

Unravelling the complexities of carnivals: potentials and challenges for social change in Mexico

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Abstract

Purpose: This research aimed to explore the complexity of the carnival as a space that both challenges and reinforces social hierarchies, as well as a potential catalyst for social transformation for marginalised groups.

Methodology: Participant observations were carried out at various carnival sites, with a particular emphasis on the "Carnaval de Ixtapan" in Central Mexico in 2024. These observations were supported by photographs and videos.

Findings: The carnival's transgressive nature has led to progress in inclusivity, notably by featuring women and LGBTQ+ individuals in prominent roles, thereby shifting gender and heteronormative dynamics. However, it remains predominantly male-dominated, hindering change and reinforcing existing power dynamics. While cross-dressing challenges societal norms, it can also inadvertently reinforce male supremacy, and LGBTQ+ individuals often encounter resistance to their participation. Despite these challenges, the carnival's temporary, spatial, and purposeful nature provides a platform for social change, offering visibility to marginalised groups and facilitating dialogue on diversity and inclusion.

Originality: This study provides rich insight into the ways in which carnival can be a mechanism for both reinforcing and challenging social norms in Latin America.

Introduction

Cultural events are experiencing notable growth globally and continue to hold significant economic and sociocultural relevance in many parts of the world, including countries in the global south (Pérez-Gálvez et al., 2019; Sansón Rosas and Fusté-Forné, 2018; Snowball and Antrobus, 2020). Among these events, carnivals stand out for their cultural, festive, and celebratory value, as well as their transgressive nature. Through symbolic inversion, the intensification of behaviours, celebration, and liberation, carnivals challenge social norms and hierarchies both spatially and temporally (Medina Cano, 2011), encompassing not only gender norms (Camelo Gómez, 2021; McReynolds-Pérez and O'Brien, 2020) but also racial differentiation and domination (Adamovsky, 2023; Sansón Rosas and Fusté-

Forné, 2018; Spooner, 1996). In these ways, they disrupt the stability of everyday life and create spaces for the inclusion, diversity, and resistance of social groups that have traditionally been marginalised and overlooked.

However, it is important to acknowledge that, despite their liberating aspects, carnivals can also reinforce existing structures of domination and social hierarchies in the societies that host them and among those who participate in them. Through their practices, carnivals may perpetuate social inequalities and cultural norms that exclude certain groups from full participation in the festivities (Córdova Plaza and Huerta Moreno, 2023). Therefore, critically examining the role of carnivals in reproducing or transforming social and cultural dynamics within the communities where they occur is crucial.

Mexico boasts a wide range of carnivals, from those rooted in pre-Hispanic and indigenous cosmology to more urban and touristic ones (Newell and Jiménez Gordillo, 2023). However, despite this cultural diversity, research on the social impacts of these events is limited. Within the few studies in the Mexican sociocultural context, we find, for example, Pérez Garrido's work (2021) on the impact of carnival on prostitution, Córdova Plaza and Huerta Moreno's work (2023) on how carnival cross-dressing impacts heterosexual masculinity and the invisibility of marginalised groups in the country, and Sarricolea Torres's study (2022) analysing how the pre-carnival atmosphere in some parts of Mexico transforms the performance of gender and sexuality within the gay community. Notwithstanding this limited research on the transformation of social practices and relationships, there is a significant gap in knowledge about the dynamics of Mexican carnivals, particularly in terms of the inclusion and exclusion of historically marginalised groups.

This article begins to address this gap through an ethnographic approach. We explore the complexity of the carnival as a stage that both challenges and reinforces existing social hierarchies. Additionally, we seek to understand how carnivals can act as catalysts for social transformation among certain marginalised groups in Mexico. Through this study, our goal is to illustrate how these events can both challenge and reinforce established power structures in some countries of the global south, providing a more comprehensive perspective on the role of carnivals in contemporary Mexican society.

Based on empirical evidence and existing literature, the contributions of this study are significant and twofold. First, it delves into the complex dynamics of inclusion and

exclusion of marginalised groups in carnivals, within the specific context of a developing country like Mexico. Second, it challenges the prevailing perception that carnivals simply reinforce existing power hierarchies, highlighting their potential to destabilise and begin to transform these entrenched social structures.

This article brings a valuable perspective to the field of events and festival studies through examination of the interactions between cultural events and hegemonic structures of power. Specifically, in the context of carnivals, it offers a fresh insight into how these events can serve as spaces of inclusion and empowerment for historically marginalised groups in developing countries. This approach not only enriches our understanding of carnivals themselves but also sheds light on the complex social and cultural dynamics that shape everyday life in diverse and multifaceted contexts like that of Mexico and, potentially, other countries of the global south.

Carnivals and social transgression

Throughout many historical periods and geographic, social and cultural settings, carnivals have provided opportunities for display, posturing, commercial exchange, and socialising. Carnival is about display, freedom, and celebration. Symbolic inversion is an important aspect of the carnival, where social norms and hierarchies are inverted and, albeit temporarily, challenged. Falassi (1987) captured the ways in which festivals and carnivals mark another, often limonoid, time and space in social life:

At festival times, people do something they normally do not; they abstain from something they normally do; they carry to the extreme behaviors that are usually regulated by measure; they invert patterns of daily social life. Reversal, intensification, trespassing, and abstinence are the four cardinal points of festive behavior. (p.3)

This other world-ness of the carnival is one of its great attractions and a key aspect in its enduring appeal across time and cultures. Turner (1987) argued that the ways in which people play are deeply revealing of how cultures work, and carnival is an increasingly important opportunity for play and celebration in ever-more secular societies. Browne and Marsden (1994) suggested that festivals and other forms of collective entertainment "convert the mundane into a symbolic playing field where we act out our innermost attitudes, beliefs and values" (p.3). There is something liberating about these possibilities for transgression that have the potential to transform social practices and relations and may include those normally excluded from public social life.

