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A mentőállomások településen belüli elhelyezkedésének jellemzői Magyarországon az Országos Mentőszolgálat megalakulása után

Spatial Distribution of Ambulance Stations within Settlements in Hungary after the Establishment of the National Ambulance Service

ABSZTRAKT

A tanulmány a magyarországi mentőállomások területi jellemzőit vizsgálja. Az 1948 utáni időszakban a mentőállomások elhelyezkedése főként az 1950–1960-as években változott, főleg a 10 000 főnél nagyobb településeken. Kezdetben – elsősorban történelmi okokból – a tűzoltóállomások befolyásolták az elhelyezkedést, később az egészségügyi központok vonzása vált meghatározóvá. A mentőállomások jelenlegi elhelyezkedésére jellemző, hogy a település központjától való relatív távolság a kisebb lakosságszámú, kisebb belterületű, illetve magasabb tengerszint feletti fekvésű településeken a legnagyobb. Emellett a kórházak vonzereje erősebben érvényesül kisebb településeken, és a mentőállomások gyakran a főútvonalak közelében helyezkednek el, ami szintén a kisebb településekre jellemző.

Kulcsszavak: mentőállomások, egészségügyi ellátási szintek, települések jellegzetességei

ABSTRACT

The study examines the spatial characteristics of ambulance stations in Hungary. After 1948, the location of these stations changed mainly during the 1950s and 1960s, particularly in settlements with a population of over 10,000. Initially, due to historical reasons, fire stations influenced their placement, while later, the attraction of healthcare centers became the dominant factor. A key feature of the current distribution of ambulance stations is that their relative distance from the town center is greatest in settlements with smaller populations, smaller built-up areas, and higher elevations. Additionally, the influence of hospitals is more pronounced in smaller settlements, and ambulance stations are often located near main roads, which is also characteristic of smaller towns.

Keywords: ambulance stations, health care levels, characteristics of settlements

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BEVEZETÉS

A különböző szolgáltatásokat biztosító intézmények/létesítmények településeken belüli elhelyezkedésének a vizsgálata a településföldrajz igen népszerű kutatási területének tekinthető. Az elemzések közös sajátossága, hogy alapvetően különbséget tettek a különböző szintű szolgáltatást biztosító létesítmények között, hangsúlyozva, hogy az alapfokú ellátás (pl. körzeti orvosi rendelő, élelmiszerbolt, könyvtár) esetében kiemelkedő fontosságú a lakossághoz való közelség (El-Meouch et al., 2022). Az oktatás esetében az alap- és középfokú ellátás térbeliségét elemző tanulmányok (pl. Kozma et al., 2014) egyrészt rámutattak az egyes történelmi periódusok közötti eltérésekre (pl. II. világháború utáni jelentős decentralizáció az általános iskolák, valamint a szakképzést szolgáló intézmények esetében) és a különböző fenntartók közötti különbségekre (pl. az egyházi iskoláknál törekvés a templomok közelségére). Másrészt felhívták a figyelmet arra, hogy a társadalmi változások (pl. a népességszám növekedése egyes városrészekben) jelentős kihívásokat jelentenek az oktatás számára (pl. ellátatlan területek léte), amelyek a központi és helyi kormányzat beavatkozását igénylik (Jiang et al., 2022; Mahdi & Al-Rawe, 2023; Muity et al., 2022).

A felsőoktatási intézmények esetében mind a hazai, mind pedig a nemzetközi szakirodalom alapvetően három típust különít el (Csapó et al., 2023; Den Heijer, 2008; Popov & Syrova, 2021): a városon kívüli (egyes esetekben ahhoz szorosan kapcsolódó) elhelyezkedés elsősorban akkor figyelhető meg, ha az intézmény létrehozása az utóbbi évtizedekben történt (pl. Miskolc, Kaposvár, a hollandiai Groningen), vagy/és biztonsági okok (pl. a természettudományi/orvosi képzéshez kapcsolódó nagyobb laboratóriumok) miatt célszerű a lakott területektől távoli elhelyezés. A második típus esetében a városon belül működik egy önálló egyetemi campus (Nyíregyháza, Győr), amely mögött az is állhat, hogy az eredetileg település széli elhelyezkedés a város növekedése következtében módosult. A harmadik esetben az intézmények, gyakran karonként szétszóródva, a város belső területén helyezkednek el (ez elsősorban a bölcsészeti- és társadalomtudományi karokra jellemző), és épülnek be a város szövetébe (pl. Budapest, Szeged, Cambridge).

A kulturális intézmények településeken belüli elhelyezkedésében a kutatások (pl. Macintyre et al., 2008; Huan, 2018; Ghasemi et al., 2019; Działek, 2021) jelentős különbségeket állapítottak meg: a könyvtárak és mozik esetében egy többé-kevésbé egyenletes fekvést lehetett megfigyelni, míg a múzeumok és művészeti galériák elhelyezkedése bizonyos szintű térbeli koncentrációt mutatott. Ez utóbbiak esetében meghatározó tényezőnek számított a lakosság jövedelmi helyzete (ez főleg azon településeken volt megfigyelhető, amelyek elég nagyok voltak ahhoz, hogy a helyi lakosság is jelentős fogyasztópiacot jelentett), illetve az egyes városrészek történelmi jellege (elsősorban azon településeken, amelyek életében fontos szerepet játszik a turizmus). A koncentrálódás folyamata ugyanakkor több esetben is olyan kulturális negyedek kialakuláshoz vezetett, amelyek fontos szerepet töltenek be az érintett települések életében és gazdasági fejlődésében (pl. Suárez & Mayor, 2017; Chapain & Sagot-Duvaurox, 2020).

A kereskedelem területén a kutatók a legnagyobb figyelmet a bevásárlóközpontok településeken (alapvetően városokon) belüli elhelyezkedésének a vizsgálatára fordítottak. A rendkívül sok típussal

(pl. Guy, 1998; Rao, 2020) rendelkező bevásárlóközpontok igen hosszú múltra tekinthetnek vissza (Sikos & Hoffmann, 2004), modern változatuk ugyanakkor először az Amerikai Egyesült Államokban, a lakossági szuburbanizációt követve az elővárosokban, az autópálya-csomópontokban jöttek létre (Guy, 1994). Ez a folyamat, bár kisebb intenzitással, volt megfigyelhető hosszú ideig Európában is (pl. Burtenshaw et al., 2021; Guimarães, 2019), és az első magyarországi fejlesztéseket is ez jellemezte (Csapó, 2004). Napjainkban azonban már megjelent az a tendencia is, hogy az érintett létesítmények (és ez elsősorban a bevásárlóközpontok ún. mall-típusára jellemző – pl. plázák) a városok belső részein kerülnek felépítésre (pl. Lowe, 2005; Kovács & Sikos, 2018), és fontos szerepet töltenek be a leromlott városrészek (korábban gyakran ipari célra hasznosított ingatlanok) revitalizációjában.

Az egészségügyi ellátás három szintje (Ember et al., 2013) közül az első szinten a körzeti orvosi ellátás helyezkedik el. Ennek elsődleges feladata a lakosság általános, kisebb problémákat jelentő egészségügyi problémáinak a kezelése, és ennek következtében a rendelők döntő mértékben egyenletesen oszlanak el a településeken belül (Xu et al., 2022; Kruger et al., 2013). A kutatások ugyanakkor arra is rávilágítottak, hogy egyes esetekben már itt is megfigyelhető a térbeli koncentráció: például a szintén az alapellátást szolgáló fogorvosi rendelők a városközpontban tömörültek (Kruger et al., 2013), illetve a németországi vizsgálatok (Bauer et al., 2016) a társadalmi-gazdasági helyzet befolyásoló hatását emelték ki.

A második szintet jelentő járóbeteg-szakellátás esetében két tendencia figyelhető meg. Egyrészt a kisebb, kórházzal nem rendelkező településeken, igazodva a jó elérhetőség igényéhez, a leggyakrabban a központi elhelyezkedés jellemző. Másrészt azokban a főleg közepes városokban, ahol kórház is működik, a járóbeteg-szakellátást több esetben is azon intézmények mellett, egy szervezeti egységet alkotva alakították ki.

Az egészségügyi ellátás harmadik szintjét jelentő kórházak esetében a tanulmányok elsősorban azon tényezők feltárására koncentráltak, amelyek befolyásolják ezen intézmények helyválasztását. Ennek keretében a kutatások rámutattak az egyes városrészek társadalmi-gazdasági helyzetének fontosságára (Chavehpour et al., 2019), a már működő létesítmények elhelyezkedésére (Sharmin & Neema, 2013), valamint a fontos útvonalak távolságának a hatására (Rahimi et al., 2017). Emellett arra is felhívták a figyelmet, hogy különbség figyelhető meg a különböző szintű ellátást biztosító kórházak településen belüli fekvésében is (Cheng et al., 2020).

A sürgősségi ellátást biztosító intézmények (mentő-, illetve tűzoltóállomások) elhelyezkedésével foglalkozó tanulmányok legfontosabb megállapításait összefoglaló cikkek (pl. Bélanger, 2019; Wang, 2021) több fontos következtetést is levontak. Egyrészt rámutattak arra, hogy a legjobb fekvést kereső vizsgálatoknak három típusát lehet megkülönböztetni (egzakt módszerek, heurisztikus/közelítő algoritmusok és szimuláció), másrészt felhívták a figyelmet arra, hogy az évek során a helymeghatározási modellek fejlődtek annak érdekében, hogy pontosabban reprezentálják a vizsgált kontextust, és a különböző bizonytalansági forrásokat.

A fentiek szellemében tanulmányunk célja az egészségügyi ellátásban igen fontos szerepet játszó mentőállomások településen belüli elhelyezkedése jellegzetességeinek a feltárása az Országos Men-

tőszolgálat megalapítása és 2023 között. Az elemzés szerves folytatását jelenti a szerzők korábban elvégzett kutatásának (Ecsegi et al., 2023), amelyben a mentőállomások Magyarországon belüli térbeli fejlődését mutatták be, rávilágítva az egyes időszakokban eltérő fontosságot betöltő szempontokra (1950-es évtizedben – gazdaságfejlesztés, 1960/1970-es évtizedben – közigazgatás, 1980-as évtizedtől – városi jogállás). A vizsgálat kiemelt fontosságát és egyediségét az jelenti, hogy szemben a korábban említett szolgáltatásokkal, ezen létesítmények lakosság által történő könnyű és olcsó megközelíthetősége csak minimális szerepet töltött be telephelyük kiválasztásában. Ennek szellemében elsősorban az alábbi kérdésekre keressük a választ:

- Mely településekre volt elsősorban jellemző a mentőállomások településen belüli elhelyezkedésének a változása, és ennek a folyamatnak milyen időbeli és térbeli jellegzetességei voltak.
- Milyen természet- és társadalomföldrajzi tényezők befolyásolják napjainkban a mentőállomások településen belüli elhelyezkedését, és ezek milyen kapcsolatban állnak a települések jellegzetességeivel.

MÓDSZEREK

A vizsgálat során a legfontosabb forrást az Országos Mentőszolgálat által biztosított adatbázis jelentette, amely a korábbi évekre vonatkoztatva utcánévvel és házszámmal, míg napjaink (2023) esetében GPS-koordinátákkal tartalmazta az egyes mentőállomások pontos helyét (a Budapesten található mentőállomásokat nem vontuk be a vizsgálatba). Azon mentőállomások esetében, amelyeket nem tartalmazott az OMSZ adatbázisa, a pontos cím megállapítása során az Arcanum Digitális Tudománytárban található korabeli újságcikkekre támaszkodtunk, valamint felhasználtuk az 1960-as években megjelent két címtárat is (Pálos, 1961; Pálos et al., 1968).

Az egyes települések központját a polgármesteri hivatal (korábban a szocializmus időszakában tanácsháza) földrajzi helye jelentette, míg a kórházak esetében az intézménybe behajtást biztosító kaput tekintettük a kiindulási pontnak (a több telephellyel működő kórházzal rendelkező települések – pl. Miskolc, Szeged, Pécs – nem kerültek bele az elemzésbe). A települések lakosságszámára és belterületének nagyságára vonatkozó adatokat a Központi Statisztikai Hivatal Tájékoztatási adatbázisa szolgáltatta. A települések tengerszint feletti magasságának a meghatározása során három internetes adatbázisra támaszkodtunk (<https://hu.db-city.com>, <https://meteoprog.com>, <https://floodmap.net/Elevation>), és az ott feltüntetett értékek számtani közepével számoltunk. Az elemzések során a mentőállomás és a település központja közötti relatív távolság meghatározása az alábbi módszerrel történt:

- a maps.google.hu térkép segítségével kiszámoltuk a település középpontja és a mentőállomás közötti távolságot;
- kiszámoltuk, mekkora lenne egy olyan területű kör sugara, amilyen nagy az érintett település belterületének a nagysága;
- az előző két pontban kapott számot elosztottuk egymással, és százalékos értéket számoltunk.

EREDMÉNYEK

A mentőállomások településeken belüli fekvésének a változása

A mentőállomások településen belüli helyváltoztatásának időbeliségét vizsgálva (1. táblázat) az egyes évtizedek között igen jelentős különbségek figyelhetők meg, és az időben előrehaladva egyre inkább nőtt az alapításkori helyen maradt objektumok száma. Ennek hátterében alapvetően az a tény áll, hogy a kezdeti évtizedekben (és ez különösen igaz az 1960 előtti periódusra) igen csekély figyelmet fordítottak a tudatos tervezésre, amely több tényezővel is magyarázható. Egyrészt az alapításkor gyakran csak az aktuális lehetőségeket/adottságokat tudták figyelembe venni (pl. hol volt a helyi tanácsnak olyan ingatlanja/épülete, melyet fel tudtak ajánlani erre a célra), és nem gondoltak/gondolhattak arra, hogy ez a későbbi bővítés (pl. gépjárműszám-növekedés) feltételeinek is megfeleljen. Másrészt az 1948 előtti „társbérlet” (erről a későbbiekben lesz szó) az 1950-es évektől egyre kevésbé volt fenntartható. Az 1960-as évektől kezdve ugyanakkor egyre nagyobb figyelmet fordítottak arra, hogy minden igényt kielégítő telephelyet találjanak.

1. táblázat: A mentőállomások településen belüli helyváltoztatásának időbelisége

Table 1. Timeliness of moving ambulance stations within a settlement

A mentőállomás létrehozásának időpontja	Az új helyre került állomások aránya (%)	Az új helyre került állomások végső helyre kerülésének időpontja (%)						
		A	B	C	D	E	F	G
1949 előtt	85,1	8,9	11,1	33,3	22,2	8,9	8,9	6,7
1949–1960	67,4	6,1	6,1	36,4	27,3	9,1	9,1	6,1
1961–1970	46,7	0,0	0,0	14,3	0,0	14,3	57,1	14,3
1971–1990	20,0	*	*	*	*	*	*	*
1991–2000	17,2	*	*	*	*	*	*	*
2000 után	0,0	*	*	*	*	*	*	*

A – 1950-es évek, B – 1960-as évek, C – 1970-es évek, D – 1980-as évek, E – 1990-es évek, F – 2000-es évtized, G – 2010 után. *Az 1971 utáni időszak az alacsony esetszám miatt nem számolható.

A jelenlegi/végleges helyre kerülés időpontját tekintve szintén megfigyelhetők bizonyos törvényszerűségek. Egyrészt a legnagyobb arányban az 1970-es évtized van jelen, amely véleményem szerint azzal indokolható, hogy az ebben az időszakban Magyarországon megfigyelhető gazdasági fejlődés megfelelő pénzügyi alapokat teremtett az új beruházásokhoz. Másrészt az 1948 előtt, illetve 1949 és 1960 közötti időszakban létrehozott mentőállomások közötti különbség (az utóbbiak későbbi végleges helyre kerülése) arra is utalhat, hogy az 1950-es évtizedben már volt bizonyos tudatosság, és az ekkor létesített állomások esetében később merült fel az új helyre telepítés szükségessége.

A helyváltoztatással érintett települések körét vizsgálva (2. táblázat) megállapítható, hogy 10.000 fő alatti települések esetében a mentőállomások igen jelentős/átlagon felüli része maradt meg az eredeti telephelyen, míg a 10.000 fő feletti települések jelentős részénél megfigyelhető volt a telephely-változás. A jelenség mögött véleményünk szerint az a tény áll, hogy mint korábbi tanulmányunkban

(Ecsegi et al., 2023) megállapítottuk, az időben előrehaladva egy kisebb lélekszámú településeken létesültek új mentőállomások, és az 1. táblázat adatai alapján az 1970 után átadott objektumok igen jelentős része már az eredeti helyen maradt.

2. táblázat: A mentőállomások településen belüli helyváltztatása településnagyság függvényében (%)

Table 2. Relocation of ambulance stations within a settlement as a function of settlement size (%)

Település nagysága	A mentőállomás az eredeti helyén maradt	A mentőállomásnak megváltozott a telephelye
5 001 fő alatt	83,1	16,9
5 001–10 000 fő	65,1	34,9
10 001–20 000 fő	37,0	63,0
20 001–50 000 fő	20,5	79,5
50 000 fő felett	37,5	62,5
Összesen	55,0	45,0

A mentőállomások helyszínének kiválasztását az elmúlt időszakban alapvetően két tényező befolyásolta: a tűzoltólaktanyák és a különböző egészségügyi intézmények elhelyezkedése, amelyek közül az előbbi az 1948-as állapotokra volt hatással, míg az utóbbi befolyását (igaz változó mértékben) az egész időszakon keresztül lehetett érzékelni.

Az 1948-as helyzetet vizsgálva (3. táblázat) kiemelhető a mentőállomások és a tűzoltólaktanyák igen szoros kapcsolata, amelynek háttérében részben a két világháború között megszületett 30.000/1925. B. M. számú tűzrendészeti kormányrendelet állt. Ennek értelmében azokban a városokban, ahol korábban nem működött önkéntes mentőegyesület, és annak megszervezése valamilyen akadályba ütközött, a mentőszolgálatot a hivatásos tűzoltóság szervezetén belül kellett létrehozni (Berki, 2020), és így gyakran a telephelyük is közös volt. A helyzet tarthatatlanságát ugyanakkor jól jelzi, hogy az érintett mentőállomásoknak közel 50%-a már az 1950-es években új helyre költözött.

3. táblázat: A mentőállomások elhelyezkedésének jellegzetességei 1948-ban (%)

Table 3. Characteristics of the location of ambulance stations in 1948

Tűzoltólaktanyában	Egészségügyi intézményben	Községházán	Egyéb helyen
43,3	31,3	14,9	10,4

Forrás/ Source: Kopasz, 1948

A mentőállomások telephelyét vizsgálva a másik, lényegében mindmáig fontos tényezőt jelentett az egészségügyi intézmények elhelyezkedése. Ebben az esetben ugyanakkor bizonyos időbeli változásokat is meg lehet figyelni. Ez az Országos Mentőszolgálat megalakulása előtt alapvetően a kórházakat jelentette, és ennek szellemében nem meglepő, hogy 1948-ban a mentőállomások közel 1/3-a ezekben működött.

Az 1950-es és 1960-as években új befolyásoló tényezőként jelentek meg a szülőotthonok. Ezen egészségügyi intézmények a II. világháború után terjedtek el nagyobb számban (számuk ezekben az évtizedekben, szemben a két világháború közötti 20-30 darabbal, kb. 100 körül mozgott, és csak az 1970-es évek közepén csökkent 50 darab alá), és fontos szerepet játszottak a csecsemőhalandóság

csökkentésében. Emellett a körzeti/háziorvosi szint és fekvőbeteg szakellátás közötti középső szint első kezdeményezését jelentették, és ennek szellemében nem meglepő, hogy a mentőállomásokat a közelükbe telepítve igyekeztek egy helyi egészségügyi központot kialakítani (az említett 20 évben, ha olyan településen jött létre mentőállomás, ahol már volt szülőotthon, akkor az állomások 57%-a azok közelébe települt).

A 1970-es évek közepétől újabb jelentős változást lehetett megfigyelni a hazai egészségügyi ellátásban: az addig elsősorban a nagyobb városokban, igen gyakran a kórházak mellett működő járóbeteg-szakellátás fokozatosan megjelent a kisebb lakosságszámú településeken is. A rendelőintézetek igen fontos szerepet töltöttek be a környező települések egészségügyi ellátásában, és ennek szellemében nem meglepő, hogy – amennyiben lehetőség kínálkozott rá – a településekre „érkező” mentőállomások is ezek szomszédságába települtek (az 1990-es és 2000-es évtizedben, ha olyan településen jött létre mentőállomás, ahol már volt rendelőintézet, akkor az állomások 65%-a azok közelében jött létre).

A telephelyváltozások következtében jelentős mértékben megváltozott a mentőállomások településen belüli helyzete, amely a legnyilvánvalóbb jelének a központtól való távolság növekedése tekinthető (4. táblázat). 1948-ban a mentőállomások több mint a fele a településközponttól kevesebb, mint fél kilométerre helyezkedett el, és alig haladta meg a 10%-ot az attól 1 km-nél távolabb fekvő mentőállomások aránya. Ezzel szemben napjainkban az előző mutató 50% alá csökkent, míg az érintett objektumok csaknem $\frac{1}{4}$ -e a településközponttól több mint 1 km-re helyezkedik el.

A változás hátterében véleményünk szerint több tényező állt. Egyrészt a településközpontokhoz közel elhelyezkedő ingatlanokon csak korlátozottan nyílt lehetőség arra, hogy kielégítsék a mentőállomásokkal szemben jelentkező elvárásokat (pl. az újabb mentőautók szolgálatba állítása következtében megnövekedett garázs-igény). Másrészt a településközpontokhoz közel fekvő ingatlanok esetében a helyi vezetők részéről jogosan merült fel a más célra történő felhasználás igénye, és amikor az előző pontban említett tényező miatt felvetődött a helyváltoztatás szükségessége, akkor térben távolabbi lehetőségeket kerestek.

4. táblázat: A mentőállomások településközponttól való távolságának a változása
(%, a táblázatban csak azon mentőállomások szerepelnek, amelyeknek megváltozott a telephelye)

Table 4. Change in the distance of ambulance stations from the centre of the settlement
(%, only ambulance stations whose location has changed are included in the table)

Távolság	1948-as fekvés	Jelenlegi fekvés
0,26 km alatt	35,2	11,0
0,26–0,50 km	20,9	33,0
0,51–0,75 km	25,3	14,3
0,76–1,00 km	7,7	18,7
1,01–1,25 km	5,5	7,7
1,26–1,50 km	2,2	5,5
1,50 km felett	3,3	9,9

A mentőállomások településen belüli elhelyezkedésének változását Debrecen példáján lehet igen szemléletesen bemutatni. A városban – hasonlóan az ország több településéhez – az első mentőegységek a tűzoltóságon belül jöttek létre (az alapítás 1906-ban történt), és így a mentőállomás is a tűzoltólak-tanyában, a városközpont-hoz igen közel működött (1. ábra). A második világháború után a mentési feladatok növekedésével a társbérlet egyre kevésbé volt fenntartható, és már 1950-ben létrejött – még ekkor is a városközpont-hoz közeli, forgalmas út mentén elhelyezkedő – új telephely. Az 1970-es évek elejére az ingatlan azonban egyre szűkebbnek bizonyult, és ennek következtében 1972-ben a belvárost övező nyugatról övező 4. számú főközlekedési út mentén felépült az új mentőállomás, amely az elmúlt időszakban számos felújításon ment keresztül. Az ingatlan kiválasztásában az is szerepet játszott, hogy a nagy lakótelepeket a város nyugati részén tervezték felépíteni, és ennek következtében azok megközelítése az új telephelyről igen könnyű volt (nem kellett átkelni a belvároson).

1. ábra: A debreceni mentőállomások helyének változása 1948 és 1972 között

Figure 1. Changes in the location of ambulance stations in Debrecen between 1948 and 1972



1 – telephely 1948 és 1950 között, 2 – telephely 1950 és 1972 között, 3 – telephely 1972 után.

1 – location between 1948 and 1950, 2 – location between 1950 and 1972, 3 – location after 1972.

A mentőállomások településen belüli helyzete napjainkban

A mentőállomások településeken belüli napjainkbeli földrajzi helyzetének vizsgálata során alapvetően három tényezőre fordítottunk nagyobb figyelmet: a településközponttól való relatív távolság, a helyi kórháztól való távolság, illetve a település legfontosabb útjaihoz viszonyított helyzet. A településközpont-hoz való relatív távolság esetében (a módszer kiszámításának módját a Felhasznált adatbázis és



módszerek fejezetben ismertettük) három tényező hatását feltételeztük és elemeztük: a települések lakosság száma, nagysága, valamint a tengerszint feletti magassága.

Az első két tényező esetében megfigyelhető (5. és 6. táblázat), hogy mind a számtani átlag, mind pedig a medián vonatkozásában (felmerülhet a kérdés, melyik mutató fejezi ki jobban a valóságos helyzetet) a legmagasabb értékek az alacsonyabb lakosság számú, illetve a kisebb nagyságú települések esetében tapasztalhatók (ez az „együtt-állás” nem tekinthető meglepőnek, mivel az alacsony lakosság számú települések a legtöbb esetben kicsi belterülettel rendelkeznek). A jelenség hátterében véleményünk szerint az áll, hogy az itteni mentőállomások a környező települések egészségügyi ellátásában is rendkívül fontos szerepet töltenek be (sőt az tekinthető elsődleges feladatuknak), és ennek következtében nem annyira meghatározó a település központjához közeli elhelyezkedés szükségessége. A nagyobb lakosság számú és nagyobb belterülettel rendelkező települések esetében ilyen jellegű összefüggés (vagyis a településközponttal való közelséget jelentő alacsonyabb relatív távolság) csak korlátozottan (elsősorban a számtani átlag esetében) figyelhető meg.

