing high-risk research settings in any form poses a series of methodological challenges. Moreover, a critical aspect of existing research methodologies into how researcher-gatekeeper relationships are formed, developed and maintained are limited (Emmel, Hughes and Greenhalgh, 2007; Clark, 2011), with little work offering useful practical strategies to overcome such challenges. Ateljevic, Pritchard and Morgan (2007) argue that there is too much emphasis on identifying the issues and problems in critical tourism research without proposing multi-dimensional and disruptive solutions. Therefore, researchers wishing to voyage into challenging environments must consider strategies and tactics to 'de-risk' the research setting and develop solutions to achieve this.

Shefner and Gay (2002) found that gaining access into favela communities was challenging - taking over two months to access neighbourhood associations to build trust. Furthermore, other studies on Rio's favelas fail to explicate the processes in *how* they gained access into such dangerous and risky environments. For example, Alves and Evanson's (2011) study investigated favela residents' perceptions on the warfare between police and drug gangs. Although they provide a methodological 'note', there is no insight into *how* they did so, but instead briefly mention that the process required long and careful preparation. Notably, Cataldo's (2008) study of the effects from HIV treatment chose the *Morro dos Reis* favela in the *Santa Teresa* neighbourhood as their case study for easy accessibility and guidance from a local health centre team. Although perilous conditions impeded their progress, violence and gang activity evidently characterised their chosen community, highlighting that many researchers seek easier and fundamentally, safer options when accessing favelas.

Favelas, often derided as *'slums'*, are informal settlements spread throughout the city of Rio de Janeiro; a contrasting landscape to the well-known *'marvellous city'* of Brazil. Drug trafficking has plagued the city through two rival and extremely violent gangs - the *Red Command (Commando Vermelho)* and *The Third Command* – who have monopolised favelas since the late 1980s (Steinbrink, 2013; Ramos, 2017), bringing crime and violence across the city and dominating power within many of Rio's favelas due to a lack of state presence (Freire-Medeiros, Vilarouca and Menezes, 2013). Perlman's 2010 study discovered almost one in five families had been a victim of homicide, finding that youth homicide is almost seven times higher within favelas than the rest of Rio. Violence further increased in Rio's favelas in 2017 between gangs and police with shootouts becoming a regular and

unpredictable occurrence. In June 2017, 181 shootings took place in Rio in just one week, highlighting that extreme violence still plagues the city, reportedly exacerbated by its recent mega events (see Strobl, 2017). Since Rio 2016 Olympic Games, 632 people were hit by stray bullets across Rio state - 480 of these died and many were sadly young children (Strobl, 2017). Foreign Commonwealth Office (FCO - see https://www.gov.uk/foreign-travel-advice/brazil/safety-and-security) advise travellers that the security situation is unpredictable and visits to favelas can be dangerous, with specific advice to avoid such areas. This is evidenced in *Morro dos Prazeres* in late 2016, when two Italian tourists accidently strayed into the favela on their motorcycle, one was shot in the head and killed (The Rio Times, 2016).

Concern about safe and appropriate access to communities for research is not unique to favela research. Such approaches also characterise much tourism research, where marginalised, rural and hard to reach areas are often avoided or deemed inaccessible. For example, Nyaupane and Poudel's (2012) study into rural communities and tourism development was compromised by initial reluctant research participants who had previously experienced research where information was simply collected without building relationships. Therefore, they adopted 'rapport' through informal meetings with stakeholders to facilitate participant identification and selection, an often-overlooked approach, as an initial tactic to gain trust and developed an appreciative inquiry in their methodological approach. Accessing vulnerable, sensitive and marginalised populations is a recognised physical and emotional challenge for researchers (see Elliott, Watson and Harries, 2001) – with many time-consuming and challenging barriers to overcome (e.g. identifying and accessing gatekeepers in high-risk places previously only afforded through 1-1 interaction and longitudinal study (before the development of real-time communicative

platforms; e.g. Perlman, 2010; McCann, 2014). Yet, if we hope to gain a better understanding of the impact of tourism and mega-events, de-risking hard to reach and dangerous research settings is an increasingly valuable dimension of the research process if approached sensitively and ethically.

Given that research must approach tourism as a 'multidisciplinary phenomenon' (Decroup, 2004:163), we need to pursue interdisciplinary methodologies (Janesick, 1994), by tightly integrating different research methods that provide clarity and generate richer data for lost and hidden narratives. In looking beyond tourism studies to challenges in gaining access to research participants such as drug-users, the academy can build new knowledge and confidence in its methodological approaches. Therefore, this paper tackles the challenges of researcher access by drawing on multi-disciplinary research from disciplines including health studies and sociology, to identify issues associated with gaining access to high-risk participants and communities.

We outline how researchers can leverage social messaging communications as platforms to identify the key stakeholders required to access and bridge the void between researcher(s) and community. This is then overlaid with a series of creative digital and physical access approaches which include social messaging platforms (SMPs) - mechanisms helping to build and maintain trust with highly respected community leaders before, during and after data generation. The overarching objectives of this paper are to:

1) Make the case for *why* more research is required relating to how researchers can reach risky, often invisibilised host communities to amplify local narratives;

2) Deconstruct the practical digital and physical methods required to build networks, trust and relationships with key gatekeepers and locals within high-risk communities;
3) Serve as a platform for reflection of the researcher's journey, positionality, and personal safety;
4) Synthesise good research practice with empirical insights to develop general and specific principles and practices that disrupt methodological approaches to stakeholder and gatekeeper relationships.