The transgressive potential of carnival

Russian literary critic Mikhail Bakhtin's work on medieval carnival provides the theoretical basis for most studies of the transgressive potential of carnival. Bakhtin (1965/2009) described carnival as 'ritual spectacle' and a 'temporary liberation from the prevailing truth and the established order' (cited in Renfrew, 2014, p.134). It is a time when hierarchies, ranks and social norms are suspended and life is lived 'inside out'. There is radical potential at the heart of carnival, as it acts as a reminder that authority is not untouchable or immune to change, that other ways of being are possible. Bakhtin (2009) argued that the spirit of carnival is indestructible and it is this spirit which can be identified in many celebrations in contemporary life. He identified four dimensions of the "carnavalesque" which suggest that it may be a space for transgression and social transformation. First, carnival involves free interactions between people, regardless of social status, and thus provides space for them to gather and, potentially, challenge social norms and practices. Second, eccentric behaviour that is normally frowned upon becomes acceptable – even celebrated – in the carnival, thereby illustrating that other behaviours and forms of interaction are possible. Third, carnival provides space and opportunity for that which is normally separate to come together – the old and the new, the high and the low – once again illustrating that the way things normally are is not the only possibility. Finally, carnival is inherently sacrilegious – it is a time for profanity and inversion during which that which is normally held as sacred can be parodied and challenged. For Bakhtin, carnival can be understood as "the spirit of the non-official" 'second life of the people' in its opposition to any conception of truth as eternal and indisputable" (Renfrew, 2014, p.143). Carnival can thus be an opportunity for social change through reversing social norms and structures and a refusal to just accept hierarchies and associated exclusions.

Carnival has become a space of empowerment for marginalised groups, like women, LGBTQ+ communities, racially minoritised groups and disabled people. For example, Serigdou's (2020) study of the Cadiz Carnival in Spain illustrates how carnival can become a space through which feminist groups can advocate for change to challenge traditional gender roles and relations. Similarly, Adamovsky (2023) examines how Black women found opportunities in the Buenos Aires carnival to challenge gender, class, and race barriers. McReynolds-Perez and O'Brien's (2020) study of murga in Argentina suggests that carnivals are increasingly becoming opportunities for women to challenge gendered divisions and reclaim space for disrupting gender practices. Carnival season also often

provides opportunities for LGBTQ+ communities to celebrate and take up public space visibly, in ways that are often limited or even dangerous outside of the carnival context (Stone, 2023). The symbolic inversion of the carnival enables those often excluded from the public realm to take centre stage and, often, be celebrated.

Bakhtin's work has been widely used to inform studies of carnivals and the carnivalesque in diverse contexts ranging from Iranian 'happy plays' (Allahyari et al., 2022), to studies of Pride events (Taylor, 2016), to the evolution of urban festivals (Matheson and Tinsley, 2014). Recently it has also been applied to contexts beyond festivity and cultural celebration to inform analyses of political protests that contain playful elements. Hammond (2020) responds to critics of the concept of the carnivalesque as merely frivolous by demonstrating how serious political protest, such as the Occupy Wall Street movement, can use humour to further serious political causes, inverting and subverting established discourse and drawing in the public and the state machine. Similarly, Shekels (2023) draws on Bakhtin in his discussion of the Black Lives Matter demonstrations of 2020 and the storming of the US Capitol in 2021, arguing that the radical potential inherent in Bakhtin's conceptualisation continues to be useful for scholars investigating subversion in public events. Whether explicitly acknowledged or not, Bakhtin's seminal work underpins most studies of carnivals and social order, including our consideration of Mexican carnivals in this paper.

The limits of transgression in carnival

Although carnivals are often held up as examples of social transgression that highlight alternative possibilities, this is not the full picture. A common critique of Bakhtin's (2009) conceptualisation of carnivals is to question their potential to contribute to lasting social transformation. Carnival can provide opportunity for celebration and symbolic inversion, but it is also a space through which power relations are expressed and reinforced. Historically, women have been marginalised in carnivals, confined to feminised roles of "queen" that symbolically include women, but only those deemed heterosexually attractive, positioning them in decorative roles with little agency throughout the practices of the carnival (Serigdou, 2020). Throughout Latin America, carnivals have been important social occasions that reinforce traditional gender hierarchies, often restricting active participation to men only and involving sexist jokes and cross-dressing, alongside singing, dancing and other performances. For example, in Mexico, in some carnivals, festive cross-dressing reinforces heterosexual and homophobic masculinity, while

rendering invisible the participation of women and the LGBTQ+ community (Córdova Plaza and Huerta Moreno, 2023). In Colombia, the carnival queen symbolises the affluent classes, elegance, and education, and her reproductive role and sexuality are theatricalised, while male domination is recognised and the phallogentric and virile culture of the Caribbean male is valorised (Cantillo Barrios, 2014). Carnivals may be opportunities for marginalised groups to be visually present in public spaces, but they also often contribute to the (over)policing and further marginalisation of whole communities (Ferdinand and Williams, 2018; Louissaint, 2023). A further critique arises from the increasing prominence of commercial interests that displace the original transgressive possibilities with the demands of capitalism (Browne, 2007; Waitt, 2008; Zobel Marshall, 2018).

A further limit to the transgressive possibilities inherent in the carnival relates to its very structure. Carnivals enable moments of authorised transgression, limited in time, space and purpose, and thus may be considered more of a sanctioned opportunity for people to blow off steam in a controlled and limited way than a real transgressive occasion (Eagleton, 1981). However, Picard and Robinson (2006) argue that although this ritualised and controlled transgression represents a weak form of social transformation, it is not unimportant. Following Bataille (1986), they argue that "festivals are ritualised transgressions of the taboo ... only ever temporary but occasions that permit societies to explore the realms of the excluded and the forbidden." (p.7). Carnival may lead to the inversion of social hierarchies and the norms and relations of power on which they are based, but this inversion is time-bound and limited to the spatial, social and political confines of the carnival itself. Although this may inhibit the potential for more lasting social transformation, it does at least illustrate the possibilities of doing things differently and this in itself is an important step towards social change. Carnivals are but one part of wider culture and social transformation will not come solely through the carnivalesque and cultural practices of the people. However, carnivals can and do play important roles within these wider social and cultural movements and thus provide a helpful focus for beginning to identify possibilities for transgression and social transformation within particular historical, social and cultural contexts (Humphrey, 2000).