5. táblázat: A mentőállomások településközponttól való relatív távolsága (%) a települések lakosság számának függvényében 2023-ban

Table 5. Relative distance of ambulance stations from the centre of a settlement (%) as a function of the population of the settlement in 2023

A települések lakosság száma	Számtani átlag	Medián
2 000 fő alatt	52,4	42,9
2 000–5 000 fő	42,0	38,0
5 000–7 500 fő	46,2	28,9
7 500–10 000 fő	38,9	33,2
10 000–20 000 fő	43,6	36,6
20 000–50 000 fő	35,9	28,3
50 000 fő felett	33,5	36,0

Forrás: Országos Mentőszolgálat adatbázisa, Központi Statisztikai Hivatal Tájékoztatási adatbázisa, maps.google.hu
Source: National Ambulance Service database, Central Statistical Office - Information database, maps.google.hu

6. táblázat: A mentőállomások településközponttól való relatív távolsága (%) a települések nagyságának függvényében 2023-ban

Table 6. Relative distance of ambulance stations from the centre of a settlement (%) as a function of the size of the settlement in 2023

A települések nagysága (km ²)	Számtani átlag	Medián
Kevesebb, mint 2 km ²	49,9	41,8
2–5 km ²	47,6	38,4
5–10 km ²	36,9	27,2
10–20 km ²	43,2	36,9
20 km ² -nél nagyobb	30,4	32,5

Forrás: Országos Mentőszolgálat adatbázisa, Központi Statisztikai Hivatal Tájékoztatási adatbázisa, maps.google.hu
Source: National Ambulance Service database, Central Statistical Office - Information database, maps.google.hu

A harmadik meghatározó tényezőnek feltételezett tengerszint feletti magasság esetében egyértelmű tendencia csak a két „szélsőség”, a legalacsonyabban, illetve a legmagasabban fekvő települések esetében állapítható meg (7. táblázat): az előbbieken a legkisebb, míg az utóbbiak esetében a legmagasabb a számtani átlag, illetve a medián értéke.

Ez a tény véleményünk szerint azzal indokolható, hogy a legalacsonyabban fekvő és a legtöbb esetben kicsi szintkülönbséggel jellemezhető településeken könnyebb volt a település központjához relatíve közelebb elhelyezkedő ingatlanokat találni a mentőállomások kialakításának a céljára. Ezzel szemben a legmagasabb tengerszint feletti magasságkategóriába tartozó településeken már a szintkülönbségek is nagyobbak, a terület nem annyira egyenletes, és ennek következtében nehézségekbe ütközött a településközponti fekvés.

7. táblázat: A mentőállomások településközponttól való relatív távolsága (%) a települések tengerszint feletti magasságának a függvényében 2023-ban

Table 7. Relative distance (%) of ambulance stations from the centre of a settlement as a function of the altitude of the settlements in 2023

A települések tengerszint feletti magassága (m)	Számtani átlag	Medián
90 méter alatt	36,7	23,7
90–110 méter	43,8	34,5
110–130 méter	44,1	35,6
130–170 méter	40,0	33,2
170 méter felett	44,8	38,9

Forrás: Forrás: Országos Mentőszolgálat adatbázisa, <https://hu.db-city.com>, <https://meteoprog.com>, <https://floodmap.net/Elevation>, maps.google.hu

Source: National Ambulance Service database, Central Statistical Office - Information database, <https://hu.db-city.com>, <https://meteoprog.com>, <https://floodmap.net/Elevation>, maps.google.hu

Az egészségügyi ellátás legmagasabb szintjét jelentő kórházak/klinikák alapvetően olyan településeken működnek, ahol mentőállomás is található, az egyedüli kivételt a Pest megyei Kistarcsa jelenti. A két egészségügyi intézmény fekvésének egymáshoz való viszonyát tekintve (8. táblázat) bizonyos szintű vonzerő állapítható meg: a mentőállomások csaknem 1/3-a a kórházak mellett helyezkedik el, és a nem ilyen fekvésű objektumok kórháztól való átlagos távolsága is alig több mint 1 km. A jelenség hátterében véleményünk szerint az áll, hogy kórház melletti, illetve ahhoz közeli fekvés a kórházba történő betegszállítás esetében a mentőautóknak kisebb távolságot kell megtennie, és ez költségmegtakarítást tesz lehetővé, illetve egyéb szinergikus hatások is jelentkezhetnek.

A különböző nagyságú települések között ugyanakkor jelentős különbségek tapasztalhatók. Egyrészt a kisebb kiterjedésű települések esetében sokkal gyakrabban (az esetek közel 50%-ban) figyelhető meg, hogy a mentőállomás a kórház közvetlen szomszédságában helyezkedik el, míg a legnagyobb településeknél ez az arány mindössze 25%. Másrészt az előző kategóriába tartozó településeken a nem a kórház mellett fekvő mentőállomások kórháztól való távolsága a legalacsonyabb, míg az ellenkező végletet alkotó településeken a legmagasabb értékkel jellemezhető.

8. táblázat: A mentőállomások és az adott településen működő kórház elhelyezkedése közötti kapcsolat 2023-ban a lakosságszám függvényében

Table 8. The relationship between the location of ambulance stations and the location of the hospital in the settlement in 2023 as a function of the size of the settlement

A települések nagysága (km ²)	A mentőállomás a kórház mellett fekszik (%)	A kórház és nem a kórház mellett fekvő mentőállomás közötti távolság (km)	
		Medián	Számtani átlag
7,51 km ² -nél kevesebb	42,90	0,40	0,56
7,51–15,00 km ²	39,10	1,00	1,22
15,01–30,00 km ²	24,00	1,10	0,99
30,00 km ² -nél több	25,00	1,13	1,79
Átlag	32,90	1,00	1,08

Forrás: Országos Mentőszolgálat adatbázisa, Központi Statisztikai Hivatal Tájékoztatói adatbázisa, maps.google.hu
Source: National Ambulance Service database, Central Statistical Office - Information database, maps.google.hu

A mentőállomások hatékony működése szempontjából előnyösnek tekinthető, ha a település legfontosabb útja/útjai közelében helyezkednek el, mivel ez megkönnyíti az esethelyszínek gyors elérését (a legfontosabb út a vizsgálat során a településen átvezető utat, illetve az azt más településekkel összekötő, több esetben egy vagy kétszámjegyű főutat jelentette). Az általános helyzetet tekintve igen kedvező kép rajzolódik ki (9. táblázat): a mentőállomások közel fele az adott település legfontosabb útja(i) mellett helyezkedik el, és alig haladja meg a 20%-ot az attól/azoktól több mint 500 méterre fekvő mentőállomások aránya, az egyes települések között ugyanakkor igen jelentős különbségek figyelhetők meg.

9. táblázat: A mentőállomások és a települések legfontosabb útja(i) közötti távolság a települések nagysága függvényében 2023-ban (%)

Table 9. Distance between ambulance stations and the main road(s) in the settlements as a function of the size of the settlements in 2023 (%)

A települések nagysága (km ²)	A	B	C	D
Kevesebb, mint 2 km ²	57,9	36,8	5,3	0,0
2–5 km ²	59,7	26,4	11,1	2,8
5–10 km ²	42,3	39,7	15,4	2,6
10–20 km ²	34,7	32,7	24,5	8,2
20 km ² -nél nagyobb	17,4	39,1	34,8	8,7
Átlag	44,8	34,0	17,0	4,1

A – a mentőállomás az adott út/utak mellett (vagy attól maximum 100 méterre) fekszik, B – a távolság 100 méter és 500 méter között van, C – a távolság 500 méter és 1 km között van, D – a távolság több, mint 1 km. Forrás: Országos Mentőszolgálat adatbázisa, Központi Statisztikai Hivatal Tájékoztatói adatbázisa, maps.google.hu

A – the ambulance station is located next to the given road(s) (or within a maximum of 100 meters), B – the distance is between 100 meters and 500 meters, C – the distance is between 500 meters and 1 km, D – the distance is more than 1 km. Source: National Ambulance Service database, Central Statistical Office - Information database, maps.google.hu

A kisebb területű települések esetében dominál a legfontosabb út melletti, illetve ahhoz nagyon közeli fekvés, míg a nagyobb településeken egyre nagyobb arányban vannak jelen a legfontosabb úttól legalább 500 méterre elhelyezkedő mentőállomások. A jelenség mögött több tényező hatása is megfigyelhető. Egyrészt a kisebb településeken gyakran alig található több mint 1-2, a vizsgálat értelmezése szerint fontosabb út (gyakran csak ezek rendelkeznek megfelelő burkolattal), és a környék megfelelő szintű ellátása érdekében logikus döntés volt, hogy a mentőállomás ezek mellett helyezkedjen el (emellett az érintett mentőállomás a legtöbb esetben alig egy-két kocsival működik, és így csak kisebb méretű ingatlan volt szükséges a létrehozásához). Ezzel szemben a nagyobb települések esetében már nagyobb telekre volt szükség a mentőállomások kialakításához, és ez nem minden esetben állt rendelkezésre az érintett utak mentén.

KÖVETKEZTETÉSEK

A tanulmány legfontosabb megállapításai az alábbiakban foglalhatók össze. Az 1948 utáni időszakban a mentőállomások telephelyének megváltozása elsősorban az 1950-es és 1960-as évtizedekre volt jellemző, és főleg a 10 000 főnél nagyobb települések esetében lehetett ezt a folyamatot megfigyelni. A térbeli elhelyezkedést meghatározó tényezők közül a kezdeti években – elsősorban történelmi okok miatt – a tűzoltólaktanyák hatását lehet kiemelni, míg a későbbiekben az egészségügyi intézmények vonzó hatása érvényesült. Ez utóbbi tényben minden valószínűség szerint fontos szerepet játszott az Országos Közegészségügyi Tanács 790/1949-2597. O.K.T sz. javaslata, amely az új mentőállomások elhelyezkedését tekintve a települések döntő részénél a kórházak közelségének a fontosságát emelte ki (Debrődi, 2012).

A mentőállomások jelenlegi elhelyezkedését vizsgálva az egyik fontos megállapításnak tekinthető, hogy a településközponttól való relatív (a település belterületének nagyságához mért) távolság az alacsonyabb lakosságszámú, kisebb belterülettel rendelkező, illetve magasabban fekvő települések esetében a legnagyobb. Másrészt – az előző bekezdésben leírtak szellemében – jól kimutatható a kórházak vonzerejének a hatása, amely elsősorban a kisebb települések esetében jelenik meg hangsúlyosan. Harmadrészt az is megfigyelhető, hogy a mentőállomások igen közel helyezkednek el a települések legfontosabb útjaihoz, amely tény sokkal inkább jellemző a kisebb, mint a nagyobb településekre.

A kutatás továbbfejlesztése több irányban is megvalósítható. Egyrészt lehetőség kínálkozik az ellátandó terület nagysága és a településen belüli elhelyezkedés közötti kapcsolat vizsgálatára, másrészt elemezni lehet a mentőállomások megjelenését az egyes települések fejlesztési dokumentumaiban.

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Rogerson, Christian M.¹

Racialized Hospitality Spaces: Food and Drink in Apartheid Johannesburg

ABSTRACT

In parallel with trends in tourism scholarship historical research is beginning to gain slow recognition and acceptance in hospitality studies. Existing literature is dominated by studies in Europe and North America. The topic holds significance for both hospitality researchers and geographers as it concerns the racialization of hospitality spaces. This paper offers a glimpse into the history of the hospitality trades in urban South Africa. The article is novel in contributing an analysis of the racialised landscape of hospitality during the apartheid years through examining the experience of Johannesburg. The research focus is on the segregated formal and informal hospitality services which evolved for the provision of food and drink to Africans, the racial group most disadvantaged by apartheid legislation. It is demonstrated that during the 1950s and 1960s the formal and informal economies of food and drink created different spaces of hospitality in apartheid Johannesburg.

Keywords: apartheid, eating-houses, informal economy, municipal beer halls, racialized hospitality, shebeens

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INTRODUCTION

Among the most widely cited academic definitions of hospitality are those discussed by Conrad Lashley (2000, p. 3) that it concerns “the provision of food and/or drink and/or accommodation away from home” and “a contemporaneous exchange designed to enhance mutuality (wellbeing) for the parties involved through the provision of food and/or drink, and/or accommodation”. As Walton (2016) reminds us, the business of commercial hospitality has its roots in supplying to travellers through the market the basic human needs of food, drink, shelter and rest. Indeed, this core of services in commercial hospitality exhibits a long ancestry and has been embellished in different ways in various settings across the world (O’Gorman, 2009). Arguably, however, despite the growth in global importance of the hospitality industry, both in economic and employment terms, it remains the case that “little work has been undertaken to examine the emergence and historical development of the industry” (Nickson, 1997, p. 179). This knowledge gap was pinpointed over three decades ago in a study on the USA (Woods, 1991). It was made clear by Woods (1991, p. 90) that there exists a “dearth of historical literature about the hospitality industry”. Moreover, the little available material was seen as limited in scope and mainly centred on the biographies of prominent hoteliers – ‘great men’ – who shaped the industry. Underpinning this research neglect surrounding the history of the US commercial hospitality sector was that the central focus of hospitality programmes in the country remained that of the teaching of applicable on-the-job management skills. The continued dominance of hospitality research by a business management perspective is reinforced both by Lashley (2000) and Bell (2007).

Until recently, therefore, hospitality’s past, was not considered as a significant issue for research or teaching. Bell (2007) observes the history and making of hospitality spaces was an underdeveloped research domain. In common with trends in tourism scholarship historical studies are now beginning to gain slow recognition and acceptance in hospitality studies (Walton, 2005). One sign of change is the greater awareness of hospitality studies to the merits of pursuing historical research methodologies. This is reflected in recent publications by MacKenzie et al. (2020) and Olya et al. (2020). Over the period since Woods (1991) called for greater scholarly attention to uncover the historical dimensions of commercial hospitality, progress must be acknowledged in carving out a place for historical studies of hospitality. Examples include research which illuminates the rise of restaurants, the growth of eating-out, and of changing drinking spaces (Warde & Martens, 2000; Kiefer, 2002; Burnett, 2004; Scholliers, 2009; Haley, 2011; Mac Con Iomaire, 2011, 2013; Symons, 2013; Kiley, 2014; Mac Con Iomaire, 2014; Jennings, 2016; Spang, 2019; Kneale, 2021). The most notable work is Rebecca Spang’s (2019) magisterial account of the origins of the restaurant which is traced from its 1760s emergence in Paris. In another influential study Walton (2016) chronicles the social history of the hospitality trades in Britain and pinpoints both the enduring continuities as well as significant changes over the years. Important contributions on hospitality social spaces for drinking include the works by Beckingham (2012, 2017), Jennings (2016) and Kneale (1999, 2021).

It is evident that the rise in interest in hospitality trades of the past has been overwhelmingly focussed on case studies conducted in Europe or North America. Arguably, hospitality spaces in the



Global South warrant further investigation. One relevant African study is Craggs (2012) fascinating exploration of the politics of multi-racial hospitality spaces—including for food and drink—in Salisbury, Southern Rhodesia during the late colonial period. Against this backdrop this paper offers a small window onto the history of hospitality trades in urban South Africa. More specifically, the article is novel in contributing an analysis of the racialised landscape of hospitality during apartheid years, a facet of the ‘other half of urban tourism’ (Rogerson & Rogerson, 2021a). Johannesburg, South Africa’s commercial heart and largest city, is the geographical focus for this investigation. The core period under scrutiny is 1948–1970. The decade of the 1960s represents that which corresponds to the most rigorous application of measures for racial segregation. The research focus is on the formal and informal hospitality services which evolved for the provision of food and drink to Africans, the racial group most disadvantaged during the apartheid era (Musavengane, 2019). The organization of the paper is as follows. The next two sections offer in turn a brief literature review as context on the apartheid project and its key institutional components followed by a discussion on methods and sources. The major part of the paper is comprised of an analysis of the historical evolution of hospitality spaces for Africans in apartheid Johannesburg respectively for the provision of food and the consumption of alcohol.

LITERATURE REVIEW

According to the historical geographer, Christopher (1992, p. 561): “One of the major subjects of international controversy and condemnation in the twentieth century has been the imposition of a system of legalized segregation on a racial basis—urban apartheid—in South Africa”. Nevertheless, segregation and racial discrimination evidence a long history in South Africa and operated long before 1948, the start of the apartheid era (Higginbotham, 1994; Beinart & Dubow, 1995). From the establishment of the Union of South Africa in 1910 a succession of governments pursued a more or less definite policy of racial segregation (Cornell, 1960). As articulated recently by Fleishman (2023, p. 530) the “segregationist philosophy of the South African state since at least the 1920s, legislated through the pass laws, influx control and the Urban Areas and Group Areas Act, was that black Africans worked, but did not live, in cities”. In terms of this imaginary, the essential site of African social and community life was understood to be in rural areas. The viewpoint was that Africans “were imagined as fundamentally tribal, alien to city life and cut off from modernity. Their presence in the city, the claimed domain of the white man, was predicated on their provision of labour” (Fleishman, 2023, p. 530).

The apartheid project, argues Posel (2001, p. 57), “was underpinned by a hankering for *order* – an orderly society and an orderly state to tame the perceived dissolution and turbulence engendered during the 1940s”. According to Cavanagh (2016) apartheid was to be associated with a distinct platform of racial separation. Its foundation was essentially statutory and much of the legislation was designed to classify peoples and impose appropriate restrictions. Pellicer and Ranchhod (2023, p. 2) maintain that

apartheid was “based on a belief in scientific racism and White supremacy, and emphasized racial ‘separateness’ as its core principle”. Greenberg (1987, p. 1) is unequivocal that the apartheid state was “formally and fully associated with the needs and dominance of a privileged racial minority”. For its supporters apartheid “offered the promise of heightened discipline, regulation and surveillance; boundaries were to be reasserted and spaces reorganised, the movements of people systematized and contained, races rescued from ‘impurity’, the notion of family rehabilitated and ‘the savage discipline of tribal life’ restored” (Posel, 2001, p. 58). Under apartheid a series of laws were enacted to formally entrench racial separation and discrimination to encompass every dimension of political, economic and social life (Lemon, 2016; Maylam, 2017). Accordingly, whilst the history of racial discrimination in South Africa therefore dates to the earlier colonial periods—including of both Dutch and British rule—racial discrimination intensified following the 1948 elections which brought the National Party government to power. For Boehmer (2024, p. 103) apartheid was institutionalised in 1948 with the rise to power of the National Party which “elaborated and refined the system of social and economic segregation that had existed to varying degrees in South Africa since the mid-nineteenth century”.

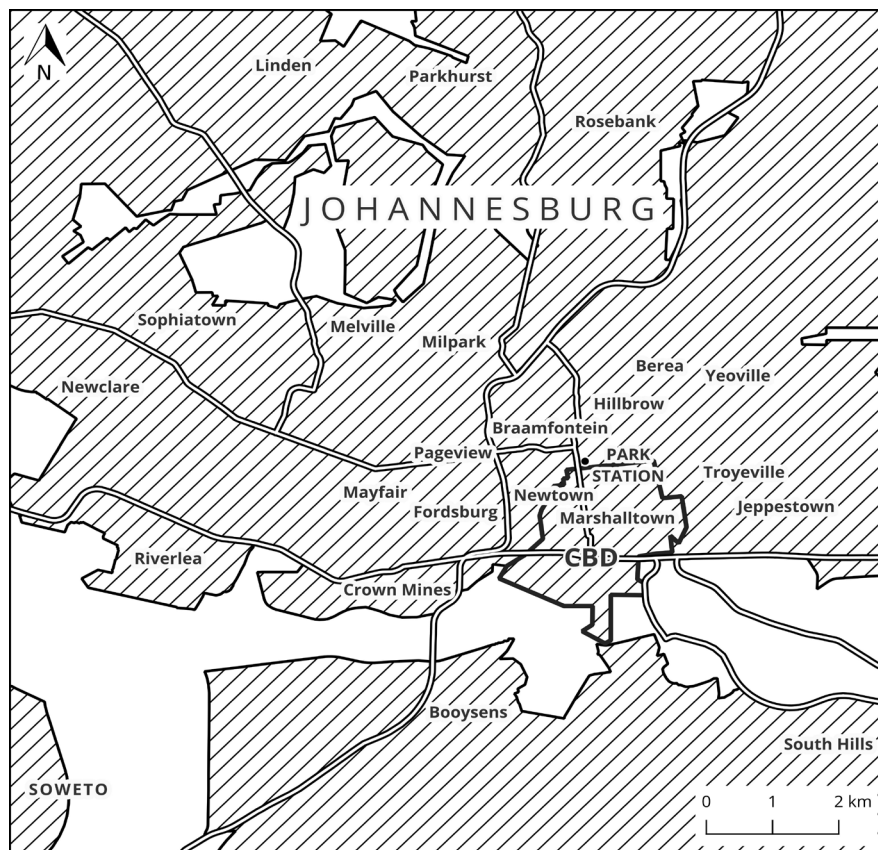
Healy-Clancy (2017) avers that from the outset apartheid was a gendered project. She states that the immediate goal of the white men who controlled the apartheid state was to control black men and turn them into compliant workers thereby to ensure South Africa’s development into an industrialized country in which whites would enjoy growing wealth and political hegemony. The anchor for this strategy was that African men would travel to work temporarily in the cities whilst retaining their homes in rural reserves or Homelands. This vision was dependent on the labours of African women who had to maintain their families in the increasingly overcrowded and desolate countryside and ensuring the cheap reproduction of a labour force. The spatial mobilities of Africans were controlled through the regime of influx control and the pass books/laws which had a contradictory aim in that they were designed to serve an exclusionary need to restrict Africans from the space of the ‘white city’ and an inclusionary need to ensure cheap labour within these spaces (Savage, 1984; Hindson, 1987; Rogerson & Rogerson, 2024a).

For Luiz (1998, p. 50) the apartheid state “engaged in a form of social engineering that was awesome in its scale and vision” by attempting to geographically segregate its citizens according to a racial classification. The National Party’s ascent to power set the context for a barrage of racial legislation that would follow most notably the Population Registration Act of 1950 which classified all South Africans into one of four race groupings (whites, Coloureds, Indians and Africans) as it “was particularly obsessed with the policy of racial segregation of the different groups in all spheres – social, economic, and political” (Maharaj, 2020, p. 42). The impact of racially discriminatory legislation on the tourism sector recently has been unpacked for the city of Cape Town and showed major consequences for accommodation services as well as visitor attractions including beach spaces (Rogerson & Rogerson, 2025). The sphere of hospitality in South Africa did not escape the influence of racial segregation both prior to 1948 and following the enactment of apartheid planning.

METHODS

With the aim to excavate the hospitality economy of Johannesburg this research adopted an historical geographical approach (Byron, 2024). Much strength is drawn from a suite of writings and research that appeared during the 1980s in the ‘new school’ of South African historical geography (Crush, 1992). This literature was influenced substantially by the South African social history movement which constituted a vibrant and dynamic understanding of many aspects of the South African past and contributed to a re-orientation of the directions pursued in historical geographical research in the country. The world of the common people and the researching of historical geographies ‘from below’ became the axis of this new historical geography that crystallized in South Africa (Crush, 1992). Use is made here of extant historical geography material and of archival sources. In particular, the research builds upon primary documentary material secured from the South African Institute of Race Relations collections of Historical Papers at the University of the Witwatersrand, Johannesburg as well as from the National Library depot in Cape Town. This material is further supplemented by newspaper reports from *The Bantu World*, a national newspaper published in Johannesburg from the early 1930s and which was targeted at the urban African elite (Switzer, 1988). Copies of this newspaper can be accessed through the digital collections of South Africa’s National Library. Figure 1 provides the spatial context for understanding the hospitality economy of Johannesburg.

Figure 1. The location of significant geographical places discussed in the study



RESULTS

The findings are presented in terms of two sub-sections of discussion. These deal with different facets of hospitality trades in Johannesburg. The first sub-section documents food and eating-out options for Africans in the city. The second turns to controversies and the provision of hospitality spaces for the consumption of alcohol.

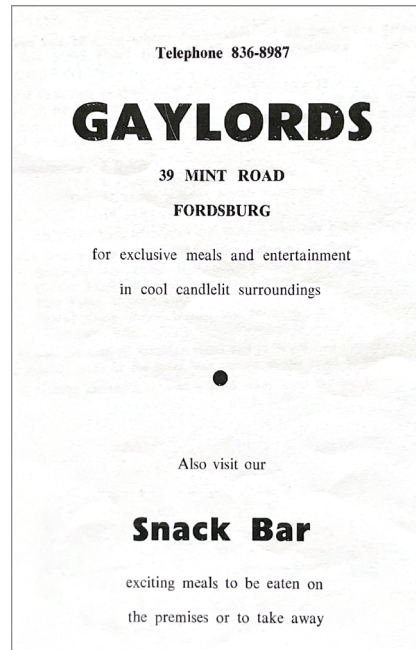
Food and eating-out in the city

The food daily needs of a growing African urban populace in South Africa underpinned the growth of hospitality businesses. Cobley (2021) records that in the space of four decades the urban African population of South Africa quadrupled from just over 500 000 in 1911 to 2.24 million by 1951 with the city of Johannesburg experiencing the greatest growth (Crankshaw, 2005). It was recorded that across urban South Africa “racial segregation and discrimination were widespread in eating facilities” (Higginbotham, 1994, p. 32). Such practices were condoned and facilitated by legislation such as the Eating House Act (26 of 1905). As the tempo of African settlement accelerated into the city from the 1920s racially-segregated food services and restaurants therefore evolved as the historical norm in Johannesburg (Rogerson, 2024).