The article is structured into four key sections aligned to our objectives. Firstly, we examine *why* building relationships of trust and mutual understanding is central to gaining access and important for impact studies that tend to exclude and/or marginalise local voices, especially in deprived communities. Secondly, we examine *how* other studies have leveraged digital and physical methods to gain access and de-risk research settings. Thirdly, we examine these questions of *why* and *how* in our context of our research site, *Prazeres*. This section synthesises i) *a priori* propositions, ii) *good practices* identified by other case analyses, and iii) *a posteriori* themes generated from the researcher's empirical analysis, experiences in the field, and subsequent intellectual discussion(s) with co-authors. We present practical methodological considerations required to access high-risk communities whereby deprivation and criminality characterises everyday living in the context of a new model we have termed 'Digi-cal'. This model offers a practical approach to the digital and physical nexus of creative methods used throughout the research process for gaining access into marginalised communities. We conclude by reflecting on the wider generalisability of a more disruptive model for future researchers to utilise and mould to their own unique contexts and situations. We argue that the creative use of digital methods before entering the field helps develop strong relationships early in the research process. Therefore, this

paper seeks to bridge the gap in addressing how such relationships can be fostered to enable quicker access into hard to reach areas, extending past the data generation stage of field research.

Literature review

Qualitative research methodologies within the tourism domain remain contested in their ability to provide dependable, credible and interpretive validity due to its exploratory nature (Wilson and Hollinshead, 2015). Johnson (1997) explicates that interpretive validity is the way in which the researcher portrays and accurately attaches meaning to the '…participants' viewpoints, thoughts, feelings, intentions, and experiences…',. Harris, Wilson and Ateljevic (2007) further claim that researchers must embrace more reflexive and critical forms of academic inquiry in the 'new' postmodern phase of tourism research (Tribe, 2005), seeking more in-depth and complex understandings of what lies beneath the data, e.g. the stories behind them. However, Tribe (2006) notes that the terms 'critical' and 'new' in tourism research could be (mis)construed labels that may cause limitations, often associated with Marxist theory when explaining social processes. Consequently, Ateljevic, Pritchard and Morgan (2007:3) clarify that '…it [critical tourism] is more than simply a *way of knowing*, an ontology, it is a *way of being*, a commitment to tourism enquiry which is pro-social justice and equality and anti-oppression: it is an academy of hope'. Extending this, we explicate that '*a way of being*' is how the researcher positions themselves within the process and how that influences the outcome, e.g. "inquiry from the inside" (see Ospina, 2004:4).

Gaining access: building relationships and establishing trust

Low and Everett (2014) found that access issues are not often explicated for new researchers and are instead presented as strategic issues rather than challenges. Emmel et al. (2007) found researchers apply strategic ways of accessing hard to reach communities but concluded that little research existed in understanding implications of building trust and maintaining relationships between researchers and their participants. Furthermore, they argued that attributes of credibility and trust can be built by the researcher's commitment to understand (and immerse themselves) into the research setting. They base this idea on Kuebler and Hauser (1997), Elliot et al. (2002), and Sixsmith, Boneham, and Golding (2003), who fully immersed themselves within health-based research environments, employing multi-method ethnographic techniques as a strategy of discernibility to build credibility and rapport between them and the subjects of study that they claim would otherwise be invisible and problematic to access. Elliot et al. (2002) employed 'peer interviewers' (established mediators between the drug-users and community drug team), or 'Privileged Access Interviewers' (PAI) (Kuebler and Hauser, 1997), to access their participants (drug-users) that they would have otherwise found difficult to access such 'hidden population' groups. Similarly, Sixsmith et al. (2013) employed multi-ethnographic methods that helped build credibility and maintain trust between them and their research participants within a socially-deprived community. The multi-participatory techniques included activities, walking on site and appearing visible to residents via conversations. Sixsmith et al. (2003) highlighted that access to their participants was time-consuming, with it taking up to twenty-four months to build relationships.

Much research has suggested that the first principle with any social research is the development of trust (e.g. Denzin and Lincoln, 2005). Harrison-McKnight and Chervany (1996) argue that although trust is an important element within social science research, there is little agreement of what 'trust' means despite extensive studies on the topic (Rousseau, Sitkin, Burt, and Camerer, 1998; Schoorman, Mayer and Davis, 2007). However, a clear definition of this elusive concept of 'trust' is missing, with many empirical studies defining it in multitudinous ways across multi-disciplines (Harrison-McKnight and Chervany, 1996; Kerasidou, 2017). Yet, without it, we face barriers to research such as obtaining consent from participants and without this, research becomes difficult, if not impossible. Denzin and Lincoln (2005) argue that building a relationship of trust and mutual understanding between the researcher(s) and gatekeeper(s) is a critical success factor for achieving research aims. However, trust may not be mutual or reciprocal, it can only be developed over time (Schoorman, Mayer and Davis, 2007). Various scholars identify 'credibility' – alongside an empathetic disposition - as equally central for building strong, reciprocal relationships of trust between the researcher and those within the research setting to gain access (Sixsmith et al, 2003). Yet, building trust and applying such attributes are highly dynamic: situational and contextually dependent, requiring differing strategies to access those residing within unique social and economic environments.

According to Kerasidou (2017), trust can take many forms and is situational and contextual. Kerasidou (2017) explains that there are two different forms of trust: i) personal trust which is developed between two people and ii) institutional/a personal/impersonal trust which lies between an individual and institutions; or between two institutions, companies, governments or other large social systems. However, institutional/personal trust is questioned by some, as trust is regarded as a *relationship* that is developed between

two individual agents over time (Mayer, Davis and Schoorman, 1995; Rousseau et al., 1998). Schoorman, Mayer and Davis (2007) argue that trust is an aspect of *relationships* rather than a characteristic and can vary with individuals and relationships. Additionally, they argue that reciprocal linkages in empirical research are rarely referred to in how one's trust may affect another's in return, thereby hoping that future research addresses this area. Accessing any collective unit, from a residential community right through to a business enterprise, requires a level of trust. However, the issue remains in *how* trust is gained.