These differing views about the potential of carnival to represent change and transformation illustrate its ambivalence and potential to both subvert and reinforce existing social structures (Henry and Plaza, 2020). Carnival thus brings to the fore social,

economic, political and cultural questions that may both reinforce existing power structures and lead to increased scrutiny and subsequently change, whether that be top-down (such as questioning the dominance of established elites) or bottom-up (through disrupting binarisms of gender, race, class and the state) (Crichlow and Armstrong, 2012). In this paper we focus on moments of bottom-up disruption wherein marginalised groups find space for voice and visibility, and consider the extent that this provides opportunities for wider social transformations beyond the limited social, spatial and cultural confines of a carnival in central Mexico.

The setting

Marginalised groups in Mexico

Despite various public policy initiatives to foster the inclusion of marginalised groups in recent years (CONAPRED, 2022), discrimination persists in contemporary Mexico. Ordoñez Barba (2018) points out that, in addition to economic poverty, there are other intrinsic attributes of individuals that are reasons for discrimination, thus contributing to reinforcing prevailing patterns of inequality. According to the author, among the groups most affected by discrimination in Mexico are sexual minorities, who face injustices in the workplace and access to social services, programmes, and public spaces. Similarly, people with disabilities continue to face exclusion in medical and educational services, as well as environments of violence, disdain, and rejection when participating in group activities. Recognising that exclusion and violence against people with disabilities are practically invisible phenomena in Mexico, Human Rights Watch (2020) revealed that these individuals are often victims of extreme violence and neglect both within familial and institutional settings. Additionally, the report showed that state policies limit the ability of people with disabilities to live independently, due to insufficient economic support from the government, as well as restrictions in terms of employment opportunities, housing, transportation, and access to justice.

Ethnic minorities, women, and older adults are also among the marginalised and vulnerable groups in Mexico, facing discrimination, lack of protection, dependence, violation of their human rights, and labour segregation (Mercado Ibarra and Cuestas-Caza, 2019). Discrimination, both structural and interpersonal, hinders the exercise of rights and freedoms in various areas of life in the country, including spaces for cultural celebration, such as carnivals.

A panorama of carnivals in Mexico

Mexico holds a wide variety of carnival practices (Newell and Jiménez Gordillo, 2023). Carnivals not only enrich the cultural wealth of the country but also reflect the complex interconnections between the traditional and the contemporary in Mexican society (Herrera Carrasco and Zavala Hernández, 2015). Carnivals in Mexico represent festive and entertainment events and hold profound sociocultural and symbolic significance. Historically, these events have been used as spaces to uphold certain social hegemonies. For example, in northeastern Mexico, manifestations such as "el encierro de los burros" (the donkey enclosure) serve as scenarios where festive cross-dressing reinforces heterosexual masculinity roles, often in a homophobic and violent manner, while simultaneously rendering invisible the significant participation of other groups, especially the gay community and women (Córdova Plaza and Huerta Moreno, 2023).

Contrarily, in several cases, carnivals in Mexico have served as a platform for various historically marginalised groups to achieve visibility and inclusion. Specifically, women have increased their leading participation in the organisation and execution of some carnivals, thus challenging the patriarchal structure deeply rooted in Mexican society (Alberti Manzanares and Nava-Ramírez, 2020; Herrera Carrasco and Zavala Hernández, 2015). On the other hand, the gay/homosexual community has found opportunities for expression in carnival festivities. Through dance rehearsals for the floats and "bold" cross-dressing, homosexual bodies are empowered by representing alternative expressions of gender and sexuality beyond the everyday (Sarricolea Torres, 2022). Due to the current social change in attitudes towards sexual diversity in Mexico, the terms "homosexuality" and "homosexual" do not necessarily carry negative connotations, unlike in other cultures. Instead, they can also be associated with positive concepts and meanings (Lozano, 2009). Therefore, this article will use both terms in this latter sense.

Carnaval de Ixtapan

Carnaval de Ixtapan was selected as the setting of this study. Taking place in central Mexico, this celebration is estimated to date back approximately 150 years, making it one of the oldest carnivals in the eastern region of the State of Mexico. Historical records and oral traditions suggest that the carnival emerged from a blend of pre-Hispanic customs, festivities, and rituals, intertwined with Christian religious influences from the Spanish conquest and the French invasion, as well as inspiration from similar festivities in

neighbouring states (Mizra Docs, 2023). This cultural event has undergone both tangible and symbolic transformations throughout its history.

The carnival celebration primarily focuses on the execution of public dances to the rhythm of live wind band music performed by groups of dancers known as "cuadrillas". These cuadrillas, mostly composed of pairs of men, play specific roles behind their costumes. Through masks and costumes, some adopt the role of "viejos" (males) while others, through cross-dressing, portray the "viejas" (females), in a parody of the European upper classes in past Mexico. The role of the men participating in the cuadrilla performance is primarily to dance in pairs and groups, with each having their own steps within the choreography, both viejos and viejas.

The carnival celebration in Santa Isabel Ixtapan commands significant public attention. Led by "cajeros" (cashiers), who may be either viejos or viejas tasked with fundraising, the cuadrillas traverse the town's streets, performing traditional choreographies to live music over the three days preceding Ash Wednesday on the Catholic calendar: Sunday, Monday, and Tuesday. Along their route, they visit various households, offering their dances in exchange for financial contributions and the hospitality of the hosting families, often including food and alcoholic beverages. These collected funds are allocated to cover the expenses associated with the cuadrilla's participation.