Similar to the experience of African-Americans in the Jim Crow era, segregation opened a doorway for entrepreneurship and the rise of African-owned food services in urban areas (cf. Briscoe, 2024). Advertisements appearing in *The Bantu World* newspaper during the 1930s confirm the existence of a handful of African-owned restaurants in operation within the space of central Johannesburg and surrounds. One example was that of ‘The High Class Bantu Restaurant’ which opened on Von Weilligh Street where it was proclaimed “Purest Food, Civility and Cleanliness were guaranteed”. At what was described as the popular ‘Mabuza’s Restaurant and Butchery’ on Market Street it was advertised that “Satisfaction is our delight, cleanliness is our motto”. The ownership of restaurants by Africans in central spaces of Johannesburg was reduced, however, by the march of racial segregation and the progressive clearance of areas of African settlement which formerly were close to the inner-city (Rogerson, 2025). During the 1950s the brutal removal of the Western Areas and especially of Sophiatown, caused the termination of the businesses of several (African) owners of restaurants operating in these suburbs. Although the former African residents of these areas were dispersed most were relocated to the soulless and regimented townships of Soweto (Pirie & Hart, 1985). Further impacting the operations of the city’s racially segregated restaurants was enactment of restrictions in terms of the 1950 Group Areas Act and the 1953 Reservation of Separate Amenities legislation (Kirkby, 2022). Under the interpretations of the Group Areas Act in at least one case a conviction occurred of “a black man for eating in a designated white-only restaurant” (Higginbotham, 1994, p. 50). Under new provisions of the Native (Urban Areas) Act in 1955 African entrepreneurs were prohibited from occupying premises outside of official African township spaces and thus were excised

from the Johannesburg CBD. Refusals to ‘business and professional men’ included for restaurant operators even for those businesses situated close to municipal beer halls and bus terminals.

Figure 2. Restaurant advertisement for ‘non-Whites’ in Johannesburg



Source: Suttner, 1966: 11.

By the 1960s the potential options of commercial hospitality for eating out by African residents or visitors to apartheid Johannesburg were sparse (South African Institute of Race Relations, 1968). In the mainly Indian working-class suburb of Fordsburg two so-termed ‘first-class’ restaurants were available at the Planet Hotel, one serving à la carte the other a daily set menu. With the implementation of apartheid restrictions for segregated hotels the Planet Hotel was one of only four ‘non-White’ hotels that would accommodate African visitors to Johannesburg in the 1960s (Rogerson, 2020; Rogerson & Rogerson, 2020, 2024b). Close-by in Fordsburg was the restaurant, ‘Gaylords’ which advertised “exclusive meals and entertainment in cool candlelit surroundings” (Suttner, 1967, p. 11). In Newclare at the Hamilton restaurant ‘non-Whites’ also were welcome and with the weekend attraction of music and floor shows. The significance of these two restaurants is signalled by their marketing initiatives (Figure 2). In addition, there was the apartheid oasis of Kapitan’s restaurant in central Johannesburg, one of the few social environments where racial intermingling occurred. This restaurant was patronised by African professionals, Indians, whites and coloureds. Nelson Mandela and Oliver Tambo were among the regular patrons of Kapitan’s in Johannesburg (Hanes, 2006).

The decade of the 1960s marked an upturn for Johannesburg tourism among both white visitors and cohorts of African travellers (Rogerson & Rogerson, 2021b). In the early 1960s the national guidebook produced by the South African Institute of Race Relations (SAIRR) isolated the ‘non-white’ concourse at Park Station in Johannesburg as the most important hospitality space stating that it “has almost every kind of facility for the great mass of Johannesburg’s urban Non-Whites” (Keyter,

1962, p. 39). The centrally-located Park Station—the largest in sub-Saharan Africa—was established as the major railway station in Johannesburg and the leading nodal interchange between inter-city trains, local suburban trains, buses and mini-bus taxis. The station concourse was especially notable for its restaurant facilities for Africans. It was observed that the large restaurant “has become a meeting place where non-White journalists, writers, broadcasters, and professional and business men can gather for excellent food, expertly served, in pleasant and peaceful atmosphere” (Keyter, 1962, p. 39). In addition, the SAIRR guidebook reported on the food offerings and that at “the two cafeterias, a happy medium has been struck between foods of African custom and foods which can be bought in cafeterias all over the world, at prices within the average African means” (Keyter, 1962, p. 39).

In light of the racialized landscape of hospitality and the absence of other quality restaurants the station concourse must have been a hospitality oasis for Johannesburg’s ‘non-white’ elite and visitors. The SAIRR *Egoli guidebooks* in 1966 and 1967 also pinpointed the eating possibilities at the Non-White concourse of Johannesburg’s Park Station. This locale was described now as “fast becoming a centre of non-White social life as well as the transportation nerve-centre of the community” (Suttner, 1966, p. 17). Again, it was reiterated that this “has become the meeting place of non-White businessmen, journalists and others who appreciate first-class service” (Suttner, 1967, p. 17). At the hub of this elite social centre was a large modern restaurant with 200–250 person-capacity in a garden setting and with tables “set with soft napery and gleaming silver and five course meals are served by waiters in blue-and-white uniforms” (Keyter 1962, p. 39). Figure 3 provides a glimpse of the hospitality experience offered at the station restaurant.

Figure 3. The hospitality space at Johannesburg Park Station Non-White Concourse Restaurant



Source: Suttner, 1966, p. 18.

Alternative cheaper eating-out options for the mass of Johannesburg's ordinary (non-elite) African residents and visitors focused on the city's network of so-termed 'Native eating houses' which mainly were situated at the city periphery, near industrial areas or close to mines (Rogerson, 1988a). The origins of "Native eating houses" can be traced back to the earliest days of Johannesburg as a gold mining settlement (Rogerson, 1988a). The first such establishments were attached to mine concession stores for use by African mine workers. Sherman (2000) points out that in the early decades of the 20th century immigrant Jews, mostly unskilled and uneducated from Eastern Europe, sought out livelihoods in what in the racist language of the day were styled as 'kaffir eating houses'. These immigrant Jewish communities were marginalized by the white ruling class albeit were socially and politically privileged as compared to African workers. Sherman (2000, p. 505) elaborates that from "the turn of the century white South African racist attitudes held in contempt any occupation that provided basic services to blacks but prevented the opening of such trade to black entrepreneurs". Indeed, as documented by Rubin (2006) the only whites prepared to take on the role of 'kaffireatniks', as they were contemptuously styled, were Eastern European Jews for whom this was a rare occupation which was open to them.

In Johannesburg city and its surrounds both Hellmann (1936) and Cobley (2021) recognise two types of these eating houses which were differentiated on a quality basis into those which were 'rude and crude' and others seen as 'more refined'. Such eating house businesses continued operations into the apartheid period as segregated eating establishments for use by Johannesburg African residents and were potentially available to visitors. Ownership of these eating house businesses either was in the hands of Whites (mostly Jews) or Chinese persons. The prices charged and type of food offered in such establishments were "fairly uniform" (Suttner, 1966, p. 7). Typical fare consisted mainly of porridge and offal which was dished up in various forms (Rogerson, 1988a). The popularity of the Chinese-owned eating houses in Johannesburg was reportedly enhanced by the fact that most such establishments did "not object to clients bringing their own Bantu beer or 'European liquor' to drink with their meals" (Suttner, 1967, p. 7).

For 1966–1967 a profile can be gleaned from licensing data of the state of public eating facilities available to Africans in Johannesburg (Suttner, 1966, 1967). At this time the mix of options included the traditional long-established eating houses, many of which were attached to butcheries, the newer options of fish and chip shops, and smaller numbers of snack bars. The cohort of eating houses provided mainly lunches or suppers. The food on offer largely consisted of popular porridges and meat which was served in various ways. Prices to consumers varied according to size of portion and type of dish that was chosen. Reportedly, the licensed eating houses were inspected from time-to-time by health inspectors in order to ensure that required standards of hygiene were maintained both in the handling of food and the maintenance of premises (Suttner, 1967). In total there existed 121 licensed food establishments (eating houses, butcheries, fish and chip shops and snack bars) in central Johannesburg and in areas outside the city centre, mainly in industrial areas and close to mine compounds. 62 establishments functioned in the city's central areas and 59 in the surrounding peripheral spaces. Within the central area an uneven geography of licensed establishments was in evidence. In the

downtown of central Johannesburg 16 establishments catered for Africans, 19 in Marshalltown, 11 in Newtown, nine in City and Suburban, five in Ferreirastown, and one each respectively in Salisbury Claims and Wemmer (Suttner, 1966).

In the wake of the racial colour bar that precluded Africans from eating in white cafes, the licensed native eating houses during the 1950s held a virtual monopoly on the provision of refreshment services to the majority of Africans in Johannesburg – residents and visitors to the city. The inadequacy of the hospitality offerings of the eating house trade opened up market opportunities for other food providers. Additional eating-out options emerged in the city's informal economy of hospitality services. As the urban population expanded, African businesses multiplied to cater to the needs of African workers in the city as well as to the constant flows of African migrants. Many of these initial entrepreneurs were itinerant hawkers selling fresh produce from stalls or hand carts (Cobley, 2021). The most visible were the community of coffee-cart traders who first appeared and operated on the streets of Johannesburg in the late 1920s. The African-owned coffee-carts represent an early example of a fast-food trade, the historical geography of which is an exploration into the urban informal sector (Rogerson, 1988b).

The colourful history of coffee-cart trading in Johannesburg extends over three decades from the trade's initial emergence in the 1930s to its demise in the late 1960s (Rogerson, 1986a). At the beginning the African operated coffee-carts were small mobile stalls which were daily trundled through the streets of Johannesburg from inner residential areas such as Sophiatown to trading pitches in the 'white' city. Goodhew (2000) maintains the removals of people from the Western Areas – most notably from Sophiatown – constituted one of the most notorious acts of apartheid. The destruction of the community of Sophiatown and the forced removal of its residents is chronicled by Lodge (1981), Hart and Pirie (1984) and, by Pirie and Hart (1985). The distances between segregated African residential areas and the downtown area of Johannesburg therefore expanded because of the forced removal of residents from areas close to the inner-city to the townships of Soweto (Rogerson, 2025). A consequence of spatial distancing was the physical transformation in the coffee-carts as the wheels came off and the formerly mobile cart became a permanent immobile kiosk on Johannesburg streets (Rogerson, 1988b). Over the 30 years of their operations, changes occurred also in the nature of the food and refreshment offerings. The range of products provided by these informal hospitality businesses was considerably broadened. When they first made their appearance on the Johannesburg hospitality landscape the typical fare at these early fast-food vendors was restricted to the sale of tea, coffee, and a 'penny bun'. The menu offerings became increasingly diversified. By the late 1950s many carts were supplying bread, *vetkoek* (fried dough), sour milk, meat stew and porridge. Of note is that additional occasional offerings which were made at some carts of liquor and *dagga* (marijuana) (Rogerson, 1986a).

With expanding urbanization and industrialization of Johannesburg the numbers of carts rose slowly to 200 by 1943 and 662 by 1950. The decade of the 1950s – the early apartheid years – witnessed the most dramatic burst in coffee-cart trading which was spurred by a growing African urban populace, the opening of new industrial spaces, and the continued clearance of former African residential areas



close to the inner-city (Hart & Pirie, 1984; Pirie & Hart, 1985). The numbers of carts escalated to just over 1000 by 1955 reaching 2000 by 1962. In an urban environment wherein work canteens were exclusively for whites, the main patrons of the carts were factory workers. In response the coffee-cart entrepreneurs clustered their businesses in and around the industrial areas and peripheral spaces of inner-city Johannesburg. At the time of the rapid burst in this hospitality trade, women operators of coffee-carts make their first appearance. Historically, until 1943 the business of coffee-cart trading was entirely the preserve of male traders who in the early years of coffee-cart trading were able to enjoy an effective monopoly of the trade and good economic returns (Rogerson, 1988b). During the Second World War, however, the city's capacity to regulate a licensing system for the coffee-carts fell away with the result that the trading became 'informalised' and with ease of entry open to whomsoever wished to enter this hospitality business. The end of licensing for the coffee carts witnessed a boom in the number of carts as well as triggering a transformation in the gender composition of traders. African women moved into this informal economic niche for the provision of hospitality services not least because of the minimal employment opportunities available to women for formal sector wage-employment (Rogerson, 1986a, 1988b, 1989).

As documented by Rogerson (1989) the municipal authorities disapproved of the operations of these food traders. From the mid-1950s a systematic campaign—'the war of the coffee carts'—was launched to end their hospitality operations in the city. The municipal authorities triumphed and 1965 saw the close of this informal food trade with the removal of the remaining coffee-carts from Johannesburg pavements. Towards the close of the 1960s such repressive actions further constrained the hospitality service options for African residents as well as their visitors in the racialized (in) hospitality landscape of Johannesburg.

Drinking alcohol in Johannesburg

Historically, the production, consumption and control of alcohol has shaped the evolution of an industrial society across much of sub-Saharan Africa (Crush & Ambler, 1992). A common feature of colonial towns in Southern Africa was the institution of the 'beer hall' serving a low alcohol (less than 3 percent) traditional sorghum beer which was manufactured under a municipal monopoly for retail to the African labour force (Chimhete, 2018; Hutton, 2023). In settler-colonial societies across Africa prohibitions on local beer production and consumption were targeted to ensure a supply of sober labour for the capitalist economy (Crush & Ambler, 1992). In addition, government controls on the sale of beer in municipal beer halls were implemented to raise revenue for the development of segregated residential townships. Essentially the oppressive beer hall system was organised for dual purposes, namely, to fund rudimentary welfare and housing services for workers whilst at the same time consolidating control of drinking and sociality (la Hausse, 1989; Hutton, 2023).

The history of beer halls and of municipal control of beer in South Africa has been well-documented (la Hausse, 1989, 1992; Mager, 2010). In brief, its origins were in colonial Natal where legislation

passed in 1908 led to the commercialisation of traditional beer in urban areas when the colonial legislative assembly authorised the provision for the establishment of a municipal monopoly by town authorities in the colony (la Hausse, 1984). This legislation paved the way for the growth and wider spread of factory brewing under the instigation and control of municipal governments following the formation of the Union of South Africa in 1910 (Rogerson, 1986b). The Durban Town Council was the prime mover in establishing municipal monopoly and provided the basis of what became termed ‘the Durban system’, a particular form of Native administration which became a model for the control and exploitation by South Africa’s (white) ruling classes of (black) African communities living and working in urban areas (la Hausse, 1984, 1992). At the core of this model was that the social costs of African labour in cities would be subsidized by profits from the municipal beer monopoly which funded a separate “Native Revenue Account” for the costs of policing and administration of segregated townships as well as for the maintenance and establishment of barracks, beer halls, hostels and beer breweries (la Hausse, 1989). Under the Durban system of municipal monopoly over the drinking of sorghum beer, Africans effectively were paying for their own segregation as the profits from municipal beer were used for municipal Native administration.

From 1910 only a slow take-up occurred of municipal monopoly and municipal brewing from its Natal heartland (Rogerson, 2019). Its adoption was blocked in the Transvaal by prohibition legislation which was enacted in 1897 at the behest of mining capital on Africans access to alcohol. One incentive for change was the passage of the 1923 Native (Urban Areas) Act which charged urban municipalities in South Africa with responsibility for housing Africans as well as affording powers for municipal monopoly (la Hausse, 1989). In 1937 national government introduced watershed legislation under which municipalities could no longer enforce prohibition and instead *required* municipalities to assure the supply of sorghum beer (Rogerson, 1986b; Mager, 2010). Many urban municipalities in the Transvaal, including Johannesburg, now embraced municipal monopoly and factory brewing for the funding of administration and servicing of townships. The municipal beer halls were granted the legal monopoly on the sale of sorghum beer within cities and their environs.

Johannesburg adopted the institutional system of municipal monopoly with the accompanying opening of beerhalls in 1937 (Rogerson, 1986a). The municipality’s controversial decision to establish beer halls raised a storm of protest variously from church representatives, sections of the white community as well as from Africans with threats to call for boycotts (“Municipal Beer Halls Condemned”, 1937). Despite such calls, what was described as the city’s ‘New Year gift to Africans’ occurred on 1 January 1938. A temporary beer hall and eating house was opened in the Salisbury Compound, the first of several to be established across Johannesburg (“City’s New Year Gift to Africans”, 1938). As Mager (1999, p. 368) details, the profits from sorghum beer sales in Johannesburg municipal beer halls “were not inconsiderable”. The seemingly successful introduction and expansion of the beer halls therefore was greatly appreciated by the municipal authorities which argued that its actions were taken only “in the best interests of the Natives” (“City’s New Year Gift to Africans”, 1938). This said, two objectives underpinned municipal actions beyond the benefits of

funding flows into the Native Revenue Account (Crush & Ambler, 1992; West, 1994). First, it aimed to control the drinking habits of workers and thereby to minimize impacts of alcohol on social stability as well as production. Second, it sought to eliminate the activities of women brewers – *skokiaan* queens – who were blamed both by employers and municipal officials for worker absenteeism, crime and drunkenness (West, 1994). Across South Africa the initiation of municipal beer halls galvanized angry opposition and protests (la Hausse, 1982, 1984, 1989). As Mager (2005, p. 163) details: “African women resented losing their right to brew and that men wasted their earnings”. Furthermore, “Men objected to the unpalatable mass-produced brew served without respect” (Mager, 2005, p. 163). According to la Hausse (1982: 63) the drinking experience in beer halls could be likened to ‘drinking in a cage’.

The rollout of the municipal monopoly system and the growth of beer halls continued into the post-1948 apartheid period, a time when the drinking of alcohol by urban African continued to be bound up with illicit economic and social behaviours around shebeens² (Mager, 2010). The location of beer halls in Johannesburg during the 1950s was influenced greatly by apartheid legislation for social engineering. The drive for racial-spatial segregation precipitated the removal from areas of ‘white’ Johannesburg of the centralized beer hall system which was broken up into smaller units many of which were relocated into township areas (Rogerson, 1992). The 1966 and 1967 SAIRR guides to Johannesburg for Africans confirmed the uneven geography of beer halls in the city. It was flagged that there are “no African beer halls in the central city area” and that “most of them are adjacent to the men’s hostels and compounds” (Suttner, 1966, p. 10). Potential visitors to Johannesburg were informed that “Bantu beer at the beer halls and off-sales depots can be purchased in various quantities at the rate of 20 cents a gallon” and that the beer was manufactured by the municipality which applied the profits to support amenities for Africans (Suttner, 1967). The three beer halls that were detailed were at the Denver, George Goch and Wolhuter hostels. The Denver beer hall was sited 100 yards from the main hostel entrance, and patrons “buy their beer and drink it under the tall shady trees or in the shelters provided” (Suttner, 1967, p. 10). It was stressed that only municipal beer could be purchased and that no so-termed ‘European liquor’ was for sale. The listing for Wolhuter Bantu Men’s beer hall simply noted its location at the entrance to the hostel and likewise that for the George Goch Beer Hall where it was recorded also that “conditions in general are the same since all the beer halls fall under the jurisdiction of the City Council” (Suttner, 1967, p. 10). Beer halls were another integral component of the unwelcoming landscape of hospitality for both Johannesburg’s African residents and visitors to the city during the period of high apartheid.

Finally, in terms of ‘drinking apartheid’, during the decade of the 1960s the role and changing character of shebeens merits some attention. The chequered history of the shebeen has been the subject of several scholarly investigations. The work of Mager (2007) traces since the 1890s the evolution of shebeens from backyard informal economic business to major landmark in the economic and social landscape of urban South Africa. It highlights the web of connectivities between liquor, commerce and politics. Arguably, the shifting nature of the shebeen is inseparable from the historical changes in

² Informal, often unlicensed establishments selling alcohol, historically significant as social and resistance spaces.

legislation which surrounded the supply of liquor to Africans. Between 1890 and 1962 the legislation turned full cycle from full availability through total prohibition and back to full availability (Schärf, 1984). Alcohol sales—or more specifically European liquor sales—to Africans in colonial South Africa were subject to the 1928 Liquor Act. Under this statute (Act 30 of 1928) no one anywhere in South Africa could sell, supply or deliver any liquor to Africans, nor could Africans be in possession of liquor (Higginbotham, 1994). This legislation concerning the selling of European liquor was widely flouted through the networks of informal shebeens in urban areas (Rogerson & Hart, 1986; Mager, 2010). Prohibition legislation remained in force until 1962; change occurred only with the passage of the 1962 Liquor Amendment Act which lifted controls on Africans as consumers of European liquor (Mager, 1999).

Until 1962 the most important and legally available alcohol for urban Africans in South Africa therefore was sorghum beer sold through the conditions of municipal monopoly (Mager, 2007). But, denied access to the formal outlets of liquor supplies, many African consumers of alcohol had turned to the supplies offered illicitly through the informal economy of shebeens and in preference to the inhospitable environments of the municipal beer halls. In particular, the period following the end of the Second World War witnessed an enormous upturn in the shebeen trade in Johannesburg. This expansion accompanied a shift away from the former production of home-brewed beers and liquor concoctions instead increasingly to the retailing of forms of ‘White liquor’ which was not supplied through the municipal beer halls (Rogerson & Hart, 1986). By the 1950s shebeens were described as a ubiquitous feature of Johannesburg city life and situated at the heart of a thriving illicit liquor trade (Mager, 2010). A differentiation in status emerged between patronage of certain (elite) shebeens and the beer halls. It was observed that an enormous gulf existed between the consumption of ‘White man’s liquor’ within the ‘club-like’ atmosphere of such notable shebeens as the ‘Back of the Moon’, ‘The Thirty-Nine Steps’, ‘Falling Leaves’, or ‘The White House’ and the drinking of sorghum beer in the sterile environment of municipal beer halls (Rogerson, 1990). Leading African creative writers such as Can Themba and Nat Nakasa celebrated these contrasts and described such shebeens as hospitable spaces which stood in stark contrast to the inhospitable spaces offered by Johannesburg’s municipal beer halls (Hart & Rogerson, 1987).

The decade of high apartheid following the lifting of prohibition was a period of considerable change for the shebeen trade as a whole. It was a time when the state hoped township residents of Soweto would be lured away from shebeens by the opening of new municipal-run outlets for liquor sales to parallel the municipal beer halls which by the early 1960s were increasingly situated away from central Johannesburg and in Soweto’s regimented townships (Rogerson, 1992). Nevertheless, the shebeen trade grew and thrived in the wake of the minimal attractions of drinking traditional sorghum beer in beer halls. The widespread geographical distribution of shebeens further contributed to their popularity. This contrasted with the typical siting of beer halls either close to railway stations (from which residents would have a distance to travel to the safety of home) or in the environs of the ugly single-sex hostels (Pirie & da Silva, 1986; Rogerson, 1990). Other factors further enhanced the

attractions of shebeens as hospitable spaces as compared to beer halls which were governed by rigid opening hours, lack of credit facilities and a regimented rather than convivial atmosphere for alcohol consumption. Above all, municipal beer halls became identified – along with new municipal run liquor outlets in townships – as symbols of apartheid oppression (Rogerson, 2019).

Further contributing to the buoyancy of the shebeen trade was the activities of large liquor companies which were seeking to accelerate a taste transfer of township residents away from traditional sorghum beer to ‘European liquor’, including lager beers and wines. The character of the shebeen trade was restructured alongside the aggressive marketing of their products by the powerful leading liquor companies. A network of informal linkages was forged which tied the profits of the large liquor producers “ever more closely to the fortunes of informal sector shebeeners” who became effectively ‘disguised sellers’ for these large business enterprises (Rogerson, 1990, p. 296). By the close of the 1960s the vigorous marketing campaigns run by the large liquor companies had impacted the drinking consumption patterns of a substantial segment of Johannesburg’s African residents. Sorghum beer sales were in decline, increasingly confined to those in the lowest income groups, the elderly and less educated (Rogerson, 2019). Shebeens had transitioned from the production and sale of home brewed beer and the preparation and retail of liquor concoctions to the selling of ‘European liquor’ including clear lager beers. With this transformation many (if not the majority of) Soweto township shebeens became absorbed into the distribution chains of South Africa’s leading liquor chains. During the ensuing decade of the 1970s these large liquor enterprises would be in the vanguard of support for the transition of informal shebeens to become formal licensed township taverns.

CONCLUSIONS

An awakening of research interest is taking place about hospitality’s past. Existing historical research on the development of the hospitality industry, however, concentrates upon environments for food and drink in the Global North (Scholliers, 2009; Mac Con Iomaire, 2013, 2014; Spang, 2019; Kneale, 2021). This article is novel in that it contributes a historical perspective on the landscape of hospitality services that evolved in South Africa. More specifically, it is original in its focus on the hospitality offerings to the African population which was subordinated during the years of segregation and apartheid South Africa. The racialised landscape of the hospitality sector in Johannesburg discloses the everyday importance of both a formal and informal economy which surrounded the provision of food and drink especially in the apartheid period.

It was demonstrated that the formal and informal economies of food and drink created different spaces of hospitality in apartheid Johannesburg during the 1950s and 1960s. For a small elite, opportunities existed for eating-out in the handful of restaurants or other establishments in the city which would serve African patrons. But, for most ordinary African residents in Johannesburg everyday life was linked mainly to the less salubrious surrounds of the Native eating house or as an alternative the more hospitable world of the informal coffee-cart trade. The drinking of alcohol

similarly produced differences in the spaces of hospitality with a marked contrast between the dreary regimented atmosphere of the municipal beer halls as opposed to the warmth of welcome to be experienced at many Johannesburg township shebeens. As final comment it would be argued that the history of hospitality and of hospitality spaces for the provision of food and drink services merits greater attention on the research agenda of hospitality scholars in the Global South and most especially so in the context of sub-Saharan Africa.