Trustworthiness: writing oneself into the research

Decroup (2004) claims that the issue of trustworthiness needs to be better considered within qualitative tourism research. Trustworthiness can make tourism studies more rigorous and acceptable to positivist researchers (Decroup, 2004). Schnackenberg and Tomlinson (2016) link trust to the concept of 'transparency' which is presented as a three-dimensional (information disclosure; clarity; accuracy) precursor to trustworthiness, in increasing stakeholder confidence. Transparent approaches in the research process allows the researcher to subjectively report their individual experience as an 'insider' (Finlay, 2002:210). The reflection of 'self' during fieldwork stages of research have increased considerably. For example, Everett (2010) extends the concept of reflexivity into the research field, whereby one must transcribe themselves into their work to ensure the researchers' '*physicality*', '*performativity*' and '*positionality*' can be enunciated. Reflexivity is the relationship between the researcher and research participants and can occur in all forms of research to some degree (Davies, 2007), the deeper the researcher is involved, the more relevant reflexivity becomes (Veal, 2017). However, we argue that reflexivity should also consider the relationship between the researcher and gatekeeper(s)/key informant(s) and

not solely research participants, as they [gatekeeper/informant] are the *actors* at the *core* of access, consequently bridging the gap between researchers and participants. Additionally, Everett (2010) asserts that publishing one's own research experiences from the field is an important element of our own epistemological journeys. These aspects are central in the process of knowledge construction, yet are so often concealed (Spivak, 1988; Feighery, 2006).

Gatekeepers: facilitating access to socially excluded groups

Emmel et al. (2007) claim that gatekeepers play a significant role in facilitating access to socially excluded groups. Their work highlights the range of relationships that exist between gatekeepers and participants which may be either trusting or distrusting depending on whether the gatekeeper is formal, comprehensive or informal. Emmel et al. (2007) propose that formal, comprehensive and informal gatekeepers exist when attempting to access socially excluded groups. Focusing on formal gatekeepers who Emmel et al. (2007:5) characterise as 'those working with the community to achieve a particular end'. Although these authors discuss the relationship between the researcher and gatekeeper, they acknowledge that they do not address *how* this is accomplished and retained. This gap in methodological knowledge is further substantiated by Clark (2011) who asserts that little research exists into researcher-gatekeeper relationships.

It is evident from the available literature that trust is key in gaining access, but the issue remains in *how* trust is built – the academy is lacking in empirical research. Additionally, researcher-gatekeeper relationships are highlighted as playing a significant role in accessing any group (especially socially excluded and marginalised groups), yet there is little evidence

on approaches to building such relationships and nurturing reciprocity of trust within them.

Accessing unpredictable and chaotic communities

Accessing chaotic communities like favelas can be risky for researchers. A notable investigation into accessing favelas is Perlman's (2010) reflective follow-up study to her first study of Favelas in the 1960s. She realised that violence and drug gangs had become a barrier in accessing her intended participants (a limitation not faced before) and acknowledged it to be the greatest challenge facing her and her research team. However, Perlman overcame this challenge through careful negotiated access with the Residents' Associations (mostly run by drug gang leaders) and by raising the visibility of the team with an individual 'kit' consisting of an identification lanyard, T-shirts, and a letter explaining the research to make them visible to residents (Perlman, 2010). Additionally, Perlman (2010) 'de-risked' the research setting by contacting participants on the day of interview to confirm the area was safe for the research team to enter. Perlman (2010) recommended that future studies within favela communities should be conducted in pairs with constant contact between them and the field supervisors to ensure researcher safety (obviously made easier now with mobile phones). Although, mobile phones may be a useful tool for safety, this present study also suggests they provide an effective methodological tool in accessing hard to reach communities.

Leveraging digital and physical methods for access

Traditional approaches to generating qualitative data often involve lengthy *physical access* processes of face-to-face, telephone conversations, or postal correspondence (Saunders, Lewis and Thornhill, 2016). Furthermore, building rapport and obtaining mutual trust and respect between the researcher and participants is also time-consuming, particularly through these rather dated communicative methods (DiCicco-Bloom and Crabtree, 2006). Prior to the internet the world appeared seemingly widespread and socially divided, subsequently intensifying distances between researchers and their intended participants. However, social messaging platforms (SMPs) such as Facebook Messenger, WhatsApp, and direct message functions on Instagram and Twitter, have increased and improved interactions - reducing the time-space distance between people from different geographical areas, permitting digital access into the lives and spaces of others (Côté, 2013; Liu, Ainsworth and Baumeister, 2016).

Given technological changes, gaining access to data can now be provided through internet-mediated access involving the use of different online technologies (e.g. Web, Email, instant messaging, (Saunders, Lewis and Thornhill, 2016). Seemingly, the concept of SMPs as methodological tools is rarely explored for leveraging access into research settings (Côté, 2013) and initiating contact between researchers and gatekeeper(s)/key informant(s) and/or participants. Much of the literature surrounding qualitative research methodologies discusses SMPs as useful mechanisms to facilitate relationships for gathering data, e.g. online surveys (e.g. Henderson, 2011; Kapoor et al., 2018). Furthermore, Côté (2013) highlights that such platforms may help to build and maintain trust with participants. However, the use of online instant messaging services such as WhatsApp, have rarely been adopted and utilised within any methodological frameworks for obtaining access into research groups.