In the local linguistic and traditional sphere, the term "carnaval" is used to refer to the performances of the cuadrillas. However, the carnival festive season in the community encompasses other events that traditionally accompany the carnival representations. For example, on Carnival Tuesday, "la Arriería" takes place, a regional historical representation where men on horseback ride through the streets of the town and its surroundings. Additionally, the Sunday following the carnival features the "el Toro" (the bull), a parade in which people dressed in typical Mexican attire, mostly, participate alongside two men representing the bulls, knocking down the dancers in exchange for monetary contributions from the spectators. Finally, the following Sunday, "la Viuda" (widow) is celebrated, where a group of disguised participants, including popular characters, parade through the streets of the town. These three events, accompanied by live music, enjoy wide acceptance and popularity among members of the local community.

Beyond its reputation for vibrant costumes, lively choreographies, and infectious music, the Carnaval de Ixtapan embodies a distinct sense of community and identity. Locals

simply refer to it as "carnaval" (without the definite article), making it the most anticipated event of the year, often surpassing even the patron religious celebration. This dynamic has drawn criticism and rejection from local ecclesiastical authorities, a pattern observed for centuries in other regions of the country (Sánchez Ulloa, 2020). During carnival, it is common for many local residents to choose not to attend school or request days off from their jobs. In this way, the carnival not only holds a celebratory and recreational value but also encapsulates a deep cultural and identity significance, thus exerting a notable influence on the transformation of practices and social relationships in the public sphere.

Methodology

This study adopted a qualitative approach to explore the complexity of the carnival as a space that challenges and reinforces social hierarchies, as well as a potential catalyst for social transformation for marginalised groups. Qualitative research focuses on understanding the social world and its dynamics through the interpretation of participants, based on a constructivist ontological position that recognises social properties as the result of interactions among individuals, and not as phenomena "out there" and separate from those involved in their construction (Bryman, 2012). This approach allows researchers to immerse themselves in the perspectives and perceptions of individuals and groups, delving into how individuals organise and attribute meaning to their experiences and everyday practices (Berg, 2001).

Conducting research in close proximity to the target group offers a comprehensive understanding of the phenomenon being investigated. Ethnographic approaches, in particular, provide researchers with the opportunity to fully immerse themselves in society, studying individuals in their natural environments through methods that capture social meanings and daily activities, thereby involving the researcher directly in the environment to systematically gather data (Bryman, 2001). Given that events are sociocultural constructions, ethnographic approaches facilitate the understanding of the symbolic nature and meaning of carnivals. They reveal both the richness and the cultural complexity inherent in them, as well as how social actors perceive their reality and what they consider crucial in their lives. These aspects are often excluded by positivist approaches. As Jaimangal-Jones (2014) asserts, "ethnography facilitates insights into and analysis of events and the cultures which surround them through exploring and understanding the cultural worlds of participants and providing a more holistic context

to their study" (p.52). Rather than conducting a full ethnography, this study employed an ethnographic approach as a broad methodological framework to explore and interpret the cultural practices and meanings of the carnival within its social context.

Considering that carnivals should be studied from within the communities that created them (Medina Cano, 2011), we chose to employ a multi-sited ethnographic approach. Multi-sited ethnographic approaches seek to explore cultural variation and similarity through research in various environments and contexts, rather than being limited to a single group that may be restricted in temporal and spatial terms (Mathews, 2018).

Fieldwork was conducted in the State of Mexico, one of the 32 geopolitical entities of the Mexican Republic, hosting a series of carnivals that are part of its deeply rooted cultural traditions. Participant observation, as an ethnographic method (Jaimangal-Jones, 2014), was adopted as the main research method. Participant observation serves as a means to become acquainted with the subjects of study by actively or passively engaging in sociocultural interactions (Mathews, 2018). The type of observation adopted was moderate, as described by Spradley (1980), where the researcher engages in the study phenomenon to a limited extent, focusing attention on observing rather than actively participating in social dynamics.

Observations were conducted at 14 carnivals with different locations in the eastern zone of the state. These events were selected based on geographic accessibility and their proximity in timing to the study period. The multi-sited approach allowed for the identification of differences and similarities in the various carnival-related practices in these contexts. Most of this work was conducted in "Carnaval de Ixtapan", which is the focus of this paper and with which the lead researcher has maintained a close connection for the past 15 years. The selection of this particular event was based on its diverse practices, which provided an ideal space for analysing challenges and reinforcement of social hierarchies.

For the purposes of this article, systematic fieldwork was conducted between the months of February and April 2024. Fieldwork included observations, descriptions and collection of photographs and videos. The use of ethnographic approaches in the study of carnivals is well justified by previous research that has applied similar methodologies in festive contexts. A notable example is Pielichaty's (2015) work, which examined gender negotiation at the Glastonbudget carnival in Leicester, UK. In her study, Pielichaty adopted

a participant observation perspective, taking on a "pure participant" role by integrating herself into the festival environment while dressed in a costume. This immersion allowed her to experience firsthand the dynamics of the carnival space and capture how gender relations manifest in this context. Additionally, she used photography as a non-intrusive method of documentation, enabling her to effectively record the everyday behaviour of attendees and the interactions that occurred during the event.

In total, 33 observations were conducted during the period. The observational work and collection of information centred on the multiple social relationships and practices among diverse social groups, with a particular focus on women and members of the LGBTQ+ community. Specifically, the aim was to identify relationships and practices that symbolically challenged or confirmed social norms and hierarchies in the Mexican context. Since opportunities for social change not only arise during the public execution of the carnival but also in the dynamics of its organisation and other dimensions (Alberti Manzanares and Nava-Ramírez, 2020), the observational work addressed both the organisational and performance stages, as well as other dimensions such as the opportunities for observation and commerce generated by carnival activity.