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Pathways to Adaptation – The Rationality of “Think Global, Act Local”: A Case Study of Székely–Hungarian Community of Romania

ABSTRACT

This qualitative case study employed an interpretive-social constructivist approach to examine the rural decline of Székely–Hungarian villages and their cultural landscapes in Romania. The convergent interview method was used to understand landowners’ decision-making processes and their „think global, act local” responses, which influence community, village, and landscape. Local-level adaptation processes to global challenges, such as climate change and natural resource depletion, are unfolding in „real time and space” within this ethnoregional context. A locally articulated rationality was captured through the adaptation strategies of six emerging personality types: “intellectual peasants,” “heirloomers,” “locally rooted farmers,” “necessity farmers,” “hoarders,” and “floaters.” Each of these personalities is attributed with key human developmental characteristics, which are perceived to influence the Székely ethnic village and cultural landscape, with implications for local and global sustainability goals.

Keywords: local adaptation, ethnic minority, cultural landscape, Southeast Europe, local sustainability, rural decline

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INTRODUCTION

The social, economic, demographic, and institutional causes of rural decline, such as depopulation of villages, as well as voluntary abandonment of homes and land, and subsequent spatial change are extensively documented in post-soviet European countries (Munteanu et al., 2014; Alcantara et al., 2013; Prishchepov et al., 2013; Kuemmerle et al., 2009). Many rural areas are shrinking within Europe and centuries old landscapes are fading. A recent study examined the risk of areas becoming sparsely populated within Europe (ESPON EGTC, 2024a). They found that “large parts of the Baltic countries, Romania and Bulgaria as well as Serbia experienced a strong decrease in their potential between 2011 and 2021 due to negative demographic processes,” but the capital regions (p.12). EU policy recommendation identified rural shrinkage as a policy priority because rural areas in EU states are projected to lose 7.9 million residents by 2050, resulting in a shortage of innovation capacity and unstable governance (ESPON EGTC, 2017). Eastern, Southeastern and Southern European regions will experience more severe rural decline and innovation capacity loss than other regions through the outmigration of skilled labor and talents. Without a comprehensive policy strategy, these regions will retain a lower capacity to adapt to such transformations and face greater uncertainty for local governance intervention (ESPON EGTC, 2017).

The cultural landscapes of small sustenance farms are existentially threatened by urban land conversion, land intensification, and agricultural/land abandonment (Schulp et al., 2019; van Vliet et al., 2015). This is occurring simultaneously in both the developing and the developed world. In the European Union (EU), Western and Southeastern and Eastern Europe have experienced distinct institutional and industrialization changes. In the West, land use and land cover change can be attributed to gradual urbanization and industrialization. In the East-Southeast, it has been due primarily to institutional changes (summary after Baumann et al., 2011). Spatial studies of these landscapes identified the primary drivers of land abandonment to be social, economic, demographic, and institutional (Munteanu et al., 2014; Kuemmerle et al., 2006). In addition, physical drivers (e.g., steep slopes) and biophysical drivers (e.g., low soil fertility) are frequently assigned as causes of land abandonment (Baumann et al., 2011). Centuries-old rural landscapes where significant accumulations of historic, cultural, traditional, and artistic value have been interwoven into the natural fabric, are in danger of disappearing despite their value in terms of rural identity (Bezák & Dobrovodská, 2019; Pentz & Albert, 2023; Kovács et al., 2024), and ecosystem services (Hartel et al., 2014). These cultural landscapes also have high value in terms of their biodiversity that “are threatened by land use changes and the abandonment of traditional farming techniques” (Hanspach et al., 2016, p. 853). Worldwide, rural communities find themselves faced with the dual pressures of adjusting to changes at the local scale, while simultaneously dealing with complex and nested hierarchical relationships at much larger scales (Papadopoulou et al, 2023, Winkel et al., 2016). For example, suburbanization of rural minority settlements (Hungarian) within the vicinity of core urban hubs by a majority population (Slovaks) may bring complex issues for the ethnic minority who historically established itself within the area (Balizs

& Somogyi, 2024). While previous studies from the Southeastern European region have studied how communities change spatially and institutionally, the complex nature of social-ecological adaptation processes and interlinked hierarchical nested relationships needs more understanding (Hartel et al., 2016).

Acknowledging different scientific approaches and language-based publications remains a major area to cover along with their deliverance to English language-based audiences such as a review by Díaz-Reviriego et al. (2024) on biocultural approaches to sustainability from the Spanish language literature.

Southeastern European rural communities in spatial studies are often simplified as spatial, geographic, or political entities. However, such communities are also constructs of the people who live on, work on, dream about the future of the land. Rural communities are socially, ecologically, and economically interlinked systems (Hanspach et al., 2014) where people’s experiences, memories, and desires continuously shape how they experience a place as they “adapt to them and to themselves” (Ndubisi 2002, p. 112). Communities adapt to change, and adaptation processes can be influenced by their traditions, rituals, customs, and behaviors (see Berkes et al., 2003). Hay (1998) in his cross-cultural study of “rooted sense of place,” (p. 245) found that sense of history, tradition, spiritual and ancestral ties to land are essential elements that help sustaining not just indigenous communities but could help modern ones. This would require replacing the “commodity” view of place (e.g., for housing, for work) with one, that promotes ties and rootedness (Hay, 1998).

The Southeastern European country, Romania (RO) lost substantial talent and citizens to foreign work, specifically “Romanian emigrants were the fifth largest group of emigrants residing in OECD countries” in 2015/16 (OECD, 2019, para. 2). This meant that “17% of the total Romanian population [aged 15 and above did emigrate]” (OECD, 2019, para. 2). Romania was the leading country “in the ranking of emigration rates for the top ten origin countries of emigrants living in OECD countries” for year 2015/2016 (OECD, 2019, para. 2.) Therefore, unless local scale dynamics are incorporated into the planning for adaptations that conserve and protect important rural cultural landscapes, these landscapes will continue to vanish.

Rural community and landscape changes caused by political system transitions have been fertile ground for studies in the Southeastern and Eastern European regions, including Romania, where upheavals in political institutions have been frequent, abrupt, and multitudinous (see Verdery, 1983, 2003; Stoian, 2010, Hartvigsten, 2010). However, the decline, disappearance, and rapid transformation of rural villages, and their place in the natural fabric of this region of the world remains poorly examined, especially in terms of ethnoregions, sustainability, and minority landowners’ decision-making narratives.

This study looks at change as an inevitable and necessary process that communities engage with through complex and dynamic adaptation processes, rather than through linear cause-effect relationships. This view was influenced by resilience thinking discussed by Holling and Gunderson (2002), Walker and Salt (2006) and others (Cumming, 2011; Folke, 2016). The boundaries for

place-based change and intervention (e.g., governance) can be set by the spatial context of regional extent of place. This can be found at the intersection of people's experience and "activity system" (social, ethnic, and economic), the environment (natural and built) (Ndubisi, 2002, p. 113) and the ethnoregion (the boundaries of the Székely–Hungarian ethnic bloc). The capacity to successfully adapt through change is crucial for resiliency in social ecological systems such as cultural landscapes. A community's cohesion is itself a product of the strength of "inter-generational social connections," "cultural identity," and "the "capacity [...] to advocate for, and acquire," the resources necessary to adapt through change (Liebenberg et al., 2017, p. 43).

Most of the literature does not address cultural and ethnic variability within regions from a bottom-up approach but focuses on larger spatial extents of landscape change like land abandonment and social-economic aspects of rural decline. Place-based, bottom-up local dynamics remain unattended and rural decline, from an ethnoregional perspective, is poorly addressed in international research studies. Good research has been done on cultural landscapes from this region by Hanspach et al. (2014, 2016), or Hartel et al. (2014, 2016).

Studies provide recipes, or strategies, on how to resolve social, economic, and cultural challenges linked to shrinkage or rural decline (ESPON EGTC, 2025). They provide valuable findings (i.e., Latocha-Wites et al., 2024, ESPON EGTC, 2024b), but in essence, they remain frameworks that recommend the incorporation of different voices aligned to centralized top-down agendas of nation states and supranational systems of the European Union. Such systems are rigid and remain non-inclusive as national agendas cloud true democratic processes. Many times, these studies address culture but not ethnicity. Culture does not equal ethnicity, nor do such initiations consider a minority's presence as a block with a complicated and centuries long land attachment that drives their identity, or their will for self-determination as a community (Pap, 2021). Complex changes have not been addressed, and rural development initiatives are not sensitive enough to local ethnic diversity (Pap, 2021; Tésits & Alpek, 2017). Land abandonment is one of the main drivers of rural decline and consequent fading of cultural landscapes with characteristics such as high biodiversity meadows. While rural decline is widely accepted as a prevailing issue, it was observed that some villages seemed to be stronger than others in terms of a cohesive community, and liveliness and defy rural decline. This study grew out from such observations.

This qualitative case study used an interpretive-social constructivist approach to study the Székely–Hungarian ethnic minority living in Harghita County, Romania. The chosen study area encompasses the most densely populated block of Székely–Hungarian minority who still adhere to their traditions and have a distinct culture from the majority of the population (Romanian). Their local adaptation mechanism to rural social, environmental, institutional, and demographic changes is discussed. We used a grounded, bottom-up approach where findings were placed in context with the human development literature of personal (individual) resilience. Personal resilience, after Liebenberg et al. (2017), Masten (2016) and Taormina (2015) defined as the pathway of positive adaptation where individuals have the capacity to:

- (1) to function and cope with chronic stressful situations,
- (2) transform sources from the environment (social, economic, personal etc.) into resources, and
- (3) make sense of events during change times.

The findings of this study complement the predominantly spatial and ecological body of work that has been carried out at larger scales to date. Furthermore, they highlight the importance of focusing on local-scale dynamics and individual resilience for future cultural landscape adaptation and community resilience studies.

METHODS

This study uses an interpretive approach, with a social constructivist orientation to study “why do some villages decline while others do not?” Studies with an interpretive approach systematically study “socially meaningful action” to which “people subjectively attach significance” (Neuman, 2006, p. 88). These actions are studied through “the direct detailed observations of people in natural settings” (Neuman, 2006, p. 88). This is done to understand and interpret how people “create and maintain their social world” (p. 88). The constructivist orientation assumes that social reality is created through “the interactions and beliefs of people” (p. 89). The “constructivist paradigm assumes a relativist ontology (there are multiple realities,” and that the researcher and “the respondent cocreate understandings” (Denzin & Lincoln 2005, p. 24).

Dick’s (2017) convergent interview method was employed for this study, and a detailed literature review on rural decline preceded the formulation of the research questions. Convergent interviews, “can be described as emergent and data driven. It has multiple inbuilt sources of research rigor. It is time-efficient compared to many interview processes. Its uses for research include emergent research and pilot studies” (p. 1).

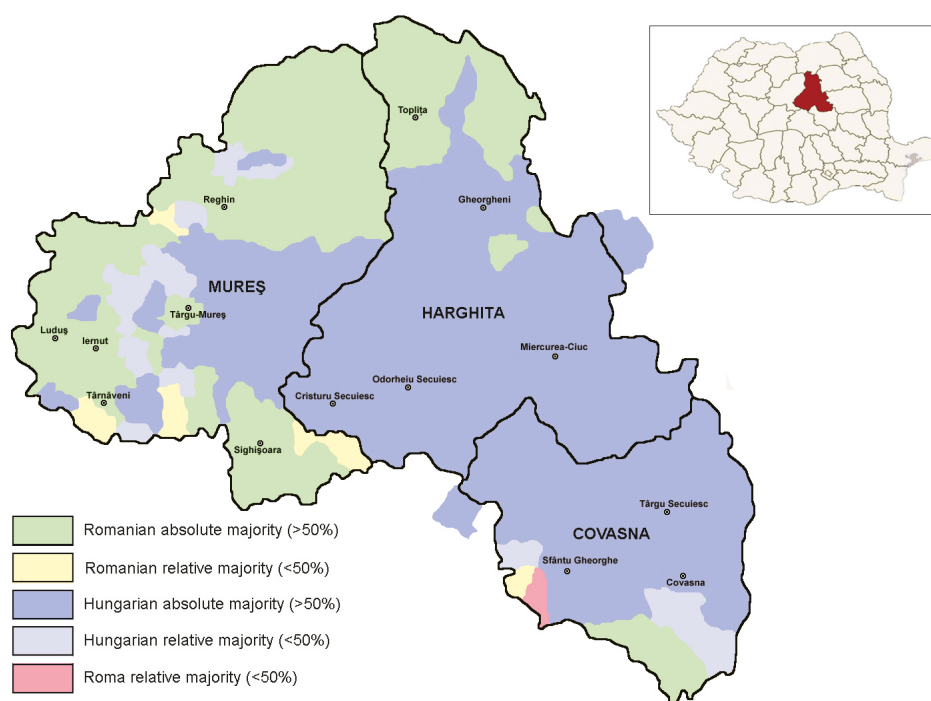
Convergent interviewing has a built-in authentication process, and as content emerges and gets built it gets authenticated in subsequent interviews through continuous probing of the content, and to the emerging “theory (or interpretation, diagnosis or evaluation)” (Dick, 2017, p. 4). All interviews start with one “broad question,” and the collected data is interpreted and processed after each pair of interviews (Dick, 2017). Probing “sub questions” are allowed to vary between interview pairs. A set of interviews “closing questions,” which differed from Dicks’ method, were asked in this study. This inclusion was specifically requested by the IRB to reduce the broadness of the study and qualify for approval.

The heart of the method lies in gaining an informed insight into the local context by starting with a broad overview and narrowing it down through: (1) a systematic process of pairing respondents (more than one interviewer) or lining them up (one interviewer) to achieve a “maximum diversity of sample” (Dick, 2017, p. 9); (2) identifying agreements and disagreements among interviews; and (3) formulating probing questions and cross-checking for the causes of agreements and disagreements among interviewees (Dick, 2017).

Study area

The study area is in Harghita County, Romania. The county is part of a historic ethnic region known as Székelyland inhabited with Székelys, a Hungarian speaking ethnic minority. This region is mostly bounded by three counties of Mureș, Harghita and Covasna (Figure 1). Molnár et al. (2015) has a relevant and concise summary of the region, its landscape features, history, and traditions. Harghita County has the highest Hungarian–Romanian population ratio in the country and one of the few counties, where ethnic Hungarians constitute most of the population. According to the 2021 Census the county's total population was 291,950 where 79.51% (232,157) of the population identified as Hungarians, and 11.52 % as Romanians (33,634). The rest of the population <2% identified as Roma, or another ethnic group (INS, 2025a). The urban population in 2024 was 45.15% and rural population was 54.85 % (INS, 2025b).

Figure 1. Ethnic map of Mureș, Harghita and Covasna counties of Romania (2021)



Source: INS, 2025a

Interviewee selection

Participant selection criteria were established based on the literature on rural decline within the region and through the local knowledge of the main author who grew up in villages within the study area and was exposed to traditions and experienced institutional changes at first hand (the fall of communism in 1989, becoming a democratic state and an EU member). Throughout three decades she has engaged with the land, community, and people. She served as a local expert for establishing the inclusion

criteria for participant selection. As she examined the literature, she observed that the reviewed literature did not explain why rural decline was not evenly distributed across the cultural landscape of Székelys. For example, she noticed the work of priests in village communities. Historically priests and teachers are key community builders and leaders of villages within the study area. Such expertise was necessary for securing human-subject approval.

Participants were selected based on their landownership, or their prospect of inheritance, because villages and their landscapes are mostly made up of small parcels, larger tracts of church properties, and the commons. Lastly, participants who were not landowners, but were affiliated through their work with villages (voluntary/for-profit/official capacity), were included as participants because their work was directly affecting communities and may contributed to fighting rural decline. A maximum diversity of sample (see Dick, 2017) was compiled through involving local experts, and through snowball sampling. Interviews were collected during the summer of 2019. The collected data was part of the first author’s dissertation study and can be found in Pap (2021). The conceptualization and findings have not been part of this dissertation.

The study was reviewed and approved by Texas A&M IRB’s Human Subject Research Protection Program as minimal-risk research. In summary, the IRB-approved selection criteria were as follows:

1. Individuals who were living in villages in Harghita County, Romania
2. Individuals who owned land, but did not live in the villages anymore
3. Individuals who were first, second, and third generation of people of 1 and 2 above
4. People who worked as teachers, priests, and served the community in various ways
5. Individuals of 18 years, or older

The broad question focused on the decision-making of people, and served as a basis for starting and setting the direction of conversation: *“What are some of the key decisions that you and your family (or community) have made (in the past 20 to 30 years) that have influenced the way you (they) live and the way (they) you manage your (their) land?”* Pre-identified questions captured important aspects of rural decline and were left broad for capturing meaningful information, and allow participants to express themselves:

1. “What were the reasons of the ... (identified) decision?”
2. “Why do you think people abandon their land in your community?”
3. “Can you identify any special outcomes of their decisions?”
4. “In your opinion what makes a community strong?”
5. “In your opinion why do rural communities decline in Romania?”

A total of eighteen respondents were interviewed (Table 1) and sixteen interview sessions were conducted, which was reported in the literature to be an acceptable number (Dick, 2017). Eighteen respondents were audio recorded, and audio recording was optional to participate. Three interviews were conducted with three married couples. Individuals voluntarily gave consent. Both females (10) and males (9) were included.

Table 1. Pairs of respondents

Pair	# ID	Occupation, landowner status
1 st	11	Elementary school teacher in a “comună,” small sized land holding, permanent city dweller, house owner in a village.
	2	Representative of a local council, medium sized land holding, farmer, resident of a village.
2 nd	7	Mayor of a “comună,” small to medium sized land holdings.
	26a, 26b	Elderly married couple, small to medium land holdings, farmers (age 85–90).
3 rd	19	Unitarian village priest, villager, large church land holding.
	21a, 21b	Young married couple, young farmers (age 25–30), small to middle sized land holding, dairy farmers.
4 th	9	Family business owner, small land holding, villager.
	31	Dairy farmer, large land holding.
5 th	28	Family consultant, therapist, child protection professional, social worker, city dweller.
	32a, 32b	Small land holding, permaculturist, city dweller.
6 th	1	Unitarian priest in a city, serves couple of small rural Unitarian congregations.
	17	Rural development professional, civic actor, works with grants, villager, small, or small to medium land holding.
7 th	14	Dairy farmer, villager, small to medium land holdings, retired rural development professional.
	5	Civic actor, grant writer, new village resident, small land holding.
8 th	16	Reformed priest, dairy farmer, large church land holdings.
	29	Civic grant writer, active community builder, small land holding, villager, works in a city.

Small land holdings: < 5 ha, small to medium 5–10 ha, medium 10–15 ha, large to medium 15–25, large land holdings > 25 ha (including rented land, forested, and arable land)

Data Analysis

Data analysis was conducted in two phases. First, most of the data analysis was carried out concurrently with data collection. The data was processed to gather information from converging and diverging answers, as per the method (Dick, 2017). Field notes, and reports were written, and audio recordings were listened to identify convergence, and divergence among interviews. Second, transcription of audio recordings, conceptualization, and write up.

During data collection, attention was paid to agreements and disagreements in answers. After the first four pairs of interviews (Table 1), a general narrative began to emerge. During the interviews that followed, the narrative converged more convincingly around repeated key themes that suggested pathways to adaptation over the past three decades (1989–2019). These themes included:

- (1) concept of self, family,
- (2) the role of education and upbringing,
- (3) community, and
- (4) local dynamics – such as participation in local activities and maintaining the land.

Transcription of the interviews was carried out using an online automatic transcription service through *sonix.ai*. Interviews were uploaded and automatically transcribed. The transcribed text then was corrected and rechecked second-by-second and line-by-line. It resulted a total of 620 single spaced



pages of transcribed text, with an estimated 280–300-man hours. Quoted interviews are not stylized, but quoted in a “raw” format, and were only altered, to convey the meaning for English readers.

The results are presented by (1) analyzing agreements and disagreements in responses, which converge into a broad narrative around key topics; (2) identifying interlinked subject areas that shape local adaptation strategies, categorized into six perceived personality types of heirloomers, intellectual peasants, locally rooted mid- and large-scale farmers, floaters, necessity farmers, and hoarders/for-profit agribusiness farmers; and (3) discussing the findings through a human development perspective.

One hundred and sixty-three themes (see Appendix A) emerged during convergent interviews and were probed for agreements and disagreements between interview pairs and the emerging narrative. Themes were grouped into broad *first order* categories⁵. The first order themes were further categorized into *second order* categories based on their specific attributes and/or their “multidimensional” meaning considering the contexts they were discussed⁶.

RESULTS

Rural identities and sustainability in transition

The emerging converging and diverging narrative confirmed the literature, especially regarding Romania’s transition from communism to democracy and the instability, and chaos that followed (see Verdery, 2002, 2003; Cartwright, 2001). Further, it converged along key attributes of self, family, community, village, landscape, historic ethnic region, state, and the EU (Table 2).

The convergence and divergence patterns lent themselves to a description of six distinct types of rural personalities based on the perceived behavioral attitudes towards the Székely village, community, landscape, and region. The six types can be broken into two main groups. First, those who actively contribute to the self-sustainability of the ethnic region (*heirloomers, intellectual peasants, locally rooted farmers, and necessity farmers*) while observing some, or all of the seven virtues through their decision-making and way of life. Second, those who are either disinterested (floaters) or use practices and attitudes that exploit resources and break up the centuries old landscape (*hoarders/for-profit agribusiness farmers*).

⁵ L=landscape, VC=village community, I=individual, F=Family, FM=Farming, O=Other.

⁶ The second order categories are FM=Farming, INC=Income, IA=Individual Assets, VC=Village Community; SWMOB=Seasonal Work Mobility, LM=Land Management, F=Farming, O=Other, EDU=Education, Knowledge, Upbringing, EMPL=Employment, ABR=Abroad, O=Other, OTL=Outlook (future, do business), INV=Investment, Lead=Leadership, ETH=Ethnicity, INC=Income, PROF=Profitability, CUL=Culture, COMM ELEM=Elements of community; Variability, F=Family.

Table 2. Themes of rural life and sustainability: diverging and converging perspectives in the Székely–Hungarian context

Diverging themes
• Going abroad vs. staying home to make money, and how earned money is spent. • Young generation's irresponsibility vs. responsibility. • The perceived burden and disadvantage of keeping animals, and maintaining the land, rather than renting, or abandoning the land. This was expressed as “enslaved to the land and to farm animals” vs. not. • Influence of the developed and modernized West e.g., conservative vs. liberal approaches to raise a family, negative influence of agricultural intensification and its perceived benefits considering the cultural landscape's ecology.
Converging themes
• Self: a complicated theme that includes the importance of personal belief, faith, ethnic belonging, worldview, mentality, and the presence of seven virtues (prudence, wisdom, justice, courage, temperance, faith, hope, and love). Self is nested within the immediate family, community, village, and landscape topics. • Family: responsible roles for each family member, the role of upbringing, family level models of sustainable living, family structure, and the family's role in the community. • Community: generational differences, key elements that make a community strong, historic burden of ethnic belonging, the importance of language, the importance of good examples. • Villages: the role of strong leaders/residents, priests' and teachers' roles, creative initiations, the importance of good examples. • Landscape and farming: change has been fueled by EU grants and subsidies, landscape attachment (e.g., renting, abandoning, or working the land), changing farming typologies. These ideas are related also to the way one relates to the land itself, including the concept of living ‘in the land’ not ‘off of it’, the importance of cooperatives / collaborations, what it takes to be a good farmer, and the younger generation's ties to the land. • Knowledge, education, and upbringing: public education, local knowledge, training, and exchange programs, spread of knowledge, and perception of the value of hard work and step-by-step achievement. • Talent abroad, or talent drain: seasonal workers, lack of professionals, lack of labor. • Housing: unsustainable modern building, restoration of vernacular houses and buildings. • Institutions and governance: legislation and ordinances are out of touch with historic local ways of living. For example, where cows are allowed to be kept in a village. There are common concerns regarding local leaders, corruption, and EU projects. • Civic activity: building capacity, advocacy. • Future: uncertainty, inability to imagine.

Six rural personality types

Intellectual Peasants: The intellectual peasant has some history of working on land, often in a family setting. However, this personality also has pursued some higher education or has a strong drive to self-educate and grow. At some point in their lives, they consciously made the choice to live in a rural setting, though they might have traveled and been exposed to new ideas. The term “intellectual peasant” was used by one of the respondents, and so is an example of a narrative component emerged from the data. There are two types: people who do not live off any EU or state funds, and grants. The other type is those who use EU and state funds to some extent. In a family setting, they have started to live a life that is set by traditions, worldviews, and frames of reference regarding the past, present, and future. Characteristics are moderation, faith, and value-based self-conduct rooted in Christianity,

ecumenism, active networking, information sharing, and the building of social capital. They work towards self-sustainability and independence from any system that currently dominates, a sort of intellectual resistance through action. Their attitudes are reflected through self, family, community, village, landscape, ethnic region, and the larger, fragmented Hungarian nation. They also connect to the wider European community through shared interests and their past or present exchange of knowledge. They feel at one with the landscape, and their work is rooted in preserving and conserving the cultural heritage of that landscape, while working with contemporary means of technology.

Heirloomers: As with intellectual peasants, heirloomers have some experience working the land in a family setting. What sets them apart from intellectual peasants is that they are working in some creative, innovative setting, and do not live off the land like peasants would do by raising cattle and growing crops. Heirloomers do small scale gardening or farming. They engage in activities that restores and preserves the tradition, or through activities that provide some similar “heirloom” nature of their work. Examples might include preserving seed banks or horsing traditions. There are two major types of heirloomers: people who do not live off any EU or state funds and grants, and those who use EU and state funds to some extent.