Adopting social messaging platforms (SMPs) to negotiate access

The adoption of SMPs as useful tools in accessing participants and data within qualitative (tourism) research studies is under-explored despite them offering an opportunity to reduce time and accessibility constraints that may not have been an option in earlier longitudinal studies (e.g. Kuebler and Hauser, 1997; Perlman, 2010). However, Saunders, Lewis and Thornhill (2016) suggest that physical access is still necessary before using internet-mediated access routes for negotiating access. This approach is supported by Henderson (2011), who claims that social media platforms can be useful as a primary tool to advance beyond traditional qualitative research methods; helping to leverage [physical] access into hard to reach places. However, Henderson (2011) argues that such platforms may create issues for qualitative research when recruiting participants, by being less rigorous like traditional forms, such as 'screening' suitable participants, potentially running the risk of [SMPs] 'users' not being genuine.

Maramwidze-Merrison's (2016) study promoted the use of social media platforms (mainly Facebook and Instagram) as an innovative methodological strategy for accessing elite organisational participants, considered difficult to access via traditional routes. Social media platforms have been found to enhance a researcher's ability to access participants for both data generation and in building a foundation of mutual trust before entering the field. However, Côté (2013) emphasises that this form of approach carries risk and may inadvertently expose participants and thus breach pre-approved ethical assessments. We recognise that digital approaches may pose a risk in terms of compromising participant anonymity and data confidentiality, requiring rigorous ethical considerations when

adopting such methods. Furthermore, Maramwidze-Merrison (2016) delineated that adopting social media as a methodological strategy remains relatively unrecognised within traditional conformed methods of gaining access such as physical contact; already established relationships; or physical intermediaries (those who know the intended participants) and so should attract more reflective discussion within studies that choose to adopt it.

Methodological approach: the case of Prazeres

In terms of context for this paper, the researcher's main overarching project is an investigation of how favela residents respond to socio-cultural 'shocks' from mega events and associated tourism through adopting social and community resilience systems and processes. The researcher sought to provide *voice* and *narrative* for socially-excluded and marginalised groups, rarely considered within the context of mega event research. Field research was conducted across two weeks in the favela of *Morro dos Prazeres* (see Figure 1) in the touristic neighbourhood of *Santa Teresa* in Rio and adopted multi-method techniques for data generation. Although *Prazeres* is located within a rich and popular touristic neighbourhood, it is still *excluded* from the rest of Rio's society. The police vehicle that sits parked at the entrance to Prazeres warns off any outsiders – making the statement that the favela is not safe to enter. Favelas are chaotic, unpredictable, diverse and culturally rich communities, with many differing in terms of their socio-economic status (Freire-Medeiros, Vilarouca and Menezes, 2013). The socio-economic demographics of *Prazeres* is different to other favelas such as *Maré* (north zone) and *Vidigal* (west zone) as many can access the city to work or sell self-made products (e.g. yoghurt drinks). South zone favelas have suffered less gentrification to other favelas (World Bank, 2012). Additionally, south

zone favelas can access central Rio easier than other peripheral favelas, and although *Prazeres* may appear less marginalised, it still suffers socio-economic exclusion and stigmatism, lacking integration with the rest of society (ISSC, IDS and UNESCO, 2016), as well as domination from the *Red Command* gang and unpredictable violence/shootings.

In the early stages of research, purposive-sampling was used to establish contact with Theresa Williamson (permission given to be named) who recommended Prazeres as a fascinating case study. Theresa is the founder of Catalytic Communities (http://catcomm.org) - a non-governmental organisation working for Rio's favelas, and Rio On (Olympic News) Watch (http://www.rioonwatch.org) - an online news blog that was established to report the Olympic impacts on Rio's favelas; a community reporting platform for favela communities. Theresa explained: "[…] if there's an opportunity to do some research [on Rio's mega event host community impacts], I highly recommend [*Prazeres*], it's a really fascinating case where a lot of them were building […] opportunities around tourism and in an instant it's over." *Prazeres* was impacted by Rio's recent mega-events, from UPP (Unidade de Polícia Pacificadora – Police Pacification Unit) interventions – a strategy for partnership between local-residents and law enforcement (UPP, n.d.) aimed to 'create conditions for social, economic, and political integration of favelas into the city' (World Bank, 2012: 22) - and drug gang/police conflicts that subsequently destroyed many self-made community projects (e.g. *Caminho do Grafite*) and successful tourism initiatives (e.g. *Prazeres Tour - see https://prazerestur.weebly.com)* - destroying the *visibility* they were trying to self-create in a fight against marginalisation.

Figure 1 Location of Morro dos Prazeres, Rio [insert figure 1 here]

The qualitative methods employed included twenty-eight semi-structured face-to-face interviews, and unstructured conversational interviews. Research participants included *Prazeres* leaders/activists; rap singer/songwriters (within *Prazeres*); food/drink/creative entrepreneurs and restaurant/café owners (within *Prazeres*); a hostel manager (next-door to *Prazeres*); a local photographer; and UPP commander of *Prazeres*. The informants were based on a purposive-sample identified by a key gatekeeper, as who would best support the research – it was noted that some residents would not understand the effects of mega events and would associate them with current issues, therefore, unlikely to provide answers to interview questions. Furthermore, they were mainly residents of *Prazeres* who live among daily uncontrollable conflict, potential danger and challenges of social exclusion. Other data generation methods included walking methodologies; observations from daily and touristic activities; photographic imagery; and daily field notes/voice recordings (sections are quoted below to illustrate key research moments).