Each of the observational records, as well as the visual evidence, underwent collective discussion and analysis by the research team, moving iteratively between data and concepts drawn from the literature as discussed above (Tracy, 2013). Each of the descriptions, photographs, and videos obtained was first analysed individually and then collectively by the research team, assessing the cases, arguments, and examples that could potentially represent a shift in hierarchical social relationships and their implications for the social transformation of marginalised groups. Subsequently, the identified cases, descriptions, and examples were categorised into transgressive possibilities and constraints on transgression within the carnival, in accordance with existing literature propositions.

As interpretivist researchers, we sought to ensure the trustworthiness of our research approach and subsequent analysis in order to reflect the experiences of our research participants and the community that form the focus of our study (Rose and Johnson, 2020; Johnson and Parry, 2015). Trustworthiness was ensured by pursuing the criteria of credibility, transferability, dependability, and confirmability, as suggested by Bryman (2012). Credibility was sought through the use of diverse data sources, namely participant observation, informal conversations, and photographic and video evidence, along with

detailed note-taking and verification of findings' accuracy with a native participant of the community who has been involved in the carnival for over 23 years. Transferability was pursued through thorough and detailed descriptions of the observed relationships and practices. Dependability, in turn, consisted of an 'auditing approach' that maintained complete records of site selection for observation, field notes, photographs, and videos as phases of the research process, allowing for monitoring of the procedures followed. Confirmability was ensured through ongoing reflection on the personal values of both researchers and efforts to minimise their influence on the study, aiming to reduce potential subjectivity as much as possible.

Although the adopted ethnographic approach allowed for obtaining thick descriptions from observations, it inevitably faced challenges and limitations. The fluid and dynamic nature of carnivals made it difficult to comprehensively capture all relevant aspects of the phenomenon, and researchers may have struggled to balance participant observation with the need to maintain a reflective distance for objective data interpretation. Moreover, the ethics of conducting research in festive and communal settings posed ethical challenges, such as safeguarding the privacy and confidentiality of participants in a public and celebratory context. Nonetheless, throughout the research process, we endeavoured to maintain a thoughtful and careful approach, ensuring the protection of social actors' identities and addressing the ethical implications inherent in ethnographic approaches.

In the next sections we present findings from our study exploring carnival as a site for both reinforcing and challenging cultural norms and power structures within contemporary Mexico.

Findings

The Carnaval de Ixtapan emerges as a space of inversion, intensification, celebration, and liberation, where opportunities for transgression are opened, thus allowing the possibility of generating social changes, including the promotion of inclusion and diversity. However, there are also forces that restrict these opportunities and condition or limit the possibilities of restoring social practices. In the following sections, we explore first the possibilities of transgression and inclusion, followed by the factors that restrict these opportunities, reflecting the ambivalence of carnival as a space of both transformation and fortification of existing power relations.

Beyond boundaries: exploring transgressive possibilities in Carnaval

The carnival is a celebration that encompasses various elements that challenge the established social norms in everyday life. Among these aspects, excessive alcohol consumption emerges as a prominent feature, present not only in the Carnaval de Ixtapan but also in numerous similar events observed in other study locations. During the three days of celebration, alcohol is widely available, being sold through the informal economy in the streets and consumed in the streets and households hosting the cuadrillas. This practice becomes common among the members of the cuadrillas, as well as among accompanying individuals and spectators, mainly men, although the participation of women in this consumption is also observed.

The appropriation of public space by the cuadrillas and the festive atmosphere of the carnival also encourage the transgression of established social norms. The cuadrillas occupy both main and secondary streets of the community according to their own desires and performance needs; during their processions, accompanied by music, dance, alcohol, and enthusiastic followers, the cuadrillas challenge the conventional use of public space. Even in the presence of public security forces, the carnival allows for alcohol consumption at any time of the day, street closures, interactions with strangers, revelry, pushing, altercations, and even (discreetly) urination in public places.

The procession of one of the cuadrillas through the streets of the town had just begun, around 10 am. Viejos and viejas danced in two rows, one of viejos and the other of viejas, occupying the entire width of the streets. The cuadrilla's performance blocked the traffic of cars as they danced, causing vehicles to take alternate routes. A passing patrol had to stop to watch the cuadrilla dance. The cashier approached the police officers to greet them and request their financial support. (Field notes, 3rd February 2024)

The excerpt highlights the festive nature of the cuadrilla's procession, emphasising its ability to disrupt the normal flow of daily life, as seen through the blockage of traffic and the police officers' diversion to watch the dance. This aligns with Azor's (2006) interpretation of carnival as a time of symbolic inversion where social norms are temporarily suspended. The participation of the viejos and viejas, alongside the interaction with the police for financial support, underscores a communal celebration that challenges established hierarchies and invites engagement from authority figures in a playful context. Thus, the procession serves as a manifestation of carnival's potential to both entertain and subvert societal order, providing a space for communal identity and expression while momentarily escaping the constraints of everyday life.

Through cross-dressing, the Carnaval de Ixtapan challenges traditional gender expectations. Representations during the carnival are mostly carried out by men, who take on specific roles. The viejos don colourful and elegant suits, complemented with masks, hats, and canes. On the other hand, the viejas are also men, mostly heterosexual, who dress as women; through the use of tight and short dresses, simulated breasts, stockings, makeup, wigs, and umbrellas, these men represent and occupy the female role in the pair. Both the role of viejo and vieja can be performed by men of various ages, including adults, youth, and children (see Figure 1).