Locally rooted mid and “big” scale farmers: These include a wider variety of people who work with current EU subsidies and grant systems to farm, rent, or start a business by utilizing such funds. They might initiate a new way of making an income, and while they work for the community and can be intellectual, they are less focused on faith, landscape, and sustainability than heritage heirloomers and intellectual peasants. The three are quite distinct categories. However, they are all locally rooted, can engage, and fuel community events, so they are rooted. Three groups emerged with limited insights into them: floaters, necessity farmers and hoarders/for profit agribusiness farmers. The three groups are perceived personality types and behavioral adaptations to opportunities and challenges of the changed and changing social-economic landscape of the region. Due to the scope of the study, we are able only point toward these groups and seek more understanding about each in future studies.

Floaters: Primarily individuals from the younger generation (18+), who engage in seasonal employment and are affiliated with a village through land ownership. Their connection to the land or the village is primarily mediated by friends and family. However, they do not cultivate the land themselves, and their social ties to the village through friends and family remain weak.

Necessity farmers: These are farmers who were raised in the agrarian system, many of whom felt there was no other choice in life than to farm with the means they received and learned from their parents, or by the means the state tries to help. They are often locked in poverty and into routine.

Hoarders/For-profit agribusiness farmers: These farmers are only in agriculture for profit. Their actions are exploitative and utilitarian. Their investment in the landscape is minimal, lasting only as long as the profits and/or subsidies last.

Pathway to adaptation

It was perceived among the interviewees that heirloomers and intellectual peasants make up the needed critical minority who can set a direction to move forward the “canned culture”. The “canned culture” was articulated by respondent #14, as most of the current Székely–Hungarian culture living off of the past, and mostly “exhibited” [e.g., theatrical plays, dances, festivals], rather than lived daily. In order to reimagine the ancestors’ culture and apply it and extend it in contemporary terms to agriculture remains very important. This reimagining includes integration of physical artifacts such as barns, haystacks, vernacular architecture, the Székely gate, and the peasants’ house. As one of the intellectual peasant respondents expressed, past peasant society produced the culture that is only exhibited today, and the true peasant society has disappeared.

Working the land and living off of the land is tied closely with culture, and as respondent #14 captured it, it is an intellectual task, that was reinforced by #16. The importance of learning, and self-education as part of farming, working the land was reinforced by #2, 5, 9, 19, 21a, 21b, 29, 31, 32a, 32b. The close relationship between culture and agriculture was explained by respondent #14, and being a peasant in the 21st century is an “*intellectual task*” because the rebuilding of the “*peasant society*” agriculture’s “*culture-creating*” role is needed. Along with culture, an inner spirit and character emerges. This is tied to one’s soul. It resembles a holistic care and appreciation-based approach to family, community, village, and landscape. These include respecting the carrying capacity of the native habitats, ecosystems, biodiversity, and loving care of animals were explained. In this setting, children have a vital role in the family. Interviewees say that current trends in bringing up children are overprotective. This was succinctly put as “*for the sake of responsibility [you] take away responsibility*” (#9) from children. Instead, they follow a practice of preparing children to be self-dependent, and “*fit for life*”. It was articulated that these children would be more resilient and learn to be responsible for their actions. An example would be providing children with tasks such as feeding animals and milking cows. Daily chores, or routinely assigned tasks, where the child will learn the importance and consequences of not performing an assigned task (i.e., an unfed animal dies). This approach was believed to be crucial to bringing up responsible generations.

A new, alternative system to take the place of the current corrupt one was articulated. This system links daily actions to a sustainable future, connects local scale to global, and links farming with the desired attitude (i.e., seven virtues) to achieve a desired state of self-sustainability. Transformation of the cultural landscape is rapid, and heirloomers and intellectual peasants both expressed that the current time is crucial for avoiding the bad examples of the West. It was said that one needs to “*live in the landscape*” rather than off it. Reasoning and decision-making vary depending on whether one views living with the system or off the system as an intellectual resistance. However, heirloomers and intellectual peasants do converge on the idea that one should farm out of love, not because there is an opportunity for a grant.

The six personality types, as adaptation strategies, can point towards a mechanism of local adaptation. Heirloomers, intellectual peasants, and locally rooted farmers, who actively engage with the land, move communities forward toward a desired local self-sustainability. One of the respondents (#9, see Table 1) expressed it, and respondents reiterated, that the Székely community, the Székely village, and landscape are one, and should not be separated, and it will not “work,” by taking out one of the elements: “I don’t think this can be separated, land, community, village; they can’t be separated [...] It’s a block, as it is, so good. I take out any of them then it no longer works” (# 9).

Family is especially important for heirloomers, intellectual peasants, and for locally rooted farmers. Family provides strength for moving along the path towards local self-sustainability, where members of the family, from children to adults, have a role in working and taking care of the land, business, or making of a product. Parents educate and teach their children about small-scale living or might have been greatly influenced by a family member. It was articulated by heirloomers, and intellectual peasants that an ecologically sound local and ethnoregional economy is needed that considers the ecology of the region, and builds a positive sense of pride for those who do agriculture, as currently, it lacks such. For example, respondent #17 expressed the value of agriculture in an ethnoregional context. In Székelyland farming can be perceived as a burden, rather as a source of pride. The interviewee compared Székelys to Romanians with whom she experienced the opposite.

Intellectual peasants and heirloomers use different tools but work toward the same goal of building capacity and relationships. They self-organize to promote the region’s self-sustainability. The spectrum ranges from total detachment from or minimal attachment to current institutional frameworks. Some may completely reject subsidies and will not participate in grants, while others, as civic actors, work with the system, bringing in EU or other funds to promote sustainability and build knowledge. Their involvement in day-to-day farming is frequently minimal, but they also belong to the heirloomer category. In the case of two interviewees, intellectual peasants had been engaged in formal civic or state-level jobs, and their experiences led to a shift in their perspectives. Both groups agreed that the current subsidies and grants have created an artificial environment that threatens the region’s famed biodiversity and overall ecology.

Necessity farmers are locked into the system, have no power, and means to escape and are perceived as an important group who still keep traditions by necessity, and not by choice.

Floater were perceived as cargo on village, community, and landscape. Their ties to the land through ownership and livelihood have eroded over time and reflect generational differences. Floaters avoid the cumbersome way of living and rather move to cities or maintain a family property in the village for housing purposes while they frequently work abroad. Floaters were mentioned as unable to fit into the local community, and who have little or no interest in building communities or investing in their local community. They can be represented as a group of high school graduates who go abroad to work in fruit, and vegetable picking industries, farming and in construction. Many may have higher degrees acquired in Romania, but utilize their knowledge abroad, or never work within their chosen disciplines. Their assignment as “floaters” represents the view of the heirloomers, intellectual peasants

and locally rooted farmers. “Floating” was also articulated as a trend with positive aspects, because people have incomes that can be used to build a house or buy a tractor back in their homeland. One interviewee (#14) stated, “*engineers, forest engineers and all kinds [of higher educated individuals],*” say that “*they only work for two or three years, collect money to come home, invest at home and start a business.*” Another positive aspect of the floater phenomenon mentioned was how it can facilitate escape or rise from poverty. It “*makes sense*” considering that in just a few months (3–4) one can earn as much abroad as one year in Romania (#7, 28).

However, despite the accumulation of income, reintegration is not easy. People working abroad keep extending the years before they return home, and while at home they might invest the money, these are “*prestige investments,*” (e.g., a big, fast car, a house that is too big to keep up). Thus, the “*transition period [between accumulating/earning money to return] slowly gets extended*” and they can “*lose their roots*” during this process (#14). Their subsequent increase in age affects considerations for starting or building a family. For example, floating was described for people who work abroad and only visit their family for a short period of time. These individuals may become disconnected from their roots and upon their return, they lack support through friends and family. The possibility for them to be entrepreneurs with an accumulated capital is questioned as they perceived to have insufficient knowledge of local economic and legal expectations. He explained these points as:

He [in general] is already 35–40 years old and they still have nothing in their hands so they lose their roots and when he would come home at the age of 50 to start something then-then on the one hand nobody standing behind him, a partner, a group of friends, a social stratum. He no longer knows the legal order and economic order here; he has no network capital (#14).

The same interviewee, while not quoted, mentioned that the same individuals lack the “leadership” qualities required for running a business, start-up, or lead local innovation. They might have acquired some knowledge by working abroad but lack the experience to build upon it. The interviewee spent about three decades working with local community development programs. In contrast, a heirloom couple (#32a, b) and a locally rooted married couple (#21a, b) built upon their experience acquired from working abroad.

The findings of this study reinforce the findings of previous studies of the region’s such as rural societies as social-ecological systems (Hartel et al., 2016). The corrupt and uncertain political landscape were described by others and a detailed discussion will not be provided (see Cartwright, 2001); and the hectic land reinstitution process was documented by Verdery (2003). Beyond this, the current study has provided new and novel insights revealing that, in the rapidly changing rural cultural landscape, villages and their communities seek to adapt to change. The process is occurring in a “twilight” period (Hartel et al., 2016, p. 9), implying a state of ambiguity and/or decline, within which individuals and their families are adapting in response to substantial and rapid change. The study does not claim that it captured the adaptation process of rural communities in a post-communist context. However, it captured an ethnic group’s “space and place” bounded adaptation process. It is not the only process likely. However, within the studied space and place, an “act locally, and think

globally” process is enacted, “*and theories are tested in practice*” (#14). It is, in this sense, an evolving pragmatic landscape.

The 163 converging and diverging themes gets translated through the six key personalities so we may understand an unfolding “act local, think global” pragmatic landscape. The broad research question asked about decisions of individuals, their family members, or members of communities. People elaborated in detail the reasons why certain decisions were made, and how those influence the community, village, and the landscape.

A sense-making, or a “meaning-making” (after Park, 2010) narrative was a frequent way to express personal decisions. This could include how one responded to change, description of the resources that were at one’s disposal, resources that were missing (e.g., a wife’s support, the knowledge of the father, and his support, #31, or even the spiritual support of the landscape #14, 16, 19; etc.). The articulation of the importance of the seven virtues, the support of family members, local priests, and the work of the civic activity indicate the importance of the availability of a support system that are external to the individual (e.g., environment) and internal (mental, spiritual). The human developmental literature would capture these element as “individual resilience,” (Liebenberg et al., 2017, p. 4) “individual agency” (p. 42), “psychosocial functioning” (World Health Organization Regional Office for Europe, 2009, p. 13).

Pathways to adaptation through the lens of individual resilience

The discussion of the findings of the social reality articulated by the interviewees considers human development literature on individual resilience. The definition of individual resilience by Liebenberg and her colleagues (2017) is “...a developmental process, resilience primarily involves the agency, or inner capability of individuals of all ages, to call on their internal strengths, engage with others and look for external resources to successfully transform stressful situations or adversity into opportunities to learn and thrive” (p. 4).

Research indicates that psychological wellbeing and the availability of psychosocial sources for individuals are important for handling stressful events and situations to endure and cope with change (World Health Organization Regional Office for Europe, 2009, 2015; Liebenberg et al., 2017; Masten, 2001, 2016), such as rural outmigration. Individual resilience depends on the capacity to harness psychosocial resources (Liebenberg et al., 2017), and the “Determination, Endurance, Adaptability, and Recuperability” of the individual (Taormina 2015, p. 36). Individual resilience considers the life course development of individuals to promote population mental health and wellbeing in various cultural contexts (Liebenberg et al., 2017).

Individuals make sense of everyday life changes and their response depends on both internal and external resources and assets (Liebenberg et al., 2017). Agency is a key individual asset that includes individuals’ “meaning-making frameworks and meaning-making processes as well as the capacity to decide and act in a given environment” (Liebenberg et al., 201, p. 6). The capacity to act

is complimented with Taormina's (2015) definition of personal resilience and agency as a "... person's determination and ability to endure, adapt, and recover from adversity" (DEAR) (p. 36). Meaning making frameworks (frames of reference) can be developed both individually and collectively, especially where the community has experienced a stressor (Liebenberg et al., 2017, Park, 2010). It can also be carried out across generations. Liebenberg et al. (2017), based on their synthesis of the individual resilience literature describe three elements of individual resilience: "*individual assets*" (intelligence, spirituality, meaning making processes, sense of humor etc.) (p. 18), "*contextual resources*" (education, recreation, civic and religious engagement, community cohesion etc.) (p. 21) and "*relational resources*" (extended family, relationships with parents, friends, stable and accepting relationships) (p. 19). The "mutually agreeing" consensual nature of these relations is expressed by Liebenberg et al. (2017) as necessary for human wellbeing.

These elements are well reflected in the way interviewees explained their engagement with land, family, self, and community in an everchanging, and unsustainable climate of environment and institutions. The definitions of intellectual peasants, heirloomers, and locally rooted farmers (necessity, and large scale) showcase a quality of "calling on internal strengths," or "harnessing" sources and transforming them to resources in a stressful environment where psychosocial functioning was challenging. Across scale, place, and time, individuals made sense of their life events in relation to self, personal capacity, psychosocial climates, family, community, and institutions.

Villagers and/or landowners in Romania went through stressful events that affected individuals' global beliefs. For example, interviewees expressed that, in response to lack of economic opportunity, many family members emigrated to take on seasonal jobs abroad that led to depopulation of villages. The reinstitution of confiscated land was a chaotic process that caused significant stress between 1990 and 2000 at the personal and the village levels (Verdery 2002, 2003, Cartwright, 2001). The land reinstitution stressor called for village residents to exercise rapid decision-making and required its own adaptation process. In general terms, individuals found it necessary to reposition themselves from a communist collective behavior to behaviors that are more aligned with a free market driven democratic country.

The Székely–Hungarian ethnic minority group continues to struggle with the remnants of several institutional systems, while simultaneously adjusting to pressures of assimilation, globalization, depopulation, and natural resource depletion. Many of these groups eagerly anticipate economic growth and modernization. Others focus on avoiding the failures of the West. The latter tend to resist unsustainable practices promoted by old economic models of constant economic growth. They seek to change the region's cultural-economic development by enacting ideals espoused in the circular economy model instead. Therefore, they live on a smaller scale and tend to remain rooted in ethnoregional sustainability (similar to bioregionalism, but ethnic block is emphasized). In given answers a personal determination narrative, of will and experience, is emergent. Individual and collective meaning making frameworks serve as the pathways to overcome adversity and stressors in this cultural landscape.

CONCLUSIONS

This study adopted an interpretive-social constructivist approach to understand why villages and their landscapes are rapidly declining. It captured a locally voiced social reality, explained through the decision-making of individuals, their families, and their village communities. Locals explained that a massive seasonal loss of labor has driven rural change for the worse, resulting in abandoned land and communities. Self-organized, loosely, or more firmly knit local characters—whom we captured as intellectual peasants, heirloomers, and locally rooted farmers—drive local change.

The rural landscape and the society are fragmented in the Székely ethnoregion, where the common Hungarian language, ethnic-cultural ties, religious affiliations, and the ancestral land binds the community together. It is feared that the institutional-economic landscape created through the Rural Development Program’s subsidies and grants will destroy the remaining beauty and diversity of one of the most culturally and biologically diverse landscapes. Intellectual peasants, heirloomers, and locally rooted farmers work toward an ecologically sound cultural landscape, small scale living and/or responsible farming. Rural decline is not occurring at the same pace everywhere. This study indicates that local level adaptations are diverse, and many adaptation processes remain unknown. Grants and subsidies, while not favored by everyone, remain important sources of support for farming. The community bidding role of priests, and teachers was expressed as a desired component of villages, next to a family oriented rural society.

Individuals, such as the ones interviewed, seem to push forward to achieve local sustainability that is integrated into global perspectives of climate adaptation and circular economy, among others. This study shows that more studies need to adopt a human development perspective to study rural change. More attention needs to be given to understanding individual (actor) level sense making pathways through the entire life course of individuals. Individuals make sense of their life events that often are chronic, reappearing, rather than acute. The sustainability of cultural landscapes depends on small sustenance farms, and their farmers. Adopting a human developmental perspective allows seeing individuals along a continuum, where the evolution of self is not fixed.

The group of floaters needs to be studied more thoroughly. This includes understanding their drives and aspirations, their meaning-making pathways, and individual resilience to change, all of which require more attention. The limitations of this study lie in the fact that it only provides perspectives on social reality through the eyes of heirloomers, intellectual peasants, and locally rooted farmers. At the time of the interview, many „floaters” were abroad, performing seasonal jobs. However, the study did incorporate the perspectives of two young couples (21a, 21b, and 32a, 32b). After returning from abroad, they began farming and engaging in small-scale sustenance gardening and farming.

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APPENDIX A

Probed Convergent Interview (CI) themes

The following tables consist of the 163 themes that emerged during convergent interviews and were probed for agreements and disagreements between interview pairs and the emerging narrative. Themes were grouped into broad “first order” categories of L=landscape, VC=village community, I=individual, F=Family, FM=Farming, O=Other. The first order themes were further categorized into “second” order categories based on their specific attributes and/or their “multidimensional” meaning considering the contexts they were discussed. The 2nd order categories are FM=Farming, INC=Income, IA=Individual Assets, VC=Village Community; SWMOB=Seasonal Work Mobility, LM=Land Management, F=Farming O=Other, EDU=Education, Knowledge, Upbringing, EMPL=Employment, ABR=Abroad, O=Other, OTL=Outlook (future, do business), INV=Investment, Lead=Leadership, ETH=Ethnicity, INC=Income, PROF=Profitability, CUL=Culture, COMM ELEM=Elements of community; Variability, F=Family.

A-1 CI themes – Individual and family

#	Probed Themes	First order themes	Second order themes
1	People emigrate	I	O
2	Education is important	I	EDU
3	Exchange of experiences is important	I	EDU
4	Knowledge gap, break in the knowledge	I	EDU
5	Useless/valueless diplomas/certificate	I	EDU
6	No high school graduation exam	I	EDU
7	Earns capital abroad [villagers working abroad]	I	FM, INC
8	Invests the money earned abroad	I	FM, INC
9	Working capital	I	FM, INC
10	People go away to feel better financially, emotionally	I	IA, SWMOB
11	Farmers help each other	I,	VC
12	Whoever goes abroad escapes	I	O
13	Internet, smartphone’s negative influence on children	I	O
14	In villages the land is given for building a house; people stay [in villages] to build	I	O
15	The world collapses around them [those who are abroad]	I	SWMOB, O
16	For those who go abroad the world is ahead of them	I	SWMOB, O
17	The importance of mentality/the way one thinks	I	IA
18	Endurance, insistence, perseverance	I	IA
19	Belief, hope (opinion, importance)	I	IA
20	[Székelys] do not relax	I	IA

A-1 CI themes – Individual and family (continued)

	Probed Themes	First order themes	Second order themes
21	People [Székelys] are materialistic they do not look after themselves and they only stop if there is a problem (or during wintertime)	I	IA
22	People do not relax and then think, [a] difference between village and city	I	IA
23	People are negative, positive thinking would be needed	I	IA
24	There is a lot of people who drink at home alone	I	IA
25	People do not even think that the soul's problems are important, mental “things” are important	I	IA
26	Desertification of the soul	I	IA
27	Do not look at the negatives [comes intuitively, being positive]	I	IA
28	There is a problem with self-identity [of people]	I	IA
29	Székelys are envious of each other	I	IA, O
30	Whoever goes away will stand on his feet	I	IA, SWMOB
31	Whoever goes abroad should have a “sense of self” [know oneself]	I	IA, SWMOB
32	Whoever wants to leave will leave	I	IA, SWMOB
33	Székelys can work a lot but cannot relax	I	IA
34	Only a few people self-educate themselves (not just farming, in general)	I	EDU
35	Current liberal upbringing of children results in children who are “nonviable” [do not cope with difficulties, too laid back, not working, irresponsible, not aligned with the reality and hardship of life, spoiled]	I	EDU
36	Who am I? Self-identity and self-consciousness' role for young people	I	IA
37	One can get lost if he does not try to step out of his [bad] circumstances and bleakness [appeared as a choice to go abroad]	I	IA, CR, RR
38	There is too much stress, people cannot stop [do not know how]	I	IA
39	Stress level should be recognized	I	IA
40	It is taboo to speak about spiritual/soul problems openly to strangers [including doctors]	I	IA
41	The soul and the body are separated [in medicine, day-to-day living]	I	IA, O
42	People are “hoarding” that is a problem	I	IA, O
43	Teenagers are like zombies	I	IA, O
44	The world dictates the self-image, self-identity	I	IA, O
45	Mental hygiene - ,soul health' is an artificial concept, it is good for those who do not know himself, does not know his consciousness, not aware of himself	I	IA, O
46	There is a lot of people who suffer from anxiety, who are alcoholics in villages, family problems [are an issue]	I	IA, O
47	People who go abroad can become lonely, use drugs, develop alcoholism, the family collapses [home and/or abroad]	I	IA, SWMOB
48	People want to avoid compromise (i.e., to be part of corruption) and it makes them to go abroad, bleakness at home [social, political] and become sick of it/feds up	I	IA, SWMOB
49	There is a health risk for those who do not go away [abroad] because they can become depressed because there is no work in [villages]	I	IA, SWMOB
50	Whoever stays at home does not take responsibility from a perspective that if he does not get his place at home, but tries it abroad it is not irresponsible because he learns to work abroad, learns responsibility, responsible with himself and tries to step out of his current situation	I	IA, SWMOB
51	It is good if he goes away, it is a good decision, there is no work locally in villages, one can get lost	I	IA, SWMOB
52	Many young people's souls are abroad already	I	IA, SWMOB
53	There is a difference among those who go abroad and those who remain	I	IA, SWMOB

A-1 CI themes – Individual and family (continued)

#	Probed Themes	First order themes	Second order themes
54	The person who goes abroad and is/were unable to stand on his feet at home, will not be able to stand on his feet abroad	I	IA, SWMOB
55	Expectancy of instant, immediate income, profit, or results	I	O
56	Mentality change needed of looking at “what are you doing well rather what are you doing wrong”	I	O
57	[Only] a little attention [given to others] is needed because it recharges people, and gives strength	I	O
58	Isolated people get lost	I	IA, O
59	One should live in a village if [he is already] happy	I, VC	O
60	Buildings are reflecting depression, inner „soul-world”	I, O	O
61	Slave to the land	I, FM	INC, LM, PROF
62	The model of family: women’s and men’s traditional role	F	F
63	If the family decides what direction wants to go, then they will go that way	F	F
64	Family suffers because of its members who work abroad	F	F, SWMOB
65	Only mothers remain in the village because the young are abroad, husbands/fathers are abroad	F	F, SWMOB
66	The importance of upbringing in families	F	EDU, F
67	People take their children from villages to the city because there is “romanization” in villages [schools are weaker and education is weak, because there are many Roma children who had less resources from birth to progress, and due to cultural differences]	F, VC	O
68	Mental hygiene approach and its distribution in villages to help families, to prevent the problems/sickness of the soul, helps with raising children, cope with alcoholism (spiritual/soul counseling, lectures, the presence of professionals in villages, stress, relaxation teach for positive thinking)	F, I, VC	F, VC, EDU
69	Upbringing is important	F, I	EDU, F, IA
70	Role playing is important for children	F, I	EDU, IA

A-2 CI themes – Farming

#	Probed Themes	1 st order categories	2 nd order categories
71	Permaculture is the solution, family friendly	F, FM, L	F, LM
72	Selling the produce is very hard	FM	INC, PROF
73	APIA subsidies are important for farmers	FM	INC, PROF
74	Marketing’s importance	FM	INC, PROF
75	Facebook is important for selling and trading	FM	INC, PROF
76	Not ready for market, cannot brake into the market	FM	INC, PROF
77	Subsidies will run out	FM	INC, PROF, LM
78	There is a lot of expectations from small scale farms in the EU	FM	LM, O
79	Cattle that are foreign to the landscape do not manage the weather well	FM	LM, O
80	No labor, hard to find people to do day worth of work	FM	LM, PROF, O
81	The farmer is not a businessman but should be educated	FM	EDU
82	Everybody should take part in work, have a role in families even children	FM	F
83	Recipes (for growth, productivity, smarter farming)	FM	INC, LM, PROF
84	EU grants promote illusionary farming/economy	FM	INC, LM, PROF

A-2 CI themes – Farming (continued)

#	Probed Themes	1 st order categories	2 nd order categories
85	The question is what will happen to the „pumped up” farms after the grants/subsidies [dry up]	FM	INC, LM, PROF
86	Guerrilla gardening [as alternative to conventional farming]	FM	INC, LM, PROF
87	Working in cooperatives (for farming, accessing grants) is hard	FM	INC, LM, PROF
88	Politicians do not want to support Hungarian farmers	FM	INC, LM, PROF, O
89	Cooperatives (for farming, accessing grants) would be good	FM	LM
90	Kitchen garden should be brought back, along with permaculture	FM	LM
91	Farmers are not asked what they want	FM	LM, O
92	Productivity (attitude towards)	FM	IA, PROF
93	Three types of farmers	FM	IA, LM
94	Under responsibility they take away responsibility from children [EU laws and required policies in school and other areas]	FM	EDU, F
95	Do not apply for grants, not even...	FM	IA, INC, LM, PROF
96	Responsible farming	FM	LM
97	Distrust among farmers	FM	O
98	There is a difference between farmer and farmer	FM	FM, IA
99	Those who work have an “orderly” life	FM, O	O
100	European Union subsidies do not promote self-sustainable farms	FM, LC	LM, O
101	Leaders do not have conscience, soul-knowing, which is why we have a problem	FM, L, O	IA, O
102	There is uncertainty because of unclear property titles	FM, L	INC, LM, PROF, O
103	There are too many farms, it is not good for the ecological balance	FM, L	INC, LM, PROF, O
104	Two-three farmers work most of the land in a village (Low number of farmers work the land)	FM, L	LM
105	There is no small scale/sustenance farmer in the village/villages	FM, L	LM, O
106	The small scale/sustenance farmers future is beyond hope, there is no future	FM, L	INC, LM, PROF
107	Animals [for husbandry] have to be placed in the landscape, European Union grants, and subsidies do not do this	FM, L	INC, LM, PROF
108	Giving up land is OK	FM, L	IA, LM, O
109	People in their teens and twenties behave non-responsible towards the community, and working the land/agriculture	FM, I, L, VC	IA, LM
110	Upbringing/Educating “local patriots” [who love and not leave their homeland]	FM, I, L	EDU
111	Building [local, traditional] knowledge into the modern contemporary context	FM, I, L	EDU, LM
112	People are needed who are worthy for the landscape	FM, I, L	IA, LM
113	People became too comfortable	FM, I, L	IA, INC, LM, PROF
114	“Shepherds with jeeps and trucks” care for profit, see animals as a money-making machine; profit-oriented mentality [mentioned using too big trucks too frequently causing habitat loss, and land degradation]	FM, I, L	IA, INC, LM, PROF
115	Healthy balance of man and the land: an inner “program”, soul-knowing/[maybe] conscience, empathy [towards landscape, animals, people]	FM, I, L	IA, INC, LM, PROF
116	Young people do not want to do farming	FM, I, L	INC, LM, PROF
117	We are “here” because of education and upbringing [problems caused by lack of land attachment, not involved in community, not helping each other]	FM, I	EDU