As identified earlier, researchers have leveraged a range of creative tools, techniques and methods to access high-risk environments (LeBaron, 2015). Favelas are difficult to access social [chaotic] organisations, requiring researchers seeking to undertake empirical and ethnographic methods to potentially risk personal safety (Perlman, 2010). Favela communities can appear on the surface as pleasant and safe, but we argue there are strong hidden contrasts to this. For example, warfare between police and drug gangs often results in innocent local people and tourists being killed and caught up in crossfire or shot for accidently entering a favela (see Phillips, 2017; Ramos, 2017). *Prazeres* is no exception. A daily life occurrence for many favelas is that anyone can find themselves in the middle of such a *'war'*. As the researcher's initial focus was based upon Rio's marginalised favelas and its recent mega-events, *Prazeres* seemed like a worthy case study. However, there were

issues to consider: *How* would the researcher access such a community due to language barriers and safety implications? *How* would the researcher remain safe as a solo-female researcher?

Leveraging digital and physical spaces in Prazeres to access local voices

In this section, we present the digital and physical methods leveraged by the researcher to secure access to local voices and simultaneously de-risk research spaces within the heart of *Prazeres*. The use of gatekeepers and digital methods helped leverage physical access for interviews to take place, allowing the researcher to access individuals more quickly and safely. A central element of this paper is to present some findings on an approach and methodology that proved highly effective and outline personal access techniques that helped cultivate what we have termed a '*digi-cal*' model of access.

At an elementary level, a researcher must identify specific actors existing 'within' a collective unit or 'connected into' an organisational construct (like a community, or a business). In a tourism research context, the main actors are usually regarded as either: i) the *'gatekeeper'*, and/or ii) the *'key informant'*. The gatekeeper, as the name suggests is often situated between the researcher and the researched (Ren, Pritchard and Morgan, 2010) and serves to connect the researcher into a new social group: a facilitative role. The key informant is often (but not necessarily) a gatekeeper and retains a specific role in empirical research: as someone who has current – or - potential access to knowledge which is required of those invoking a purposive sampling technique. Central to purposive sampling is the strategic targeting of individuals or collective groups with access to knowledge that helps the researcher (in part) fulfil their research aim(s). Recruitment of such an individual

is usually expected at the 'ethics approval' stage of research: requiring the researcher to engage in strategic thinking (especially in high-risk environments) and ensure the gatekeeper(s) are appropriate.

The provision of additional facilitators was vital in terms of language, and project leads. As found in Browne (2005) in her adoption of snowball sampling to recruit 'hidden' stories, it is crucial the researcher is able to access participants' social networks to access specific populations. We applied a similar approach and Theresa offered this access (as the exchanges in Figure 2 illustrate). She recommended that "…we've got people [in *Prazeres*] we can introduce you to who were affected by the tourism 'boom' and 'bust'…", subsequently providing an English-speaking contact, a self-made photographer from *Prazeres* and co-director of *CriaAtivo Film School*, who then provided a contact number – it was the number of a man called Charles.

Figure 2: An example of the email exchange between the researcher and Theresa Williamson [insert figure 2 here]

Securing a key informant or gatekeeper usually marks the beginning of a long and enduring journey between the researcher and subjects of study. In this case, the researcher invoked a purposive-come-snowballing sampling technique (Browne, 2006), starting with one highly influential gatekeeper. In this case, this was a man called Charles Siqueira (permission to be named obtained). Charles, originally a professional dancer, became a social entrepreneur and community leader/activist after moving to Prazeres in 2002. He is also a director of the *CriaAtivo Film School* which addresses social exclusion and helps prevent young people entering the violent underworld of drugs, through instilling self-

respect and running grassroots programmes which help create better opportunities for those living in Rio's peripheries. Charles, colloquially described as the 'mayor' of the favela by many, provided not only in-depth insight into the community and its dynamics, but fundamentally served to 'physically' connect the researcher to participants by helping the researcher establish 'virtual' empathy and build trust with them prior to field research.

The reliance upon one key gatekeeper can sometimes be problematic (Clark, 2011), but the in-depth insights and connections that Charles was able to provide meant that the *quality* was more crucial rather than the *quantity*. Charles' well-known reputation in Rio allowed for connections to be made quickly and effectively, that may have otherwise been hindered if using additional gatekeepers. The continual communication between Charles and the researcher, pre- and post-research, meant that the relationship built between them was incredibly strong – a key preparatory tool in accessing less accessible places as identified earlier in the literature (e.g. Alves and Evanson, 2011).

Charles opened access and de-risked the research setting by providing a plethora of participants which included Prazeres locals, UPP commander, Brazil's British Council, social legacy project *CriaAtivo* Film School students and staff, and other community leaders e.g. Morro da Providência favela. The initial contact was through WhatsApp (https://www.whatsapp.com - a key digital tool). This digital communication was maintained over a six-month period which helped to nurture trust and develop a sound relationship between the researcher and gatekeeper. This digital engagement is certainly a transferable method that researchers should look to adopt if they wish to access hard to reach communities. An example of how this online method was utilised via WhatsApp to

build an initial relationship and generate a network is presented in Figure 3 below (screen shot of the WhatsApp messages).

Figure 3 Initial WhatsApp messages and Internet-mediated access to Charles [insert figure 3 here]

Access to hard to reach groups may be simplified and accelerated by adopting an 'Internet-mediated access' approach via SMPs to access gatekeepers and research participants. An additional benefit is that this access gateway is free, but only *if* people have access to the internet. Access to the internet may be a limitation for favelas as they are less likely to have access to the internet as they often lack basic resources, especially those in more marginalised, peripheral favelas. Fortunately, this was not the case in Prazeres where communal internet access is available. Additionally, owning mobile phones is common across favelas, Fabricio (director of *CriaAtivo Film School*) stated that "[…] everyone has a smart phone, the poorest guy has a smart phone, and OK it might not be the best iPhone, but it's a smart phone that takes pictures, does WhatsApp, [he] watches it […]". Essentially emphasising that marginalisation is not always a complete isolation or restriction to technology. By utilising digital platforms, researchers cannot only practically develop early relationships, but generate deeper understandings of local dynamics, challenges, and inter-dependencies. Fundamentally bypassing boundaries and providing ways in which we can access less accessible areas more quickly. Of course, some settings represent a harder and riskier proposition than others, complete with cultural contexts that may greatly differ with the everyday practices and value systems of the researcher. In other words, environments like favelas, represent unchartered and unfamiliar territory that must be navigated otherwise the success of the research and the researcher's safety may be placed at risk.