Figure 1. Through cross-dressing, the carnival challenges traditional gender expectations (Photo by Javier Pérez, 2024)

During one of the nighttime parades, over 100 couples dressed as viejos and viejas could be seen. Viejos wore colourful and diverse costumes, with almost no repetition among them. The masks of viejos matched their outfits, creating a competition for the best costume and colour coordination. Men dressed as viejas also displayed a wide variety of dresses: some short, others a bit longer, all coordinated with the colours of the viejos' costumes. Many wore wigs, makeup, and carried umbrellas that added additional diversity of colours to the cuadrilla. Men of different ages and builds participated, including elderly men over 50 and children, all dressed as viejos or viejas alongside their respective partners. (Field notes, 11th February 2024)

The nighttime parade showcases over 100 couples dressed as viejos and viejas, highlighting the creativity and diversity of their costumes. This vibrant display fosters communal celebration and encourages participation from various ages and identities. While cross-dressing can carry sexualised connotations (González Romero, 2021), the carnival's unique boundaries allow such expressions to exist apart from homosexual identity. Córdova Plaza and Huerta Moreno (2023) note that feminine attire in this context conveys distinct festive meanings, enabling participants to explore gender roles playfully. Ultimately, the parade exemplifies how carnival creates a space for joyful expression and community engagement, challenging cultural norms while fostering a collective identity.

The participating members of the LGBTQ+ community, particularly gay men and transgender women, often assume the role of viejas in the carnival. In contrast to heterosexual viejas, homosexuals tend to adopt a more pronounced femininity in their cross-dressing and behaviour. This is evidenced in the following observation recorded after Carnaval de Ixtapan:

One of the [Carnaval de Ixtapan] cuadrillas was invited to take part in the parade that kicked off the carnival festivities in a nearby town. Among the participants, two transgender women participating

as viejas stood out; they wore tight, short dresses (one blue and the other red), stockings, long wigs (one blonde and the other black), high-heeled shoes, carried handbags, and had very refined makeup. Their manner of walking, speaking, and dancing was delicate, distinguishing their femininity from the other viejas in the cuadrilla. (Field notes, 17th February 2024)

This manifestation of male homosexuality through cross-dressing can be challenging for heterosexual men and women, as noted by Quijano Sosa (2023), as it questions the culturally arbitrary nature of the gender binary and may be perceived as an affront to masculinity by heterosexual men. However, for the latter, cross-dressing for carnival purposes does not pose a threat to their gender identity. Even so, the inversion of gender representation by men, whether heterosexual, homosexual, adults, youth, elderly, or children, publicly highlights the existence of other possibilities of expression that challenge prescribed norms, inhibitions, and restrictions of masculinity and heterosexuality.

The Carnaval de Ixtapan, like other similar events in the region (e.g., Herrera Carrasco and Zavala Hernández, 2015), has historically been a tradition dominated by the male sphere. However, its evolution and various dimensions have provided opportunities for the inclusion of women. Women can play roles ranging from participating in local business activities and organising the carnival to taking on the role of viejos through cross-dressing or protagonistic roles, such as that of queen, albeit a highly feminised performance.

The presence of a young female couple in the cuadrilla was noted: one dressed as a viejo and the other as a vieja. Their dancing style was noticeably more delicate compared to the male couples. On this windy day, the vieja held onto her dress to keep it from lifting... The remaining participants in the cuadrilla were all male. (Field notes, 3rd February 2024)

Thus Carnaval de Ixtapan has evolved to include women in various roles. This shift allows for a broader expression of identity and involvement. The presence of a young female couple in the cuadrilla, with one dressed as a viejo and the other as a vieja, highlights this inclusion. Their dancing style, described as more delicate than that of the male couples, suggests an interplay between traditional gender expressions and the evolving roles of women in the carnival. The vieja's effort to hold her dress on a windy day further emphasises the nuanced performances of femininity within this festive context. Overall, this evolution reflects a changing dynamic in which women can engage more fully in the cultural traditions of the carnival.

While in other localities women's groups had already been formed as a way to negotiate

the limitations imposed by male dominance in dance performances (Herrera Carrasco and Zavala Hernández, 2015), the Carnaval de Ixtapan initially had only male-led groups, following established tradition. However, in its 2024 edition, one of the oldest and most rooted cuadrillas in the community took the initiative to create the first women's cuadrilla. This cuadrilla allowed the role of vieja to be occupied exclusively by women, while the role of viejo could be assumed by cross-dressed women or men. Participation included women of various ages, including girls, and different body types, making this initiative an inclusive space in terms of gender, age, and body diversity, generating a change of inclusion, albeit temporary, from the grassroots up. The number of female participants (around 20 couples at the beginning of the day) in what constitutes the first all-female cuadrilla in the history of the Carnaval de Ixtapan was surprising, and the overall response from the local community was positive. The positive attitude of the community was evidenced not only through supportive comments and favourable reactions on social media but also by the number of supporters who accompanied them and the families who welcomed the participants into their homes during their journey. These significant and symbolic changes reveal the dynamic nature of the carnival, demonstrating that it is in constant evolution (Sansón Rosas and Fusté-Forné, 2018). In this process of transformation, opportunities arise for the inclusion of groups that have historically been marginalised.

The LGBTQ+ community also plays a significant role in the dynamics of the carnival, although it is mostly gay men who, due to the event's marked masculinity, enjoy greater visibility and prominence within this community. Their presence and participation are notable in the organisation, anticipation, and execution of carnival events. Although most of them assume the role of vieja, a few transition between both roles.

One of the prominent and highly visible positions is that of the LGBTQ+ queen. Alongside the youth and child queens (played exclusively by cisgender young women and girls, respectively), the LGBTQ+ queen completes the carnival's royalty. According to observations, being a queen, including the LGBTQ+ queen, holds significant social value that reflects not only beauty, popularity, and one of the most prominent roles in the carnival, but also a social status that only some people can aspire to. The LGBTQ+ queen has been represented by a member of this community in a female role, implying cross-dressing that is not necessarily limited to the festivity but responds to non-normative gender identities.