A-2 CI themes – Farming (continued)

	Probed Themes	1st order categories	2nd order categories
118	It started in other people's soul that we do not only talk about problems, but we show alternatives for i.e., farming, growing plants	FM, I	EDU, IA, INC, LM, PROF
119	Envy and the obstruction of each other, and not helping of each other shows a capitalist, businesslike/entrepreneur mentality	FM, I	IA, INC, LM, PROF
120	The working of the land (agricultural jobs) is carried out stressfully, they release tension in alcohol, people are grumpy, moderation/calmness needed [to work the land]	FM, I	IA, LM
121	There is a conscious generation in their 30's, who do not want to farm stubbornly and stressfully	FM, I	IA, LM, O
122	The current reality is that it is important who knows who, and where, e.g., farmers cheat each other through a network of acquaintances, try to buy land cheaply	FM, I	IA, INC, LM, PROF

A-3 CI themes - Village community, landscape, other

#	Probed Themes	1st order categories	2nd order categories
123	Community events are important	VC	COMM ELEM
124	There is a difference between village and village	VC	Variability
125	There is youth in the village	VC	COMM ELEM
126	Cohesion or togetherness is important for a good community	VC	COMM ELEM
127	Priests and teachers are very important for the community	VC	COMM ELEM
128	A leading person is needed for a good community, a main organizer	VC	COMM ELEM
129	Activities performed are contagious [in a village, inspires] shows example	VC	COMM ELEM
130	An individual's success also depends on the community	VC	COMM ELEM
131	The community is envious	VC	COMM ELEM
132	There are no resources on the level of village-communities	VC	COMM ELEM
133	Work together, and celebrate together	VC	COMM ELEM
134	The importance of a handful of people in a community	VC	COMM ELEM
135	There is cohesion in the village community	VC	COMM ELEM
136	Importance of community spirit	VC	COMM ELEM
137	Little things that make a community good and strong	VC	COMM ELEM
138	The realities [social, economic] differ by village	VC	Variability
139	There is no "uniformity" among people, everyone is different	VC	Variability
140	A layered [wealth, status, professional] local village community	VC	Variability
141	Cultural belonging, heritage, and religion are important for community, and feeling belonging, unity	VC	ETH, VC
142	Consolidation of land	L	LM
143	Grants/subsidies shaped landscape	L	LM
144	One must live in the landscape does not work it [till it up entirely, etc.]	L	LM
145	The village is declining	L, VC	LM, VC
146	Land, community, and the village cannot be separated	L, VC	LM, VC
147	They still the forest away	L, O	IA, LM
148	Open and liberal thinking and its consequences	O	CULT, EDU
149	Do not know what it will be like in 20 years	O	CULT, EMPL, INC, OTL, PROF

A-3 CI themes - Village community, landscape, other (continued)

#	Probed Themes	1 st order categories	2 nd order categories
150	There are no alternatives [for doing things]	O	INC, OTL, PROF
151	EU grants for village tourism	O	INC, PROF
152	Little kings "outgrew" themselves	O	INC, PROF
153	Micro-loans are a good solution for buying homes if they do it smart	O	INV
154	Leading figures need to be trustworthy/authentic	O	LEAD
155	Good communities get formed abroad [from those who leave to live/work abroad]	O	ABR, EMPL
156	New copy-paste culture needed	O	CULT
157	Herd mentality	O	CULT, EDU
158	Professional knowledge is outdated	O	EDU
159	There are no wise people	O	EDU
160	There is agreement between Romanian and Hungarian people/farmers.	O	ETH
161	Alcoholism [in villages]	O	O, OTL, INC, EMPL, COMM ELEM
162	Gates should be open [for people, including young people, to go abroad, try out various things in life]	O	ABR, EMPL
163	Abroad the employer respects the employee	O	ABR, EMPL

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Analysis of City Brand and Image From Local Residents' Perspective: A Case Study of Mórahalom

ABSTRACT

Contemporary city branding research increasingly focuses on developing and managing unique place identities, with local residents playing a crucial role not only as a target audience but also as active shapers and ambassadors of the brand. The involvement and opinions of residents are vital for the authenticity and sustainability of city brands, as they are the daily participants and builders of the city's identity. This research examines the city brand and image of Mórahalom from the perspective of local residents and stakeholders. The primary aim of the study is to present a methodological approach that provides guidance on effectively examining the city image and branding of a small town like Mórahalom. Furthermore, it seeks to explore how the local population evaluates the city's brand and what factors influence their perception of the city through a case study of Mórahalom. Using a mixed-method approach, we conducted an online survey among local residents and semi-structured interviews with city leadership members. The findings indicate that residents generally have a positive attitude toward Mórahalom and take pride in its development, although the city brand requires improvement in diversifying tourism offerings and engaging young people. The research highlights that involving residents in creating and developing the city brand is crucial for its success and sustainability.

Keywords: city brand, image, local residents, participation, branding

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INTRODUCTION

The emergence of city branding has led to the treatment and marketing of cities as products, introducing a new methodology into the marketing world. A municipality's offerings encompass various specific products, services, and values, creating a diverse repertoire that meets the unique needs of customers and target groups (Piskóti, 2016). In today's world, the endless array of slogans and logos may no longer be considered novel.

In Hungary, particularly in the Southern Great Plain region, city branding is not yet as widespread as one might assume, but the number of municipalities adopting it is steadily increasing. Mórahalom is no exception; in fact, its city brand and image play a crucial role in shaping perceptions among both the local community and external stakeholders.

This paper explores the characteristics of Mórahalom's city brand and image and examines how these features align with the opinions of its residents. Analyzing the concepts of city brand and image will reveal key elements that define Mórahalom's identity and reputation, including its tourist attractions, cultural heritage, natural assets, and the values and attitudes of its inhabitants.

In conducting this research, it is essential to consider the local population's opinions, attitudes, and satisfaction with the city, as they are the ones who actively contribute to and shape Mórahalom on a daily basis. The aim of this article is to provide a comprehensive overview of Mórahalom's city brand and image from the perspective of its residents. The results and conclusions drawn from this research may have significant implications for shaping the city's future strategy and strengthening its brand.

LITERATURE REVIEW

Historical background of city branding

The philosophical foundation for perceiving our environment—including city branding—can be traced back to the 17th century when philosophers like Descartes examined the nature of perception. According to Descartes, thoughts can objectively represent reality, laying the groundwork for concepts of identity and image, which later became essential elements of city brands (Govers & Go, 2009).

City marketing began in the early 1900s as a **rudimentary** form of place promotion, characterized by short, one-time campaigns (Papp-Váry et al., 2022). Over time, cities increasingly recognized the need for image building and adaptation to market competition to retain skilled workers and attract tourists and investors. American and European city marketing evolved along different trajectories: in the USA, the primary goal was to secure financial resources, while in Europe, enhancing social welfare was also a key objective (Piskóti, 2023). The evolution of city marketing reflects a shift from simple promotional activities to a more complex approach that acknowledges the multifaceted nature of urban environments. This transition underscores the growing recognition of cities as dynamic entities

with distinct identities and the need for strategic branding to remain competitive in an increasingly globalized world.

There is no universal consensus regarding the definitions of city marketing, city branding, and city brand, making it worthwhile to examine their conceptual foundations. According to Kotler: “Marketing is a social and managerial process by which individuals and groups create and exchange products and values to satisfy their needs” (Piskóti, 2016). The American Marketing Association defines marketing as “the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational goals” (Piskóti, 2016).

Place marketing, place branding, and place promotion are interconnected yet distinct components of marketing strategies aimed at enhancing the appeal of a geographical location. Place marketing focuses on balancing supply and demand, ensuring that a place’s offerings align with the needs of its target groups (Boisen et al., 2018). In contrast, place branding is concerned with creating and managing a favorable identity for a location, often through strategic narratives that highlight its unique characteristics (Hanna & Rowley, 2020; Jacobsen, 2009). This process goes beyond external image-building by also addressing internal perceptions and fostering active involvement from residents and stakeholders (Braun et al., 2013).

Place promotion, however, primarily aims to generate favorable communication and visibility for a location, often through campaigns that emphasize its appeal and benefits (Boisen et al., 2018; Skinner, 2010). While promotion functions as a tactical component within broader marketing and branding strategies, it plays a crucial role in capturing the attention of potential visitors or investors (Schöllmann et al., 2000). Thus, although all three concepts seek to enhance a place’s attractiveness, they operate at different levels and pursue distinct objectives, collectively contributing to the comprehensive management of a location.

The scientific study of city branding began in 1987, gaining significant momentum in the 2010s (Duque Oliva et al., 2022). An evolutionary model of city branding suggests that the process has developed through five distinct stages: primitive, boosterism, entrepreneurial, formalized, and brand-focused (Green et al., 2016). Before the 19th century, city promotion relied on simple advertisements, but from the late 19th century onwards, the focus shifted to attracting labor to newly emerging industrial areas. By this time, it was becoming evident that a positive perception of a city could facilitate its leadership and development. The entrepreneurial approach became prominent in the 1980s, and with the rise of Web 3.0, communication channels gained even greater significance (Govers & Go, 2009). During the formalized stage (extending roughly until the 2000s), stakeholders played an increasingly vital role, and promotion became a key aspect of city branding. In the final, brand-focused stage, branding and brand management tools were systematically applied (Green et al., 2016). These developments provide the foundation for understanding current trends and approaches in city branding.

Main approaches in place marketing and place branding today

In place marketing, two major challenges arise: the complexity and intricacy of places compared to traditional products and the fact that services, rather than property rights, are sold (Ashworth & Voogd, 1997). According to Piskóti, the market, buyers, and sellers of places can be clearly defined, allowing for the adaptation of fundamental marketing principles. However, the classic 4Ps of marketing are not entirely applicable; instead, he proposes the so-called 2C solution, which focuses on the supply and communication aspects of places and is more interpretable than the 4Ps (Piskóti, 2016). Effective place marketing necessitates internal development, including infrastructure improvements, urban design, and investments, which collectively serve as the foundation for a functioning place brand (Kraftné Somogyi et al., 1998). The city image is one of the most significant and visible components of city branding, capable of independently communicating and positioning a settlement. This image comprises not only a logo and typography but also all content and visual elements that identify and differentiate the city from its competitors (Jenes, 2022). Therefore, effective place marketing is not possible without proper place branding, and successful place branding requires the strategic application of marketing tools.

City branding differentiates products and services through the benefits and added value they offer to customers (Papp-Váry et al., 2022). According to Kotler, a city brand not only attracts investors and tourists but also strengthens local identity (Kavaratzis, 2004). Local residents play a crucial role in brand development, as demonstrated in the Be Berlin campaign, where personal stories were integral to its success (Braun et al., 2013). Branding is a long-term process that creates a comprehensive identity, whereas marketing focuses on specific target groups through medium- or short-term campaigns (Papp-Váry et al., 2022).

Settlements have always competed for resources, and this competition continues today, particularly in attracting target groups and stakeholders. Entrepreneurs' location choices are increasingly influenced by geographical, communication, and technological mobility. Beyond traditional approaches, creative solutions are required for a city to successfully market itself as a destination. Marketing plays a crucial role because where buyers appear, competitors emerge, creating a distinct "market space" where marketing facilitates effective communication and service promotion (Kavaratzis, 2005; Ashworth & Kavaratzis, 2009).

The popularity of green and eco-tourism has grown, particularly due to the impact of COVID-19 (Kiss et al., 2025). Sustainability is an increasing priority not only in tourism (Gonda & Rátz, 2024) but also in place branding (Kavaratzis, 2016), as both demand and supply sides strive to reduce their ecological footprint (Szeberényi et al., 2017). Cities that cater to these demands can gain a competitive advantage through initiatives such as the Green Hotel award established by the Hungarian Hotel and Restaurant Association, or the European Union's European Green Capital and European Green Leaf programs, which recognize sustainable cities like Valencia (2024) and Ljubljana (2016). However, no Hungarian city has received these accolades yet.

Rural tourism, often positioned as the opposite of urban life, is also linked to green principles. A notable example is Magyarkanizsa, where nature-related elements were emphasized in the city brand development (Bödö & Papp-Váry, 2021). However, overtourism can lead to conflicts between locals and tourists, as seen in Barcelona, where local interests are overshadowed, ultimately damaging the city's image (Ásványi, 2022). Tourism-oriented settlement marketing and destination branding are distinct aspects of settlement branding, each characterized by its own interest groups and processes. The nature of tourism products is tied to specific locations and time periods (Gonda, 2014; Horváth et al., 2016; Rogerson & Rogerson, 2024). Therefore, involving residents and stakeholders is crucial to maintaining an authentic and sustainable city brand.

Target groups in city branding

When developing a city brand, it is essential to thoroughly understand the settlement's environment and network of relationships, making the involvement of stakeholders and target groups crucial. Stakeholders are identifiable groups or individuals who can influence the organization's goals or are themselves affected by these goals (Piskóti, 2016). They can be divided into internal and external groups. Internal stakeholders include local governments, tourism destination management organizations, and local residents, while external stakeholders consist of consumers, tourists, and competitors. A good example of involving target groups is Magyarkanizsa, where focus group research was conducted to assess stakeholders' future brand needs (Bödö & Papp-Váry, 2021).

Several studies highlight the significance of local residents as key stakeholders and emphasize the importance of ensuring their participation (Braun et al., 2013; Zenker & Erfgen, 2014; Maheshwari et al., 2014; Zhao et al., 2022). They play a vital role in the successful branding of a destination or settlement and should be actively involved in the process. Factors such as residents' local identity, their identification with the brand, their commitment to it, and their perception of tourism-related benefits all positively influence their attitudes and attachment to the settlement (Zhao et al., 2022). Considering the interests of local communities is essential for the success of regional tourism development projects. To this end, it is advisable for municipalities and small regions to conduct a situation analysis to obtain a realistic picture of the current state and incorporate the findings into development strategies (Lőrincz, 2008).

Stakeholders are often classified based on their interests and power dependencies. For example, the National Tax and Customs Administration is considered a key interest group. In the case of Magyarkanizsa, three primary stakeholder groups were identified: local community leaders, tourism sector representatives, and civil organizations and citizens. Involving the local population is also of paramount importance in line with the principle of subsidiarity, as they serve as authentic guardians of the city's identity. Another defining element of city branding is the target group, which consists of potential stakeholders for whom the settlement, as a product, may be attractive. By exploring the demand side using market research methods and segmenting the results, appropriate target groups can

be selected, significantly contributing to the brand's success and sustainability. However, incorrect targeting can lead to an unsuccessful campaign (Veres et al., 2017). In conclusion, the careful selection and involvement of stakeholders and target groups play a fundamental role in determining the success of city branding and the positioning of a settlement.

METHODS

Characteristics of the study area

Mórahalom is a dynamically developing small town in Csongrád-Csanád County, just 20 kilometers from Szeged. Situated in the southern part of the Homokhátság region, near the Serbian border, it boasts unique geographical and cultural characteristics. The city has undergone significant transformation in recent decades. Once primarily reliant on agriculture, Mórahalom has now become a key tourism hub in the region. The Szent Erzsébet Mórahalom Thermal Bath plays a central role in this shift, attracting visitors with its high-mineral-content medicinal water and a wide range of wellness services. In addition to the bath, several other attractions await guests (Figure 1), such as the Patkó Equestrian and Open-Air Theater, where visitors can enjoy horse shows and theatrical performances, and the Thousand Years Park, which interactively showcases different eras and architectural styles of Hungarian history. The city also offers numerous opportunities for nature enthusiasts. The Nagyszéksós Lake and its surrounding areas are ideal for hiking and birdwatching, while the Buffalo Reserve provides insight into traditional animal husbandry.

Figure 1. Mórahalom and its main attractions



Source: OSM, Own editing (2024)



The city places great emphasis on sustainable tourism and the preservation of local values. The Homokháti Portéka product trademark guarantees the quality of locally produced goods, while the tourist city card system provides guests with discounts on various services. Thus, Mórahalom successfully combines traditions with the challenges of the modern era. The thermal bath, equestrian theater, historical park, natural attractions, and gastronomy all contribute to making Mórahalom an appealing and experience-rich destination for visitors.

Methods based on primary sources

In the primary research phase, both quantitative and qualitative methods were employed. Our fundamental aim is to demonstrate the potential application of different methodological tools in settlement branding research, involving multiple stakeholder groups. Therefore, the research focused on two key stakeholder groups: a segment of Mórahalom's population and several prominent figures from the city's decision-making circle.

To reach the local population, an online questionnaire was created and completed by 75 residents, slightly more than 1% of the local population. However, our goal is not to provide a detailed account of the population's preferences but rather to highlight that the opinions of local residents—one of the most crucial stakeholder groups in settlement branding—can be understood and incorporated into the branding process using such methodological tools. The questionnaire primarily aimed to assess residents' perceptions of the city brand and their relationship with it, as they are among the most important target groups in city branding. It was distributed via social media platforms, specifically in thematic Mórahalom groups, to effectively reach local residents. While the sampling method was based on easily accessible subjects, the questionnaire aimed to be as focused as possible in engaging the target population.

The first section of the questionnaire gathered respondents' opinions about the city and its brand, examined Mórahalom's key image elements, and explored residents' perspectives on potential tourism developments. In the second section, respondents used a semantic differential scale to rate the city on a scale of 1–5 between relevant pairs of opposites, such as rural–urban or developed–underdeveloped. The questionnaire concluded with demographic questions.

The decision-maker stakeholder group was surveyed through semi-structured expert interviews. Individuals were deliberately selected based on their involvement in or insight into Mórahalom's branding process, ensuring they could provide relevant information for this study. Consequently, the sampling method for the interview phase was not random but rather expert sampling. The interview questions were flexible and personalized accordingly. The extracted information was processed using audio recordings and notes. These recordings facilitated post-processing work, enabling key words to be highlighted, critically important sentences to be summarized, and the three completed interviews to be compared.

The quantitative data collected during the research was processed using Excel and SPSS software. Numerical data was analyzed in Excel, calculating averages and percentages where applicable. For the evaluation of the semantic differential scale, we employed cross-tabulation analysis in SPSS. This comprehensive approach to data analysis allowed us to extract meaningful insights from the survey responses, providing a solid foundation for our findings on Mórahalom's city brand perception.

The questionnaire was structured into three main sections, focusing on general opinions and the image of Mórahalom, the importance of the city brand from the perspective of local residents, and other city-related characteristics. By exploring general opinions and perceptions, we gain insight into how residents view the city and the emotions it evokes. The section on the importance of the city brand examines how crucial residents consider its existence and their thoughts on its current image. This comprehensive approach allows us to analyze the local population's perception of Mórahalom's brand and identity, providing valuable insights into the effectiveness of the city's branding efforts and areas for potential improvement.

The questionnaire was completed by 75 residents of Mórahalom. As shown in Table 1, the majority of respondents fell into the 30–40 (22 people) and 40–50 (22 people) age categories, followed by the over-50 category (17 people). Other age groups were represented in negligible numbers. Regarding gender distribution (Table 1), women made up approximately 78% of the sample, while the remaining 23% consisted of men and individuals who preferred not to answer this question. This skew is due to the characteristics and limitations of the methodology used, as online questionnaires distributed via social media typically overrepresent women.

Given the smaller sample size, we did not conduct separate data analyses based on age groups or gender. In terms of employment status, more than half of the sample consisted of full-time employees, while other groups were significantly less represented. A high number of residents with higher education degrees participated, followed by those with high school diplomas. This may indicate that the settlement is beginning to lose its rural character, with an increasing number of residents holding higher qualifications. However, the sample size does not allow for far-reaching conclusions on this matter. The survey was conducted in January and February 2024.

Table 1. Distribution of respondents by gender and age

	Under 18	18–30	31–50	Above 50	Total
Men	0	3	9	3	15
Women	2	9	33	14	58
Prefer not to answer	0	0	2	0	2
Total	2	12	44	17	75

Forrás: Own editing (2024)

RESULTS

General opinions and image of Mórahalom

In the first part of the questionnaire, respondents were asked an open-ended question about the first thought that comes to mind when thinking of Mórahalom. The participants provided nearly forty different responses, most of which were positive. The most frequently mentioned term was *developing*, cited by 11 respondents (Figure 2). This clearly demonstrates that the city has placed great emphasis on development in recent decades and has successfully implemented various projects through grant funding.

Alongside *developing*, the term *livable* was also prominent, reflecting the increasing number of people from surrounding cities and villages choosing Mórahalom as their residence. Additionally, descriptors such as *quiet*, *friendly*, *peaceful* and *clean* appeared multiple times, suggesting that Mórahalom provides an ideal environment for families and is attractive to those seeking a tranquil and well-maintained setting.

These responses indicate that Mórahalom has successfully cultivated a positive image among its residents, emphasizing its development, livability, and pleasant atmosphere. This perception aligns well with the city's efforts to enhance its appeal and quality of life for both current and potential residents. Notably, the term *jewel box* appeared among the responses, despite being mentioned only three times. This description suggests that Mórahalom is considered unique in the region, with residents taking pride in it and tourists potentially finding it attractive for this reason. Due to its distinctive features, the city stands out among surrounding settlements, further strengthening its positive image.

These factors are important for Mórahalom, especially as environmentally conscious behavior among travelers is gaining significance. A growing proportion of tourists are not only concerned with their own experiences but also seek to minimize the negative environmental impact of their travels (Gonda & Rátz, 2024). It is therefore crucial for a destination to retain its authenticity in order to remain attractive to a wide range of target groups.

Most of the negative descriptors were related to the city's rural and farmstead past, as indicated by responses such as *farmstead*, *dusty hole* and *gossip central*. Some residents still associate the city with a rural and village lifestyle, likely due to the significant portion of the population working or having worked in the agricultural sector.

This mix of responses reflects Mórahalom's transition from a rural settlement to a more developed urban area. While the city has made significant progress in its development, some residents continue to associate it with its agricultural roots. This duality in perception presents both challenges and opportunities for Mórahalom's branding efforts, as it seeks to balance its heritage with its aspirations for growth and modernization.

Figure 2. Word cloud of descriptors associated with Mórahalom



Source: Own editing (2024)

These expressions also carry negative connotations, suggesting underdeveloped infrastructure and a lack of modernization. This is most evident in the city center, where modern buildings blend with older structures such as the so-called *Kádár cubes* and other dated buildings. This phenomenon can lead to inconsistency, potentially creating a negative impression and harming the town's image. Minimizing this disparity and developing high-traffic areas using various urban planning techniques would be beneficial.

An alternative approach could involve preserving the past instead of prioritizing modernization, as demonstrated by the Bivalybowling Club and Bar, where the building's facade was maintained in its original style, preserving its cultural value. This strategy allows for the simultaneous protection of the city's historical and cultural heritage while integrating modern developments.

Striking a balance between past and future could be crucial in enhancing the city's image and evoking positive emotions. This approach would enable Mórahalom to honor its history while embracing progress, potentially resolving the conflicting perceptions among residents and visitors. By carefully managing this balance, the city could create a unique identity that appeals to both those who value its rural roots and those who appreciate its development and modernization efforts.