It was felt that digital platforms offered immediate, personal and convenient vehicles to build relationships. Social networks allow for relationships to be leveraged more quickly. Contact with Charles was established via WhatsApp, who subsequently provided the link to Fabricio who helped finalise plans between the researcher and Charles via email and WhatsApp (Figure 4 and 5). Over five- to six-months, in the lead up to the fieldwork stage (January 2018), the research was discussed and planned to ensure that the fieldwork would be successful. Digital approaches were essential in the set up, but of course, it had to sit with the in-person engagement and interaction.

Figure 4 The snowball effect of WhatsApp: Charles digitally linking the contact details of his partner to the messages [insert figure 4 here]

Figure 5 Leveraging digital methods to prepare the field work research in Prazeres: WhatsApp from researcher [insert figure 5 here]

At this point, we must also reflect on the positionality of the researcher: a young, female PhD researcher who is monolingual with limited understanding of Portuguese language, wider Brazilian and local favela customs. Sitting in a bland-scape of a beige doctoral study room: the very thought of entering what is a very different, dangerous world was both daunting and unnerving. Furthermore, significant socio-epistemological differences (Freire-Medeiros, 2012) between the researcher and the residents of *Prazeres* existed in terms of the researcher's different social class coming from the UK, and significant cultural, lifestyle, and language differences. Yet, the desire to engage in critical scholarship to amplify a 'lost' – and often invisibilised – narrative remained powerful. Early

engagement of local interest in her work through the digital communications platforms was therefore reassuring and set the study up well before physically entering the field. It is important to note, the monoglot anglophone nature of the researcher may have hindered some local narrative and varieties of the native language in translation, however, steps were taken to ensure that minimal context was lost. An English-speaking Brazilian local was recommended by the gatekeepers (a close friend) to help with the interviews and translate verbatim, subsequently reducing the language barrier between the researcher and participants, additionally providing interview notes and explaining any areas that seemed confusing to the researcher. This paper now adopts the first person to emphasise the personal journey taken by the researcher.

Physical access: making the researcher and researched visible

It was vital that I [researcher] was not seen as the '*enemy'* by those who may not welcome unwanted external attention, especially from someone who could have been mistaken as an undercover police officer or journalist, essentially risking my own personal safety. I found myself immersed into an unknown world regardless of being in the safe hands of my gatekeeper. The research could have gone one way or another. This anxiety is evidenced in my field notes from the first day in *Prazeres* (Sunday 14 January 2017):

> '[T]wo young men, no older than sixteen, passed us by, but strangely Charles did not acknowledge them fully, other than a nod in their direction. I found this odd as he had literally thrown his arms around everyone else we had come across on our guided tour until now. I quickly realised that they were gang members, marked by their reasonably large handguns that they had tucked into the waistband of their

> trousers. Remarkably, I felt no fear or concern that we were in the passing company of these individuals and I smiled to acknowledge them with one nodding back in acceptance but his eyes not leaving us until we were out of their sight. I thought to myself, they are so young, something that I found more surprising than fearing them. Anyway, what were they going to do? Shoot me I guess.'

Consequently, the key gatekeeper played a key role in negotiating spaces, and personalities. He offered a form of 'protection' and reassurance from the outset (Figure 6). Charles facilitated access to many parts of *Prazeres* that would otherwise be inaccessible to people from the 'outside'. I engaged with many people sitting outside their homes (even invited to look inside), interacted with gang members, and got a *real* feel for favela life – engagement was not hindered by language barriers – I could see everyone who lived within *Prazeres* was happy and extremely welcoming – no matter who they were.

Figure 6 Reassurance of safety from Charles to the researcher [insert figure 6 here]

Charles managed, recruited and prepped suitable research participants on my pre- and post-arrival in Rio. Essentially, direct contact with the research participants was not made until I physically arrived in *Prazeres*, and sometimes not until the point of interview. I relied on the gatekeeper to act as a mediator and bridge the trust between myself and participants before conducting interviews as I had no means of contacting them beforehand due to language barriers. I adopted Schnackenberg and Tomlinson's (2016) three-dimensional approach (outlined above) to foster transparency and presented each participant with a Portuguese translated (*clarity*) document that consisted of a Participant Information Form (PIF) (*disclosure of information*) and a Participant Enquiry Sheet (PES - *accuracy*). Both forms

clearly provided the purpose of the research, with a consent form, as well as the researchers, supervisor and the University's contact details, for them to agree and sign that they were willing to participate in the study.

As trust was built prior to my arrival in Rio through Charles, I was slightly concerned that the interviews were planned so late into the field research, however, Charles was constantly reassuring me that everything was ready for my arrival. Charles and I planned back-to-back interview and focus group schedules for the coming week on the first working day of research. Charles provided names and occupations of potential participants and their association/position within *Prazeres* that he felt would provide the richest and most useful data. The increased uncertainty of recruiting willing participants who can help generate enough insightful data for a doctoral thesis is a major challenge in locating and accessing research subjects that you believe can provide insights to help address research questions (Low and Everett, 2014).