On the day of the presentation and public coronation of the three queens, the cuadrilla, accompanied by a live band playing music and many supporters, arrived at the home of the LGBTQ+ queen. The LGBTQ+ queen is an openly gay young man who identifies as male and has no objection to being referred to in the feminine during her role as queen. She had been preparing for her coronation for months, including following a special diet to maintain her body weight. She was wearing a long shiny black dress, high heels, a blonde wig, and makeup... When the LGBTQ+ queen made her entrance, everyone welcomed her with applause and joy. The three queens, including the LGBTQ+ queen, paraded through the village streets with live music, and it concluded with the coronation on one of the main streets surrounded by many supporters who enthusiastically backed the LGBTQ+ queen. (Field notes, 28th January 2024)

In this way, the visibility and prominence achieved by the gender-diverse queen challenge the heteronormative and cisnormative structures that prevail in much of the country (Monterrubio et al., 2020).

The figure of the LGBTQ+ queen, like the other queens, holds an idealised place for women and members of the LGBTQ+ community. For some of them, becoming a queen is an aspiration, and achieving it represents the fulfillment of a dream. Being a carnival queen goes beyond mere theatricalisation; it involves the creation of a fictional spatiality whose composition is influenced and energised by others' perception. It is a symbolic construction in a dynamic space where the actions blur the boundary between the real and the imaginary, and this fusion is consciously experienced (Azor, 2006).

Navigating limits: constraints on transgression in Carnival

Although the carnival under study has served as a space to challenge socially established hierarchies and, therefore, for the potential inclusion of certain social groups, there are both structural and interpersonal restrictions that condition and limit a change in social structures and dynamics.

One of the restrictive factors of the carnival's transgressive potential is the male, heterosexual and cisgendered dominance. Mostly, heterosexual and cisgender men occupy central roles in various facets of the carnival, including organisation, collection and management of financial resources, performance, and music. Although women and members of the LGBTQ+ community have gained visibility and prominence in the carnival, their participation in various dimensions and levels remains restricted.

During a pre-carnival organiser meeting where significant decisions about carnival queens were made, 15 people gathered in the office. Out of these, 12 were men and only three were women (the mother of the LGBTQ+ queen, the mother of the child queen, and the hat-selling lady). Outside the

office, approximately seven men from the cuadrilla were socialising and drinking beer. The decisions were predominantly made by the men. (Field notes, 7th January 2024)

The carnival's transgressive potential is limited by the dominance of heterosexual and cisgender men, who primarily control key roles in its organisation and decision-making. Although women and LGBTQ+ individuals have gained visibility, their participation remains constrained. This highlights the ongoing challenges faced by marginalised groups in achieving equal representation within the carnival.

Furthermore, in the case of the women's cuadrilla, men are allowed to play the role of viejos, and the cajeros, whether dressed as viejos or viejas, are men. These negotiation dynamics are not observed in all-male cuadrillas. Additionally, the musical bands accompanying women's cuadrillas are exclusively composed of men.

The women's cuadrilla began their march around 10 in the morning. Approximately 20 couples were estimated, with women of various ages and body types. There were few women wearing tight, very short dresses, akin to those worn by cross-dressed men. Although some of the viejos were cross-dressed women, most were men, relatives, or friends of the participating women. Two men dressed as viejas led the cuadrilla, setting the route, choosing houses where they would stop to dance, and collecting monetary contributions. (Field notes, 25th February 2024)

This suggests that even in scenarios where women have achieved greater prominence, men continue to maintain a leading role, especially in more symbolic areas such as the concentration of economic power. As Herrera Carrasco and Zavala Hernández (2015) point out, this carnival seems to implicitly establish socially entrenched masculine rules, without the need for official agreements.

Although cross-dressing challenges binary gender norms, the appropriation of femininity by men can also serve as a mechanism that reinforces male supremacy. It is common for heterosexual men who cross-dress to do so without a true identification with femininity. In some cases, they may even consciously exaggerate feminine traits, which can lead to the ridicule and caricaturing of the female figure, thus placing women in an inferior position.

Similarly, many men who cross-dress maintain their masculine traits intact. Even when dressed as viejas, they still exhibit behaviours associated with traditional masculinity, such as excessive alcohol consumption, strength and aggressiveness in dancing, shouting, whistling, and traditional masculine ways of dancing, greeting, speaking, sitting, and urinating, among others.

On the first day of carnival in the neighbouring town, viejos and viejas dance different choreographies to the rhythm of traditional carnival music. Some dances are performed in pairs while others in groups. In one choreography, viejos and viejas hold hands, pull and push each other strongly, with one vieja falling to the ground... Another piece concludes with viejos lifting viejas; once in the air, some viejas spread their legs without concern for showing their underwear. (Field notes, 2nd February 2024)

These behaviours are recognised, accepted and legitimised by other heterosexual men participating in the carnival. As noted by Córdova Plaza and Huerta Moreno (2023), in carrying out this gender inversion, cross-dressing men update and reaffirm their own masculinity, even when it may seem like they are challenging established gender norms.

Similarly, although the LGBTQ+ community participates in the carnival, their presence can be subject to ridicule. The extravagant dresses, flashy makeup, high heels, and highly feminine behaviours often arouse curiosity, questioning, and discomfort, leading them to be perceived as odd and, ultimately, rejected and ridiculed by many men and women. Unlike heterosexual men, homosexual men who cross-dress reinforce stereotypes associated with homosexuality. In these cases, homosexual cross-dressing does not contribute to the inclusive purpose of the carnival in terms of gender and sexual diversity, but rather reinforces hegemonic models of power and heteronormative and cisnormative exclusion.

This concurs with Quijano Sosa's (2023) assertion that the carnival oscillates between normality and abnormality, generating discourses that can be both integrative and discriminatory. The carnival can serve to denounce the symbolic violence present in aggressive discourses directed at minorities, revealing the power relations underlying these discourses, or it can simply reproduce and reaffirm what is already established, thus maintaining the social order based on norms and rules that apparently seek balance.

Similarly, the temporal, spatial, and thematic delimitation of the carnival restricts its permanent transformative capacity. Although the organisation and anticipation of the carnival persist for several months of the year, Carnival is publicly manifested only once a year for three days. The carnival is often perceived as a period of fun that lies outside normal social life, which can lead to its messages of transgressing social norms and challenging hegemonic power structures being overlooked or minimised as mere entertainment and jests.