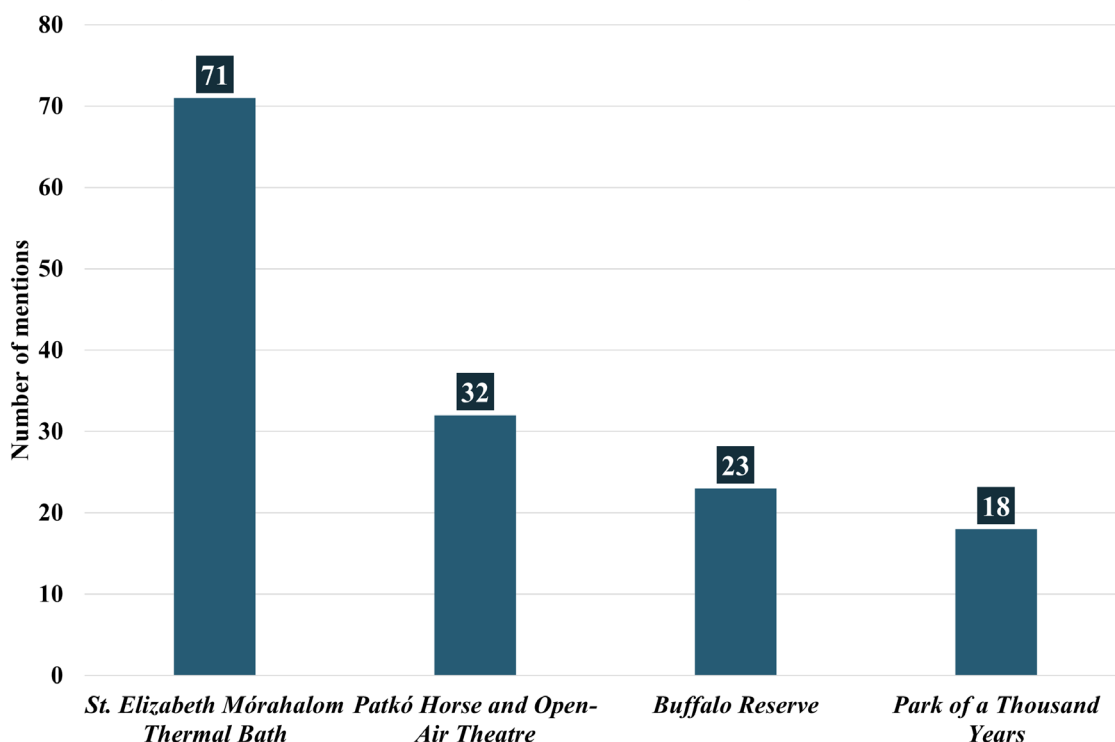
The next question focused on Mórahalom's tourist offerings, asking respondents to identify the attractions with the greatest tourism significance. The responses highlighted a mix of cultural and natural sites, as well as experience-based facilities, helping to identify the city's main attractions and strengths. The *Szent Erzsébet Mórahalom Thermal Bath* was cited by most respondents (Figure 3) as the city's primary draw. Located in the city center, it has become inseparable from Mórahalom's

identity, with many people associating the city itself with the bath. As the largest facility in the settlement, it further reinforces its importance not only as an attraction but also as a central element of the city and a defining part of its image.

Following the thermal bath, the *Patkó Equestrian Theater* was frequently mentioned. Despite its seasonal nature, it has quickly secured a significant position in the city. The equestrian theater performances and various cultural programs are unique in the region, attracting visitors from distant settlements. Other notable tourist attractions included the *Buffalo Reserve*, which offers visitors a glimpse into the area's natural heritage, and the *Thousand Years Park*, which reinforces the settlement's historical and cultural aspects.

While these are the most frequently mentioned and well-known attractions associated with Mórahalom, respondents also noted several smaller events and sights. Among them is the annual *Sokadalom*, one of the city's largest community programs. From a gastronomic perspective, the local *strudel house* was highlighted as a key feature. In spring, the city also hosts a *Tulip Garden*, part of a Hungarian tulip garden network, where flower enthusiasts can harvest special varieties in a cheerful setting. This diverse range of attractions suggests that Mórahalom has successfully developed a multifaceted tourism profile, appealing to various interests, from wellness and culture to nature and gastronomy.

Figure 3. Development of Mórahalom's tourism offerings based on responses



Source: Own editing (2024)

From a tourist perspective, the presence of tourism suprastructure is crucial, and residents proudly mention nationally recognized hotels that enhance the city's positive image with their excellent location and direct connection to the thermal bath. Respondents assessed that, based on these attractions and

tourist destinations, Mórahalom receives a slightly above-average rating at the national level in terms of its prominence in tourism. This also indicates that the settlement has room for further development to achieve greater recognition.

Given Mórahalom's proximity to the border, an important question is how supportive locals are of communication efforts directed at foreigners, which in this case primarily means Serbia. Within the 75-person sample, 30% of respondents considered it important, 30% gave a rating of 3 on a scale of 1–5, and 24% gave a rating of 4. Overall, the majority of respondents have a positive attitude towards communication and image-building efforts targeting foreign visitors. The proportion of supportive responses suggests that a significant part of the population recognizes the benefits and opportunities of making the settlement more attractive to international tourists.

This positive attitude towards international communication and branding indicates that Mórahalom's residents acknowledge the potential for growth and development that comes with attracting foreign visitors. It also reflects a level of openness and readiness for the city to position itself as an international destination, particularly by leveraging its proximity to Serbia.

The survey also examined which target groups the city is best suited for, whose needs it currently satisfies with its services, and towards whom promotional efforts would be most worthwhile. Respondents could choose from pre-given options, including tourists, families with young children, investors, local residents, and young people. Consistent with previous findings, tourists were considered the most suitable target group for the city, followed by families with young children. Young people received the lowest score, indicating that the settlement offers limited entertainment options for this demographic.

Based on these findings, Mórahalom has a diverse tourist offering that appeals to multiple target groups. According to respondents, the most important tourist attractions include the *Szent Erzsébet Mórahalom Thermal Bath*, the *Buffalo Reserve*, and the *Thousand Years Park*. However, these attractions primarily cater to tourists. Therefore, it is essential for the city to focus on making the environment and community more attractive and livable not only for visitors but also for local residents. This aligns with the city's efforts to develop a comprehensive tourism profile that encompasses wellness, culture, nature, and gastronomy.

The survey results highlight the need for a balanced approach to city development, ensuring that while Mórahalom continues to enhance its appeal for tourists, it also addresses the needs and preferences of its local population, particularly the younger demographic. This strategy could involve expanding entertainment options for young people and creating more opportunities that make the city attractive for long-term residence.

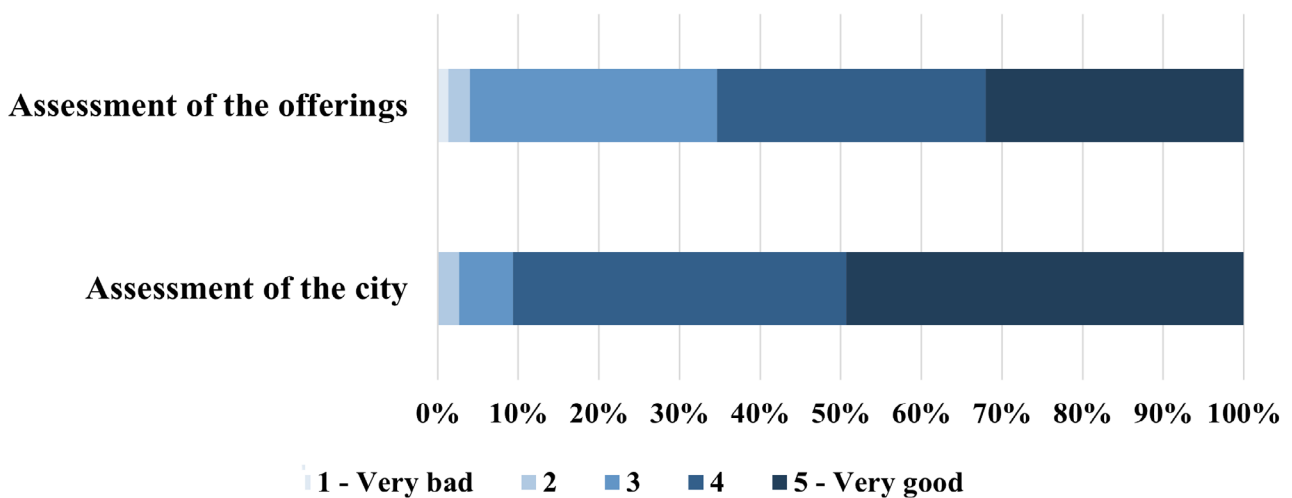
Importance and perception of the city brand by local residents

In the subsequent questions of the questionnaire, respondents were asked to evaluate the previously examined factors on a scale of 1 to 5, allowing for a quantifiable assessment. This enabled us to

compare and determine satisfaction levels regarding the city's image and tourist offerings. On average, respondents rated Mórahalom 4.37 overall, which aligns with the predominantly positive characteristics mentioned in the first question and suggests a relatively high level of satisfaction.

In contrast, the tourist offerings received a score of 3.92, which is lower than the general evaluation. This indicates that while the city has many attractive sights and programs, there is still room for improvement. It would be beneficial to involve local residents in city planning discussions to explore potential areas for development. By fostering collaboration and encouraging active participation, it is possible to enhance both the quality of life for residents and the city's infrastructure, ultimately making Mórahalom a more appealing destination for tourists as well (Figure 4).

Figure 4. Assessment of Mórahalom and its tourism offerings



Source: Own editing (2024)

The questionnaire also included questions related to the Mórahalom city brand, exploring residents' views on its importance and role in the city's life. When branding a settlement, the question arises as to how important it is for a city to have a brand and whether residents consider it essential. Most research does not examine this topic from the perspective of local residents; however, the literature makes it clear that they are a crucial target group.

According to the responses, residents believe that it is indeed important for a city to have its own brand, image, logo, and visual identity. A total of 65% of respondents agreed with this, indicating that branding, advertising, and managing visual identity elements have become vital components even for small towns.

In the case of Mórahalom, opinions on the current logo (Figure 5) and brand were quite divided. During the questionnaire, participants were shown an image of Mórahalom's current logo and asked to evaluate it on a scale of 1 to 5, resulting in an average score of 3.7. This suggests that the city leadership might consider some degree of rebranding to better represent the settlement's identity and enhance its image.

Figure 5. Current logo of Mórahalom



Source: visitmorahalom.hu

However, there is a certain level of inconsistency in the responses. When asked about the need for creating a new visual identity, only 20 respondents answered affirmatively, 31 said it was not necessary, and 24 chose the „maybe” option. This could be due to the subjective nature of design; the fact that a logo is not considered optimal does not necessarily mean it needs to be replaced. Another reason might be the desire to preserve authenticity, with respondents possibly supporting minor modifications rather than a complete overhaul.

When designing a city’s visual identity and brand, it is crucial to consider the colors and shades characteristic of that place, ensuring their consistent use in long-term campaigns. As part of the research, we explored which colors residents associate with the city. The most frequently mentioned colors were yellow and orange, likely due to the prevalence of buildings in the city center featuring these hues. Green and blue ranked second and third, with green associated with the numerous parks and greenery, and blue possibly symbolizing water. These colors also appear in the city’s visual identity, so it is not surprising that respondents linked them to Mórahalom.

Overall, the quantitative research indicates that residents have a positive perception of Mórahalom, viewing it as a developing, family-friendly, well-organized, and beautiful city. At the same time, they acknowledge certain drawbacks that city leadership could address through future improvements.

Main characteristics of Mórahalom’s image and brand

In the case of Mórahalom, conscious city branding dates back to 2013 when the settlement’s tourism visual identity manual was developed as part of a tourism destination management project. During this process, the city’s coat of arms was updated, a new logo was designed, and later the thermal bath also underwent a visual identity refresh. Regarding the city’s image and brand, it is clear that branding was built around the Szent Erzsébet Mórahalom Thermal Bath and its medicinal waters during the planning and development phases. „This is the result of a conscious planning effort supported by the municipal council for 30 years. They set this path in both a tourism development strategy and a destination development strategy. Along these lines, certain elements of the spa development were realized, and the settlement obtained its spa certification” (I1, male).



This focus on health tourism has become the city's flagship product, with significant emphasis placed on it in the tourism development strategy. The water is also reflected in the colors of the city logo, alongside symbols of sunshine and local geographical features. The waves in the logo represent the city's location in the Homokhátság region. Throughout the branding process, the municipality acted as the main stakeholder and initiator, as it holds majority ownership in most of the previously mentioned attractions. Additionally, the TDM organization and the leadership of the thermal bath were actively involved.

Over the years, the visual identity has not undergone major changes: "It has changed somewhat or been complemented with new elements. Over the past 8–9 years, alongside health tourism, the Patkó Equestrian Theater and Open-Air Theater have become key sectors. As a cultural attraction, it is complemented by the Thousand Years Park" (I2, male).

Interviewees mentioned that the current strategic plan includes the renewal of visual identity elements, although they intend to link this to a larger-scale development initiative. One participant highlighted that the city's greatest advantage lies in its value-for-money offerings, which many appreciate, as they believe Mórahalom provides high-quality products for tourists at affordable prices.

In recent years, Mórahalom has successfully secured several significant grant resources. The application process is strategically managed by the settlement to ensure these resources are effectively communicated to the relevant target groups through various channels. Among the awards frequently featured in their marketing communication are the "Spa of the Year" award won in 2018 and, more recently, the "Hotel of the Year 2023" award earned by the Elixír Medical Wellness Hotel. These accolades further enhance Mórahalom's reputation and positive image. "The 'Spa of the Year' award from 2018 is frequently used in our communication. Essentially, we operate with this logo. Awards typically come with marketing packages, and these are fully utilized by the respective institutions" (I3, female). In addition to these awards, various PR appearances are generated by the city's leadership, along with external media coverage. One interviewee emphasized that these efforts are particularly important because not only do different attractions positively influence each other, but they also contribute to building the destination as a whole.

The strategy and tools of city brand communication

A key and significant element in this context is the city's visual identity manual, which helps all entrepreneurs and attractions align with the city's image. As mentioned in previous chapters, communication is centered around the thermal bath, and efforts are made to create a comprehensive communication package, including items such as gift items, formal requirements for media appearances, and presentation templates. „This is a well-automated process. I think everyone has received these materials, which can be used as support. I'm referring to a full range of items, from municipal letterhead to business cards, various gift items, the formal presentation of press releases, or a presentation template" (I1, male).

With the help of these elements, the image is shaped, aiming to encourage purchases. It was also mentioned that the brand and its image can generally only stimulate the first visit, while high-quality services and word-of-mouth recommendations are necessary for repeat visits. However, this brand must be authentic in order to stand out from competitors and differentiate itself. According to one interviewee (I2), there is a gap between the Mórahalom population and the city brand, as they cannot fully identify with it. This can lead to a loss of identity, meaning the city needs to place greater emphasis on this aspect in the future.

Most promotional techniques have shifted to the online space, and this is also the case for Mórahalom. In addition to having their own unified websites, social media platforms are considered crucial, alongside various Google Ads services that help increase visibility. The city card provides access to an extensive database, enabling them to enhance their reach and better target specific actions, although it is important to note that the thermal bath's services often drive the issuance of the city card.

Newsletters are sent to different target groups through multiple platforms, but one of our interviewees noted that they have not yet reached their full potential with this tool. Purchases, particularly for the thermal bath and accommodations, are often boosted with seasonal promotions and coupon codes, which have proven effective in past seasons, although these are now made on an institutional basis rather than uniformly. These techniques can generate additional spending due to their stimulating and multiplier effects, but the extent of this depends heavily on how much is invested in communication toward the target group.

For Mórahalom, the foreign market is particularly important. During the interviews, we explored what methods are used to shape its image. The Serbian market has a strong tradition of travel exhibitions, and the city establishes useful partnerships through these events, appearing as far as Belgrade. They also finance various television and radio appearances and collaborate with travel agencies. Online, they publish targeted advertisements. Additionally, publications are available in Serbian within the city, and recently, they have employed Serbian-speaking staff to facilitate communication. Their main goal is to attract travelers from beyond the Vojvodina region and increase overnight stays, as currently, visitors often spend only a day in the city due to its proximity.

CONCLUSIONS

This study is grounded in the complex concept of city branding, which encompasses aspects of place marketing, place branding, and place promotion. The goal of city branding is to create a unique and attractive identity for a city that distinguishes it from competitors while attracting investors, tourists, and residents. The city branding process involves analyzing the city's strengths and weaknesses, identifying target groups, formulating brand messages, and selecting communication channels. A well-developed city brand can contribute to economic growth, social well-being, and environmental sustainability.

In place marketing, local residents are a crucial stakeholder group, playing a dual role in the branding process: they are both the target audience and active contributors to the brand's development. This study examined Mórahalom's city brand and image from the perspective of its residents. The research aimed to explore how residents perceive Mórahalom's city brand, what factors influence their perceptions, and what suggestions they have for its development.

A mixed-method approach was employed in the research. Quantitative data was collected through an online questionnaire survey targeting local residents. The questionnaire focused on key brand elements, associations with the city, satisfaction with tourism offerings, and resident involvement in branding. Additionally, qualitative data was gathered through semi-structured interviews, providing deeper insights into residents' opinions and experiences related to the city brand (Figure 6).

Figure 6. Components and Influences of the Mórahalom City Brand



The findings indicate that residents generally have a positive perception of Mórahalom and take pride in its development. The most frequently mentioned key elements of the city brand include the thermal bath, natural environment, gastronomy, and hospitality. However, residents identified areas for improvement, particularly in diversifying tourism offerings, engaging young people, and enhancing marketing communication effectiveness.

The study underscores the crucial role of resident involvement in shaping and strengthening the city brand. Active participation by residents can enhance brand authenticity, reinforce local identity, and foster community cohesion. The findings provide valuable insights for Mórahalom's city leadership, helping to refine branding strategies and tourism development plans. By identifying the strengths and weaknesses of the city brand and understanding resident expectations, this research offers a solid foundation for future improvements.

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Sustainable Tourism and Climate Resilience in the Maldives

ABSTRACT

This study examines the sustainability and climate resilience of tourism in Small Island Developing States (SIDS), with a primary focus on the Maldives. While tourism has played a crucial role in the economic development of many SIDS, it has also contributed to environmental degradation, social inequality, and institutional fragmentation. Employing a narrative literature review approach, this paper explores how tourism in the Maldives interacts with three key domains essential to sustainability in SIDS: environmental vulnerability, social inclusion and climate resilience, and governance and policy coherence. The analysis reveals that tourism development has placed significant pressure on environmental ecosystems through reef damage, inadequate waste management, and excessive freshwater consumption. Although community-based tourism initiatives show potential, they are still constrained by unequal power relations and insufficient institutional support. Furthermore, governance challenges—such as fragmented inter-agency coordination and regulatory capture—continue to hinder long-term sustainability efforts. The findings highlight that building a climate-resilient tourism sector requires the integration of community participation in environmental governance, the incorporation of Indigenous knowledge systems, and enhanced policy coherence between tourism and environmental objectives. These insights underscore the need for future research aimed at expanding empirical understanding of localized adaptation strategies and evaluating the long-term impacts of governance reforms intended to strengthen resilience in tourism-dependent SIDS.

Keywords: sustainable tourism, climate resilience, Small Island Developing States (SIDS), Maldives, Community-Based Tourism (CBT)

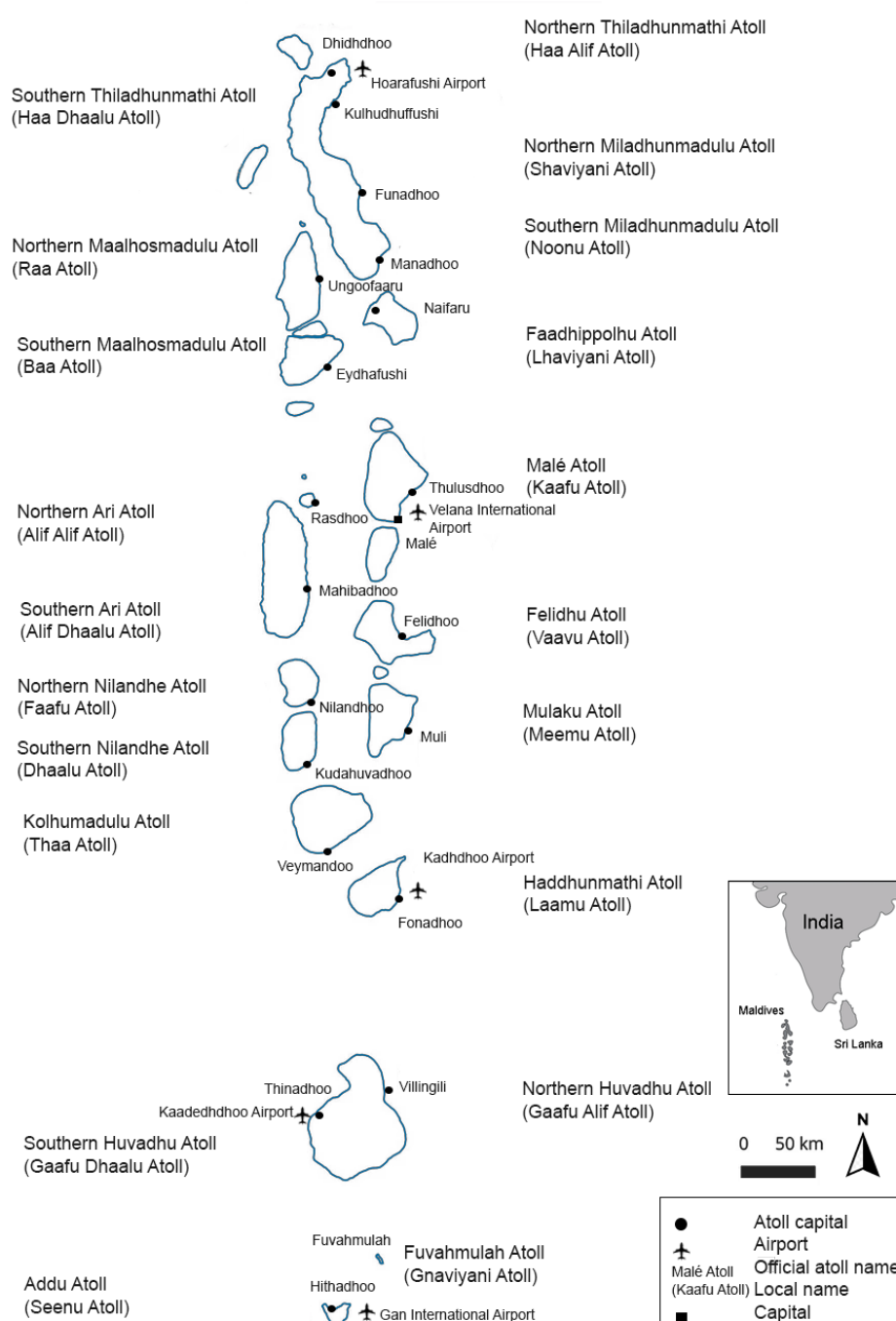
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INTRODUCTION

Small Island Developing States (SIDS) have long captivated the world with their stunning landscapes and rich biodiversity. However, beneath these picturesque scenes lies a complex array of structural vulnerabilities shaped by climate risks, limited resources, and a heavy dependence on tourism. The Maldives, comprising 1,192 coral islands grouped into 26 atolls, exemplifies these broader challenges. Located in the Indian Ocean and spanning 90,000 square kilometers of ocean, the country has only 298 square kilometers of land area, making it one of the most geographically dispersed and environmentally fragile nations in the world (Figure 1).

Figure 1. Administrative map of the Maldives showing atoll divisions and capitals.



Source: own editing based on National Bureau of Statistics, 2011

Since the 1970s, the Maldives has transformed from an isolated island nation into a globally renowned luxury tourism destination, attracting over 2 million visitors in 2024 (Corporate Maldives, 2024). Today, tourism is the largest contributor to GDP and accounts for a significant share of employment (Hampton & Jeyacheya, 2020; Marinakou, 2025; Shakeela & Weaver, 2018). However, this rapid expansion has also brought substantial challenges — such as ecological degradation, freshwater scarcity, growing social inequality, and heightened climate vulnerability — both globally and within the study area (Ghina, 2003; Scheyvens, 2011; Lekgau et al., 2025; Kiss et al., 2025; Iirndu & Donaldson, 2024; Gonda & Rátz, 2024).

This study explores how the Maldives can transition to a sustainable and climate-resilient tourism model by analyzing three interrelated domains: environmental vulnerability, social inclusion and climate resilience, and governance and policy coherence. These domains, derived from extensive literature on SIDS, serve as analytical lenses to assess both Maldivian and cross-regional dynamics in tourism sustainability.

Research on the Maldives has intensified in recent years, highlighting critical concerns such as environmental degradation, overreliance on tourism, and governance limitations (Acciarri et al., 2021; Ali & Jaleel, 2024; Domroes, 2001; Ghina, 2003; Scheyvens, 2011; Shakeela & Weaver, 2018; Zuhair & Kurian, 2016). However, much of this research remains fragmented, with limited synthesis across thematic areas or comparative analysis with other Small Island Developing States (SIDS) facing similar challenges. Many existing studies tend to overlook how environmental, social, and institutional factors interact to shape sustainability outcomes.

To address this gap, the present study situates the Maldivian experience within broader perspectives from the Caribbean, AIMS, and Pacific regions. By emphasizing equity, environmental integrity, and institutional coherence, this study aims to reframe tourism sustainability in the Maldives as an interdependent challenge requiring systemic, locally grounded solutions.

METHODS

This study employs a narrative literature review approach to examine tourism sustainability and climate resilience in Small Island Developing States (SIDS), with a particular focus on the Maldives. The analysis is organized around three thematic lenses identified in contemporary scholarly discourse: environmental vulnerability, social inclusion and climate resilience, and governance and policy coherence. A narrative review was selected for its capacity to synthesize a broad, multidisciplinary body of knowledge and to facilitate detailed comparisons across diverse contexts (Cronin et al., 2008; Popay et al., 2006).

The literature search and selection were carried out using academic databases such as Scopus and Web of Science. A variety of sources were reviewed, including peer-reviewed journal articles, book chapters, expert reports, and government publications. The analysis involved thematic coding and synthesis, establishing connections between empirical findings, theoretical insights, and exemplary

practice models across SIDS regions. Particular emphasis was placed on drawing lessons applicable to the Maldivian context, while also acknowledging specific limitations and opportunities.

In addition to the literature review, several case studies were analyzed to explore changes and crises affecting the social, economic, and natural environments. Ideal subjects for case study research include emerging phenomena or issues situated within interdisciplinary frameworks that impact these domains.

RESULTS

This section analyzes key insights from the narrative literature review through the three analytical domains that structure the study: environmental vulnerability; social inclusion and climate resilience; and governance and policy coherence. The findings are contextualized within the broader discourse on sustainable tourism in SIDS, with a specific focus on the Maldives.