Indeed, participants can make or break, and even alter the entire direction of research (which can be illuminating, but also unnerving for novice researchers). Ritchie, Burns, and Palmer (2005) rightly point out that research is rarely linear and does not always go to plan, no matter how well designed. I had to be prepared for whatever challenges may have arisen in such an unpredictable setting. For example, on day five of the interviews, the last interview of the day was cancelled, I recall (Thursday 18 January 2018):

> 'The last interview with [participant] was cancelled as it was getting late and the general agreement was to leave, as we would not be with a representative when we

> left the restaurant in *Prazeres*, which is situated at the top of the favela – and it was starting to get dark, so we had to ensure our safety.'

However, this was not a problem, the interview was re-scheduled to the following week. Although the schedule spilled over into the second week, initially intended for touristic observations in Rio, I felt this time was better spent interviewing participants to give voice and narrative for the favela locals – the intended aim of the research. Both myself and Charles were flexible and able to respond to participant needs rather than follow a structured schedule – illustrating the unpredictable research setting increasingly reflected in ethnographic research (Bajc, 2012). We were able to adopt this approach to the planning of interviews as we could stay in contact with each other via WhatsApp remaining flexible and adaptable to change – with accessible transport links to navigate the city easily.

Additionally, I was welcomed and greeted by most residents and perhaps more significantly, the drug gangs and the UPP. By day six, I diarised:

> 'Day in Prazeres – I am starting to feel like a resident myself! Most of my time has been spent here [*Prazeres*], or, if out of the favela, I am with the residents (mainly Charles), the only thing I am yet to do is sleep there!'

The UPP mediator offered his support to me during my time within *Prazeres*. I felt a strong 'sense of belonging' and 'safety', with one of the locals commenting that I was 'like a local'. Similarly, I was warmly greeted by one of the gang leaders in *Prazeres* and told *'to be welcome'* and *'feel safe'* – which came as a relief! The earlier 'investment' of time and (digital) social engagement through the gatekeeper had clearly paid off. Having such a proactive

gatekeeper seems to contradict many traditional forms of research where the researcher is mainly in control of their research. By placing the 'power' with the locals in this instance suggests a form of 'risk-taking' from myself in 'trusting' the gatekeeper to deliver what was effectively 'promised' from over 5,000 miles away via online digital communications. Conversely, it is intriguing how one man's [Charles] trust and respect for everyone, no matter who they are, what they do, or where they are from, *infused* into my approach. His positionality secured 'permission' for the me to access *Prazeres* and then entrust me with one of Rio's many dangerous favelas.

Charles encapsulates the kind of approaches tourism researchers need to be cognisant of, i.e. the time and immersion required to build trust in our field work sites. Charles placed me in a safety bubble by raising visual awareness to other people in the favela of my existence and research intentions. The sustainability and depth of this link was perhaps best demonstrated when Charles sent a Facebook friend request before my arrival in Rio which, along with WhatsApp, have remained communicative vehicles between us since. To emphasise the relationship we built, when asking permission to refer to him as 'Mr Siqueira', he responded with *"Even better you call me Charles. You are my friend, I'm not Mr Siqueira for you."* Essentially, the significance of our relationship is more than just one of access (Crowhurst, 2013), it was a privileged insight into unique and hidden realities that may never have been exposed without the digital formation of mutual respect and reciprocal trust and the beginning of a lifelong cross-cultural friendship.

Discussion and reflections: building relationships across a digital and physical nexus

Punch (1994) argued that to benefit from the richness of empirical work, a researcher must find ways to fully immerse oneself within the research setting to build trust. As outlined earlier, much literature theorises the trust relationship between the researcher and gatekeeper from the perspective of gaining trust from the gatekeeper(s) and/or key informant(s) and it is rarely presented as a reciprocal relationship. We argue here that the tourism researchers' approach in the favelas highlights that trust must be reciprocal between both the researcher and the gatekeeper(s)/key informant(s); and can (and should aim to) extend beyond the fieldwork stage of research (Jobbins, 2003; O'Gorman, Maclaren and Bryce, 2014).

It was noted above that Shefner and Gay (2002) attempted to access favelas but found it incredibly challenging – they had to participate in events to 'persuade' the neighbourhood associations to permit access. Trust clearly had to be nurtured over some time through showing willingness and commitment before they could fully immerse themselves in their research setting. Similarly, and with already [digitally] agreed access, our researcher was taken on an introductory tour of the favela prior to conducting interviews and meeting the participants. The researcher was introduced by Charles to many residents along the way, being made *visible*, in what we consider to be a *safety tactic* that was used, but not initially disclosed to the researcher. This was an indirect way to identify her within the community, so she was known to the locals – and importantly, drug gangs.

Furthermore, transparency was crucial in gaining acceptance within Prazeres (Lincoln and Guba, 1985). According to Punch (1994) in the first instance, the researcher must gain social acceptance from the group they wish to research, referred to as 'social access' by Clark (2011). Clark argues that gatekeepers allow us physical access, but this does not

always translate into social access. However, by Charles being able to introduce the researcher as more of a long-term *friend* than an *external alien* meant social engagement was accepted more easily. This certainly echoes Emmel et al. (2007) who found that a researcher's external 'position' to their participants is important in devising suitable methods to facilitate trust between them. The social separation that exists prior to building trust can be characterised as *distrust* or mistrust.