However, this does not imply that the potential effects of the carnival are irrelevant due

to its temporal and spatial limitations. Being a cyclical and repetitive event (Medina Cano, 2011), and also occasionally taking place during private and other cultural events throughout the year, the carnival has the potential to generate lasting changes. Therefore, its effects continue to be experienced by the societies that participate in it. Furthermore, through its public nature, the changes initiated in the carnival can transcend beyond its temporal, spatial, and thematic boundaries. In fact, the carnival has already generated significant transformations by providing visibility to social groups that would otherwise not be accepted in the forefront of public life.

In summary, the Carnival de Ixtapan stands out as a dynamic universe where tradition, the breaking of norms, and the sense of community belonging merge. Through its colourful celebrations and challenges to established norms, this event not only offers a space for fun and expression but also drives social and cultural changes. Beyond its temporal and geographical boundaries, the carnival leaves a lasting imprint on the collective consciousness, challenging power structures and providing visibility and opportunities for inclusion to those who have historically been marginalised. Ultimately, the Carnaval de Ixtapan not only celebrates diversity but also stands as a symbol of resistance and transformation in the pursuit of a more inclusive and equitable society.

Conclusion

The Carnival de Ixtapan, in common with many other carnivals in Mexico and throughout Latin America, represents an important social and cultural event for the local community. An annual festivity, it provides a time and space for fun and relaxation where the normal rules of social interaction are temporarily suspended, and social hierarchies inverted. Those who are often excluded from social visibility in everyday Mexican life - such as members of the LGBTQ+ community and young women - are granted central roles and thus brought in from the margins. Even those who do not generally suffer from social marginalisation in day-to-day life - such as cisgender heterosexual men - are granted authorisation to transgress social expectations and thus may explore more feminised behaviours and forms of self-expression. This makes the carnival a potentially radical social occasion and poses a challenge to patriarchal and heteronormative social structures that continue to shape Mexican society.

This challenge is limited by both the temporary nature of the carnival and the ways in which potentially transgressive behaviours can become opportunities for reinforcing

traditional power structures. Carnival is an organised, temporally and spatially limited event, and the extent to which any challenge to social hierarchies and relationships persist beyond the limits of the carnival require further study. Heterosexual men may embrace aspects of feminine gender identities for three days of dancing and celebration, but after those days they likely return to their normal cis-heteronormative gender performances and social relationships within a national culture which is still very much shaped by traditional patriarchal norms (Alberti Manzanares and Nava-Ramírez, 2020; Martínez Gómez, 2022). The LGBTQ+ community may be included in the carnival space, and even celebrated through the role of the LGBTQ+ queen, but beyond the limits of the carnival period they often continue to experience marginalisation and sometimes even institutional and interpersonal violence within Mexican society (Monterrubio and Caselin, 2023; Zamorano Martínez and Rocha Sánchez, 2022). Carnivals are clearly not a panacea for all Mexico's issues of inequality and discrimination and on their own cannot lead to wide-ranging social transformation.

However, this does not mean that the challenges that Carnaval de Ixtapan presents to normative power structures and social relationships are not important. Social norms are deeply entrenched, and challenge is often slow and incremental, rather than radical and revolutionary, but this is still change (Westbrook and Schilt, 2014). This carnival illustrates that different forms of social arrangements, interactions and relationships are possible and this is an important step towards modification and even transformation. The cultural prominence of the carnival positions it as an important social occasion and thus these moments of transgression provide powerful symbolic evidence that alternative, more inclusive social practices are possible (Bakhtin, 2009).

Our ethnographic study makes important contributions to festival and events studies by providing a rich description of some of the ways in which specific carnivals can contribute to the inclusion of marginalised groups, and the dynamics of inclusion and exclusion within these spaces. As important social and cultural occasions, some carnivals throughout Latin America provide opportunities for marginalised communities to claim visibility in public life and space. This begins to challenge social hierarchies, albeit temporarily, and marks an important step towards social transformation.

The findings of this study are relevant for social intervention in Mexico. It is crucial to facilitate dialogue among carnival organisers, authorities, local communities, and representatives of marginalised groups to co-create more inclusive carnival experiences.

This can be achieved through workshops and consultations that ensure the incorporation of diverse voices and interests in the planning and organisation of certain carnivals. This should involve organising regular workshops aimed at identifying barriers to inclusion and collaboratively developing strategies for more diverse carnival programming. The insights gained from these sessions can then be utilised to create targeted actions and plans that address specific gaps.

Additionally, developing educational programmes within the context of such carnivals to raise awareness about social issues, promote inclusivity, and challenge stereotypes and prejudices is possible. Actionable recommendations could include developing educational programmes for local schools and community organisations that address social issues relevant to the carnival context. These programmes should feature sessions on inclusivity and anti-discrimination to foster awareness and understanding within the community. These programmes could be integrated into carnival events to reach a broader audience.

For academia, this study suggests future lines of research. Conducting longitudinal studies to monitor the persistence and impact of social changes induced by carnivals beyond the event itself is necessary. This would help with understanding of the extent to which temporary shifts in social hierarchies during this type of carnival translate into lasting changes in society. Furthermore, comparative studies of different carnivals within Mexico and across Latin America to identify variations in their impact on social norms and the inclusion of marginalised groups are pertinent. These studies could reveal regional differences and factors influencing these dynamics. Finally, a deeper intersectional analysis is needed to explore how various identities (such as race, gender, sexuality) intersect to shape experiences within carnivals and understand how these intersections affect both participation and exclusion.

By addressing these practical recommendations and future research directions, a deeper understanding can be gained of how carnivals in Mexico and beyond can act as catalysts for social transformation. This would provide key insights into the complexity of inclusion, exclusion, and power dynamics within cultural events.

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