We found that 'distrust' is often dependent upon different circumstances. For example, during the fieldwork, most people were very accepting and trusting, allowing the researcher to eat in their café and not pay for the next three to four days, after meeting them for the first-time. Perhaps this was down to Charles' already existing relationships between them that emitted *that* trust to the researcher. Social networks (e.g. personal contacts) can be useful channels for gaining access to individuals in hard to reach communities and can 'open-up' 'hidden populations' (Browne, 2005:53). Everett's (2010) 'solo female researcher' (also see Jordan and Gibson, 2005) experience was certainly experienced in this research and there was a mutual experience in terms of interactions between the researcher, not just with participants, but also other locals of Prazeres and Rio. This researcher diary extract from Tuesday 16 January illustrates this:

> 'During a trip to AquaRio today, a tourist attraction in Porto Maravilha, with underprivileged children from the social housing development in north Rio, a young girl of 11 years seemed to be fascinated by me and followed me and showed me various sea life as we walked around the attraction. Although we could not communicate orally due to language barriers, we instead communicated through actions and I felt a close 'bond' between us, the girl seemed trusting of my being.

> At the end of the day trip, she gave me a big hug before we left leaving me with a sense of love and admiration, and more importantly acceptance'.

It is evident that the researchers' early and carefully planned social interaction with her participants, as well as other locals in their daily natural settings, enhanced the information generation. One important dimension was gender – a young solo female researcher entering an economically-poorer setting compared to her own - as Everett (2010:171) indicates in her reflections as a female researcher, this 'may have differed had [she] been male'. On reflection, the researcher may have appeared less confrontational than a man may have appeared to community residents – specifically drug gang members. Furthermore, Gurney (1991:379) suggests that female researchers may appear less threatening and 'warmer' than their male counterparts, consequently aiding such access and acceptance. Sinha's (2017) reflections of ethical and safety issues in sex research, discusses how working as a solo-female researcher proved beneficial allowing women to openly share their views with her rather than NGOs. As researchers we should take time to reflect on our own identities and positionalities, and ensure they strengthen (rather than detract from) our work and research relationships. After all, as Schnackenberg and Tomlinson (2016) find, the three-dimensions of *information disclosure*, *clarity* and *accuracy* must always be considered when recruiting research participants and accessing research environments.

The 'Digi-cal model'

As the methodological planning developed, it became clear that this project could contribute new perspectives to similar studies which seek to advance research beyond

traditional (and safe) practices of (tourism) research design (e.g. Phillimore and Goodson 2004). It was through the development of both digital and physical methods that the research design seemed to situate itself on a 'Digi-cal' (digital and physical) nexus. This model values both digital and physical methods working together and works by finding the most appropriate ways to build trust, transparency and personal insight in potentially high-risk research environments.

On reflection, if it was not for the early digital platforms informing later physical 'in situ' field methods in a complex nexus of methodological design, this research indisputably would have failed to progress which often happens with many academics opting for easier and more accessible research topics, particularly within mega-event studies, marginalising the *voice* of those who are mostly affected. This simple yet effective process is summarised in the 'Digi-cal' model below. At its heart (centre) lies the process of 'digital access' which is necessary to underpin the entire process. The identification of an initial relationship with gatekeepers is initially triggered and then galvanised with SMPs (e.g. WhatsApp). This 'soft' introduction was also important in addressing any gender or cultural complexity or misunderstandings that may have emerged in the design phase. This initial phase of work is then overlaid with the use of digital platforms to develop trust over time and build a deeper relationship of reciprocity and mutual understanding. It is only once the digital spaces of research are in place and set, that it may then be possible to access the physical (and potentially higher risk) spaces of research with reassurance and a degree of confidence and insight. As the researcher progresses from the digital to the physical (in person), a relationship of mutual trust and respect may be established over time in advance of fieldwork. In this study, these relationships extended well beyond the lifetime of the research.

Figure 7: The 'Digical' Model: traversing the digital and physical nexus of research (Authors' own) [Insert Figure 7]

Although this approach would benefit researcher beyond the field of tourism and events research, we argue here that digital platforms offer a more disruptive and under-utilised methodological vehicle for reducing research costs as well as reducing the spatial (and cultural) distances often cited between the researcher, gatekeeper(s), key informant(s) and participants. By completing key advance stages of fieldwork in the digital space, researchers place themselves in a position to be able to leverage quicker access into inaccessible communities, simultaneously building the all-important element of trust between all stakeholders involved.

Conclusions

This paper has sought to make visible the complexity and 'messiness' of the research process in hard to reach environments and highlight new ways that tourism researchers might look to ethically and sensitively embrace difficult to access or 'risky' research contexts (if valuable to the expansion of knowledge and theory). Through the lens of a tourism research study in the favelas of Rio, we have sought to draw on field notes, pre-research planning approaches and internet-mediated communication methods to articulate a creative way to navigate access to participants and places that are usually hard-to-reach, invisible and deemed risky and dangerous.

Although social media is a relatively recent phenomenon and more studies are using it as a data generation vehicle (see analysis by Lu, 2018), it is rarely considered a useful tool for attaining access to key gatekeepers and attracts even less attention as a way of fostering constructive relationships with key informants in qualitative research studies. Our proposed approach based on a real-life favela research experience has identified that without support of such digital and technological advancements, this kind of in-depth tourism research may have been costlier and most definitely more time consuming as relationships would not have been built had it not been for this methodological process being adopted. Aside from qualitative, in-field research we argue that there is also value in utilising digital platforms to advance other methodological approaches in quantitative and mixed methods research which are equally reliant on access to gatekeepers and participants.

In returning to our original objectives, we began by highlighting the limited body of literature on how researchers might seek to access risky spaces and invisibilised host communities; secondly, it has outlined how physical and digital methods can build networks, trust and relationships with key gatekeepers and locals in the context of a favela. Thirdly, with field diaries and social media excerpts we have reflected one researcher's journey, positionality and how personal safety can be reassured by working with well-positioned gatekeepers. Finally, through the adoption of the 'Digi-cal' model, we have aimed to synthesise good practices and offer a simple framework which summarises the principles and practical steps that worked to both accelerate and 'open up' the research process.

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