Environmental vulnerability

In the Maldives, tourism development has significantly increased ecological stress on both marine and terrestrial environments (Domroes, 2001). Resort construction often requires land reclamation and dredging, which destroy coral reefs—vital ecosystems that provide essential ecological services and generate substantial economic benefits through tourism (Jaleel, 2013; Pancrazi et al., 2020, 2023; Zubair et al., 2011). These pressures are compounded by rising ocean temperatures, leading to widespread coral bleaching events (Andersson, 2007; Bessell-Browne et al., 2021; Edwards et al., 2001; McClanahan, 2000; Morri et al., 2015; Schuhmacher et al., 2005). In addition to these climate-related stressors, tourist activities such as reef walking, anchoring, and unregulated diving further degrade coral health and marine biodiversity (Cavallini et al., 2023; Forrester et al., 2015; Hernández-Delgado, 2023; Lin, 2021; Williamson et al., 2017).

Waste management practices on resort islands also exacerbate marine degradation. Solid waste is commonly transported to Thilafushi—the Maldives’ designated landfill island—where poor handling results in leachate runoff and air pollution, harming nearby ecosystems and public health (Munshi et al., 2022). These practices reflect a systemic failure to integrate sustainability into core operational standards across the tourism sector.

Freshwater scarcity constitutes another significant environmental strain, as resorts consume water at rates disproportionate to those of surrounding communities (Acciarri et al., 2021; Belmar et al., 2016; Deng & Bailey, 2017; Forde et al., 2024; Jaleel et al., 2020; Winters et al., 2022). Groundwater extraction for tourism purposes accelerates salinization and depletes already limited aquifers—particularly on smaller islands with fragile hydrological systems. This resource competition highlights broader equity concerns in the allocation of natural resources between tourism operators and local populations.

Moreover, the Maldives' extremely low elevation exacerbates its vulnerability to sea-level rise, a well-documented threat across multiple SIDS (Adloff & Rehdanz, 2024; Ali & Jaleel, 2024; Amores et al., 2021; Biasio, 2024; Doorga et al., 2024; Hernández-Delgado, 2024; Martyr-Koller et al., 2021; Wong, 2018; Woodworth, 2005). Despite receiving international attention and making national commitments to climate resilience, progress remains slow. Coastal management initiatives have failed to keep pace with the rapid expansion of tourism infrastructure. The persistence of these environmental threats underscores a profound disconnect between sustainability rhetoric and the enforcement of effective regulatory measures.

Social inclusion and climate resilience

In the Maldives and across SIDS, inclusive development is critical for achieving economic equity, sustainability, and climate resilience. Although the tourism sector has driven economic growth, it frequently marginalizes local populations. Expatriates obtain the majority of formal employment opportunities in the tourism industry, while many Maldivians are confined to low-wage, precarious jobs (Shakeela & Cooper, 2009; Shiyar et al., 2023). While most SIDS national policies emphasize the importance of localization, structural barriers—such as inadequate vocational training, language constraints, and centralized recruitment systems—impede meaningful inclusion (Baum, 2012; Praptiwi et al., 2021). As Domroes (2001) and Scheyvens (2011) noted decades ago, a persistent disconnect exists between local communities and the Maldivian tourism economy, particularly in outer atolls, where communities bear the ecological burdens of tourism yet receive minimal economic benefit.

Social inclusion in tourism planning is essential not only for equitable development but also for enhancing environmental stewardship (Soulard et al., 2024). Exclusion reduces community engagement in conservation, whereas inclusion fosters a sense of ownership and responsibility. The marginalization of locals in tourism governance across many SIDS reflects deeper power asymmetries that obstruct effective environmental management (Scheyvens & Momsen, 2008; Tosun, 2000). In the absence of participatory methods, top-down strategies often disregard local knowledge systems and cultural values that are crucial for sustainable practices. Research from other SIDS demonstrates that empowering communities with voice and agency can lead to more adaptive and resilient tourism systems (Dłużewska & Giampiccoli, 2021; Jackson, 2025).

Community-based tourism (CBT) is increasingly recognized as a promising strategy to advance Sustainable Development Goal (SDG) 1 (No Poverty) and SDG 8 (Decent Work and Economic Growth) (Jackson, 2025). CBT promotes local economic participation and sustainable livelihoods by ensuring that revenues generated from tourism remain within the community. This stands in stark contrast to mass tourism, which often results in economic leakage and the exclusion of local stakeholders. Dangi and Jamal (2016) emphasize that a comprehensive strategy integrating sustainable tourism and CBT is essential. Neither approach alone is sufficient to address complex challenges such as climate change and poverty alleviation. Consequently, sustainability efforts must be aligned with local priorities,

including community empowerment, capacity building, and sustainable income generation, to ensure the long-term success and resilience of CBT initiatives.

Tourism in guesthouses across the Maldives showcases how inclusive and community-oriented tourism can contribute to sustainability. Research shows that this model has diversified local income streams, created new employment opportunities, and enabled more Maldivians to engage in tourism as entrepreneurs and hosts rather than merely as employees (Chia & Muiz, 2021; Shenaan & Schänzel, 2024; Zubair & Bouchon, 2014). This form of community participation marks a significant shift in access to tourism benefits; however, it should not be equated with genuine participatory governance. Communities still have limited influence over tourism planning, regulation, and its integration into broader development agendas. Shakeela and Weaver (2018) emphasize that residents are frequently excluded from formal planning processes in guesthouse-heavy areas, which restricts their role in shaping tourism policy and hinders the pursuit of sustainable, community-driven futures.

The vulnerability of the guesthouse sector became especially apparent during the COVID-19 pandemic. Shareef et al. (2025) report that guesthouse owners were largely unprepared for the crisis, lacking both financial reserves and institutional support. This economic fragility reduced their resilience and discouraged long-term sustainability efforts. These findings underscore that inclusion must go beyond participation to encompass preparedness, social protection, and institutional resilience.

To develop climate-resilient tourism systems, it is essential to incorporate local perspectives and Indigenous knowledge into planning and adaptation strategies. Research from other small island contexts shows that when communities are empowered to embed cultural values and environmental priorities into tourism governance, outcomes tend to be more socially just and ecologically sound (Hiwasaki et al., 2014; Mercer et al., 2010). In the Maldives, this means deepening community engagement in tourism (Giourgali et al., 2024), while ensuring it serves as a foundation for environmental stewardship, adaptive capacity, and collective resilience.

Governance and policy coherence

Governance is crucial for aligning tourism development with environmental sustainability and climate adaptation. However, decades of policy fragmentation and weak enforcement have resulted in significant institutional blind spots (Al Suood, 2023; Brown et al., 1997; Rasheed, 2014; Zubair et al., 2011). Although multiple strategic documents—such as the *Tourism Master Plans* (Ministry of Tourism, 2023)—articulate sustainability goals, implementation is often undermined by poor inter-agency coordination and overlapping mandates (Domroes, 2001; Scheyvens, 2011; Zubair et al., 2011; Zuhair & Kurian, 2016).

Lessons from other SIDS suggest that coherent policy environments and integrated planning frameworks are essential for tourism resilience (Sharpley & Ussi, 2014). In countries like Fiji and Barbados, national tourism plans have successfully embedded disaster risk reduction and climate adaptation measures into zoning regulations, insurance schemes, and infrastructure investments

(Becken, 2005; Mycoo & Chadwick, 2012; Mycoo, 2014, 2018). These examples highlight the value of institutionalizing resilience within tourism governance structures.

In the Maldives, deeper systemic challenges persist. The tourism sector is characterized by regulatory capture and elite dominance, with entities such as the Maldives Association of Tourism Industry (MATI) wielding disproportionate influence over policy formulation and land-use decisions (Scheyvens, 2011). This dynamic often leads to policies that prioritize commercial interests over ecological integrity and social equity, eroding public trust and restricting local stakeholder participation.

Scobie (2016) observes that even in contexts where climate governance is formally prioritized, fragmented institutional setups, limited data sharing, and reliance on short-term, project-based funding weaken policy coherence. These challenges are evident in the Maldives, where siloed operations between the Ministry of Tourism and environmental agencies hinder integrated, forward-looking planning.

CONCLUSIONS

The review highlights persistent structural tensions at the heart of sustainable tourism in Small Island Developing States (SIDS), particularly in the Maldives. A recurring theme across the literature is environmental degradation, directly linked to tourism expansion. In the Maldives, rapid development has intensified ecological stress, especially on fragile coral reef systems, freshwater reserves, and waste management infrastructure. These findings reflect broader trends identified across SIDS, where tourism often accelerates the depletion of critical natural resources due to inadequate planning and fragmented environmental governance. Sustainability goals are rarely achieved when ecological protections are reactive or weakly enforced, and when tourism infrastructure is prioritized over ecosystem resilience. The Maldives thus exemplifies the broader challenge faced by SIDS: balancing economic dependence on tourism with the need to protect the very environments that sustain it.

The second theme underscores the importance of social inclusion as a foundation for environmental stewardship and climate resilience. The guesthouse tourism model in the Maldives has expanded opportunities for income diversification and community participation. However, this engagement is often superficial. True participatory governance—where communities meaningfully influence tourism planning and policy—remains absent. Genuine community empowerment, particularly when it incorporates traditional knowledge systems and localized adaptation practices, can foster more durable and context-sensitive forms of tourism governance. Without deeper institutional reform to promote inclusive governance, the potential of guesthouse tourism to act as a vehicle for resilience in the Maldives remains unrealized.

The exclusion of local populations from economic decision-making increases the incidence of social dilemmas and deviant behavior, thereby limiting the development of social well-being and sustainability.

Despite numerous policy instruments, Maldivian institutions remain siloed, with limited collaboration between environmental agencies and tourism authorities. The literature reveals that

this fragmentation is not unique. In other SIDS, weak inter-agency coordination, political capture, and top-down policy implementation are common governance challenges that hinder sustainability transitions. The review illustrates that meaningful policy coherence requires more than drafting national frameworks; it necessitates structural reforms that integrate climate risk considerations across tourism, finance, infrastructure, and local governance sectors. Institutional models from other SIDS demonstrate how inclusive governance structures can translate high-level policy into tangible outcomes.

The findings demonstrate that sustainable tourism in SIDS must be approached as a dynamic, intersectoral challenge. For the Maldives to lead in this area, it must adopt a systems perspective that places environmental integrity, equity, and adaptive governance at the core of its tourism development model. Only then can tourism be transformed from a risk-laden dependency into a vehicle for sustainable and inclusive prosperity. Building resilience also requires embedding participatory justice into tourism and climate governance frameworks, ensuring that local communities become genuine partners rather than passive beneficiaries.

In addition to case study analyses, this study conducts a narrative review of extensive literature, critically examining three interlinked domains—environmental vulnerability, social inclusion and climate resilience, and governance and policy coherence—that influence tourism sustainability in SIDS. It highlights that tourism growth in the Maldives has resulted in significant environmental degradation, particularly through coral reef damage, pressure on freshwater resources, and inadequate waste management. Although awareness is increasing, environmental pressures continue to exceed the capacity of existing regulatory protections. The situation in the Maldives reflects broader patterns across Small Island Developing States (SIDS), where tourism infrastructure and weak environmental governance place increasing strain on fragile ecosystems.

Moreover, achieving inclusive development remains elusive. While community-based guesthouse tourism has created expanded opportunities for local entrepreneurship, it has not led to genuine participatory governance. Local communities remain marginalized in policy planning processes, limiting their ability to shape tourism's trajectory and weakening incentives for environmental stewardship. Studies from other SIDS emphasize the importance of incorporating Indigenous knowledge and empowering local stakeholders to strengthen climate resilience from the ground up—an area in which the Maldives has yet to fully succeed.

The paper also discusses how fragmented institutions and elite capture significantly impede sustainability. Policy frameworks frequently operate in isolation, and national adaptation strategies often lack cohesion between tourism and environmental governance. Insights from other island nations indicate that building resilience requires coherent policies, cross-sectoral collaboration, and the decentralization of authority to local governments.

Tourism can serve as a catalyst for resilience in the Maldives, provided it undergoes restructuring through inclusive governance, robust environmental planning, and reforms aligned with climate priorities. Adopting a systems-based approach that views tourism not only as an economic sector but also as a vehicle for sustainable development is crucial to transforming the Maldives and other Small Island Developing States into destinations with climate-resilient futures.

Future research should focus on empirical evaluations of integrated governance approaches in the Maldives and other SIDS, assess the long-term outcomes of community-based tourism initiatives, and explore how localized climate adaptation strategies can be operationalized through tourism frameworks. Such research will help bridge existing knowledge gaps and guide the practical transformation of tourism systems in climate-vulnerable island contexts.

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Water Resources and Rural Tourism in Sub-Saharan Africa: Perceptions, Potential, and Poverty Alleviation

ABSTRACT

Sub-Saharan African rural communities possess unique tourism resources, including water bodies. However, water resources in these communities are rarely viewed through the lens of tourism. This paper explores the multifaceted role of water resources in fostering rural tourism development and alleviating poverty in Sub-Saharan Africa (SSA). It examines rural communities' beliefs and attitudes toward water resources, investigating how these perceptions influence their potential as tourism assets. A systematic literature review was conducted, synthesising peer-reviewed publications, reports, and other documentary materials focusing on the nexus between water resources, rural tourism, and community development. The findings highlight that water resources in Sub-Saharan Africa's rural communities are primarily perceived through a subsistence lens, serving physiological, agricultural, and spiritual needs. However, deep-seated myths and legends often generate fear and hinder water-based recreational and tourism activities. Despite these challenges, water resources such as rivers, lakes, and deltas hold considerable untapped potential for promoting sustainable rural tourism, diversifying rural economies, and reducing poverty. The study underscores the importance of reframing water as a valuable tourism asset while respecting indigenous knowledge systems. By integrating water resources into rural tourism strategies, communities can achieve significant socio-economic benefits, contributing to Sustainable Development Goals (SDGs) 1 (No Poverty) and 2 (Zero Hunger).

Keywords: water and tourism, rural water tourism, water perceptions, rural tourism, rural communities

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INTRODUCTION

Poverty and climate change are two of the greatest challenges facing humanity today (FAO, 2017; Ndabeni, 2019). While climate change is a global phenomenon, poverty is predominantly concentrated in rural communities, with 75% of the world's poor living in rural areas, particularly in low-income economies such as those of Sub-Saharan Africa (SSA, Figure 1) (Chaudhry & Gupta, 2010; Bolarinwa & Simatele, 2023; Fosu & Gafa, 2020). Although Africa is a diverse region with significant variations in economic development and living standards across countries (De Magalhães & Santaaulàlia-Llopis, 2018), poverty remains a pervasive issue in many parts of the continent (Addae-Korankye, 2014). A large proportion of the African population depends on subsistence farming for their livelihoods (Sibhatu & Qaim, 2017); however, challenges such as erratic weather patterns, soil degradation, and limited access to modern agricultural technologies have contributed to food insecurity and the entrenchment of poverty (Ndabeni, 2019; Rogerson, 2025).

Given the pristine nature of many rural communities in SSA, often situated in areas endowed with natural landscapes and water resources, researchers are increasingly highlighting the tourism potential of these regions as a means to foster community development and upliftment (Fang & Fang, 2020; Ramaano, 2022). Similarly, the Food and Agriculture Organization (FAO, 2017) contends that achieving the Sustainable Development Goals (SDGs) will heavily depend on progress made in diversifying rural economies. Tourism provides rural communities with an opportunity to diversify their economic base and reduce their dependence on subsistence agriculture for survival (Chin, 2022; Padilha et al., 2018). As tourism continues to make significant economic strides in its recovery from the COVID-19 pandemic (Marques et al., 2022; Zhang et al., 2021), rural destinations are becoming increasingly attractive to travellers seeking unique and authentic experiences (Bel et al., 2015; Guzman-Parra et al., 2015; Lempek & Tésits, 2021; Lempek et al., 2022).

Most rural settlements in SSA follow a linear pattern along water resources (Ambe et al., 2018; Xu et al., 2020). Water resources such as rivers, lakes, waterfalls, and coastal areas possess inherent natural beauty and recreational potential, which can substantially enhance the tourism appeal of rural communities (Ariyani & Fauzi, 2024; Torquati et al., 2017). Despite this potential, water is seldom viewed as a tourism resource in rural communities. Instead, it is primarily regarded through the lenses of agriculture, public health, and nutrition (Haloba, 2022). While previous studies have examined the role of tourism in rural development, limited research has focused specifically on rural communities' beliefs and perceptions regarding water as a tourism resource, and on the role of water resources in advancing rural tourism development (Folgado-Fernández et al., 2019).

Water resources and tourism are two critical yet underexplored dimensions of sustainable development in Sub-Saharan Africa (SSA). The region continues to face persistent challenges such as poverty, food insecurity, and climate change, with rural communities bearing the brunt of these adversities (FAO, 2017; Ndabeni, 2019). While agriculture remains the primary livelihood for most rural populations, its vulnerability to environmental shocks necessitates economic diversification (Sibhatu & Qaim, 2017). Tourism, particularly rural tourism, offers a viable pathway to financial

resilience, yet its potential remains largely untapped, especially regarding water-based attractions (Ramaano, 2022; Fang & Fang, 2020).

The nexus between water resources and tourism is particularly significant in SSA for three main reasons. First, it contributes to economic diversification and poverty alleviation (Lekgau et al., 2025). Given that rural communities in SSA grapple with poverty and rely primarily on subsistence farming (Bolarinwa & Simatele, 2023), water-based tourism, such as ecotourism, fishing expeditions, and cultural heritage tours, can provide alternative livelihoods and reduce dependence on climate-sensitive agriculture (OECD, 2020; Travers, 2015).

Figure 1. Map of Sub-Saharan Africa



Source: David et al. (2020)

Second, the convergence of water resources and tourism offers opportunities for cultural and ecological preservation. Many water bodies in SSA hold deep cultural and spiritual significance (Siwila, 2015; Witzel, 2015), making it feasible to integrate indigenous knowledge systems into tourism frameworks. This ensures that development respects local traditions while promoting conservation (Mbaiwa & Stronza, 2010). For instance, community-based initiatives such as Botswana's Okavango Delta model demonstrate how sustainable tourism can coexist with cultural preservation (Darkoh & Mbaiwa, 2014).

Third, water and tourism play vital roles in enhancing climate resilience and promoting sustainable resource management. Water scarcity and pollution threaten both rural livelihoods and tourism potential (Gössling et al., 2012). The development of water-conscious tourism strategies can incentivise

better resource governance, align with SDG 6 (Clean Water and Sanitation), and contribute to the emergence of climate-resilient economies (LaVanchy, 2017; Folgado-Fernández et al., 2019).

Accordingly, this paper aims to explore, on the one hand, rural communities' beliefs and attitudes toward water bodies, and on the other, the multifaceted role of water resources in promoting and sustaining tourism development while combating poverty in rural areas. It highlights the untapped potential of water bodies in enhancing rural tourism, which can significantly contribute to poverty reduction and economic diversification. By shifting perceptions of water resources from being solely agricultural or subsistence-related toward being valuable tourism assets, this research can inform policymakers and stakeholders in crafting sustainable tourism strategies that preserve natural and cultural heritage while strengthening local economies.

METHODS

Guided by the observations made by Nunkoo et al. (2013), which highlight the crucial role of literature reviews in all academic research fields, this study is grounded in a systematic literature analysis of scholarly works and documentary materials. A systematic literature review, which has become increasingly popular in recent years, is a method that involves the rigorous and structured selection and scrutiny of scientific articles from selected databases, following established guidelines (Koustus et al., 2019). The databases accessed were Google Scholar, Scopus, and Web of Science, from which all the reviewed literature was sourced. The analyses followed the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) guidelines developed by Moher et al. (2009).

Six inclusion and exclusion criteria were applied: theme (water resources and rural tourism), geographical region (Sub-Saharan Africa), publication type (peer-reviewed journal articles, book chapters, and official government reports), keywords (water and tourism, rural water tourism, water perceptions, rural tourism, rural communities), time frame (2004 to 2024), and language (English). Only articles that met these criteria were included in the review. The initial literature search identified 432 documents published between 2004 and 2024. Of these, 141 papers were excluded because their titles were irrelevant to Sub-Saharan Africa. A further 163 papers were excluded because their abstracts did not match at least one of the inclusion criteria. Ultimately, 128 documents were selected for full analysis. After full-text screening, 70 documents were excluded, leaving 58 papers for the final systematic review.

RESULTS

Rural communities' beliefs and perceptions of water resources

Water as a physiological resource

Sayadi and Shafiee (2020) contend that determining and assessing community members' beliefs and attitudes concerning water is paramount, as such beliefs strongly influence and explain their

interactions with water. In a study that evaluated the perceptions, sources, and uses of water in six rural communities in the North-West Province of South Africa, Coetzee et al. (2016) unearthed a myriad of specific physiological and psychological beliefs that residents hold about water. One perception is that water is a shared resource that ought to be free and readily available to everyone, as it is used on a day-to-day basis for physiological household uses such as drinking, sanitation, and livelihood-supporting activities like plant and animal husbandry (Haloba, 2022; Kaoma, 2017; Makoni et al., 2004; Smits et al., 2010). In the study by Coetzee et al. (2016), only a few individuals in the rural areas, mostly youths, utilise water resources for recreational purposes such as swimming and fishing.

Water as a spiritual and cultural resource

Water holds profound spiritual and cultural significance across Africa, serving as a nexus between the physical and metaphysical realms. Sacred water bodies, such as the Osun River in Nigeria and Lake Fundudzi in South Africa, are venerated as dwelling places of deities and ancestral spirits and are central to rituals like the annual Osun-Osogbo festival and Venda rainmaking ceremonies (Coetzee et al., 2016; Witzel, 2015). Water's sacred role extends to creation of myths (e.g., the Dogon's Nommo spirits) and healing practices, where *sangomas* use ritually significant waters for purification and communion with ancestors (Khorombi, 2007; McElroy, 2020). These beliefs often enforce conservation taboos, such as prohibitions against polluting or overexploiting spiritually charged waters (Mbaiwa & Stronza, 2010).

The intertwining of water and spirituality underscores its dual function as both an ecological resource and a form of cultural heritage. Indigenous ontologies, such as the Tonga people's reverence for the Nyami Nyami spirit in the Zambezi River, exemplify how cosmological narratives shape human-water interactions (Siwila, 2015). Though increasingly challenged by modernisation, such traditions remain vital to community identity and environmental stewardship, necessitating their integration into sustainable development frameworks (Darkoh & Mbaiwa, 2014). This cultural embeddedness highlights the imperative for policies that harmonise utilitarian water use with the preservation of intangible spiritual values.

On the psychological front, one belief is that water has capabilities beyond physical uses such as drinking and sanitation, playing significant spiritual and cultural roles in the lives of rural communities (Khorombi, 2007; McElroy, 2020; Siwila, 2015; Witzel, 2015). This reinforces the sacred perception of water in rural communities. Various religious, spiritual, and cultural practices are noted. In the realm of religion, such as Christianity, water is used in rituals such as foot washing and the baptism of new church members and newborns (Coetzee et al., 2016).

In African traditional religion and some Christian practices, water is used as a medium through which evil spirits can be driven away from people or places (Coetzee et al., 2016; Kaoma, 2017). Water also plays central roles in various other spiritual and traditional practices, from supporting believers during periods of fasting, to the initiation of traditional healers, the preparation of traditional medicines, the brewing of traditional beer, and sacred uses at funerals (Khorombi, 2007; McElroy, 2020; Sayadi & Shafiee, 2020).

Mythology and legends

Myths and legends have also shaped rural communities' beliefs, attitudes, and perceptions toward water bodies. Witzel (2015) contends that water has played a significant role in human mythology, from stories reconstructed and recorded from early civilizations to those told by different religions today. Rural communities have long believed that large water bodies, such as dams and lakes, are sacred, and that special permission was required from ancestors, often mediated through spirit mediums, to visit these lakes or use their waters (Khorombi, 2007; McElroy, 2020). This belief is widespread among rural African communities. For example, the Tshiavha people of South Africa (Khorombi, 2007), and the Tonga people of Zambia and Zimbabwe (Kaoma, 2017; Siwila, 2015), share this view.

Legends of supernatural creatures, such as giant snakes, mermaids, and large fish believed to inhabit these waters, have further reinforced the sacredness of surface water resources in the eyes of rural communities. In Baganda folklore, the legend of Lukwata (meaning "great sea serpent") is prominent. This creature, said to dwell in Lake Victoria in Uganda, is estimated to be 6 to 10 meters long, with a rounded head and smooth dark skin, and is known for attacking boats and fishermen (Hobley, 1913; Kenny, 1977). Similarly, the Tonga people believe in a comparable entity called Nyami Nyami, also known as the Nyami Nyami River God, said to dwell in the Zambezi River basin between Zambia and Zimbabwe (McElroy, 2020; Siwila, 2015). Like the Lukwata, Nyami Nyami is believed to be a serpent-like creature, 3 metres wide with an unknown length. However, unlike the aggressive Lukwata, Nyami Nyami is famed for its benevolence—especially in times of drought—surfacing on the riverbanks to allow locals to cut meat (*nyami*) from its back to survive (Evans, 2018; Hanzen et al., 2017; Hoo & Axelrod, 2016).

Witzel (2015) suggests that traditional elders may have deliberately propagated these legends and myths to limit access to and use of water bodies as a means of conservation and preservation. Nonetheless, Khorombi (2007) notes a decline in these traditions and beliefs due to the growing influence of Western lifestyles and education. Even so, such beliefs and myths have fostered and perpetuated an aura of fear surrounding water bodies for generations. This has contributed to a general reluctance toward embracing water for recreational and tourism purposes among rural communities. Therefore, there is a need to demystify these myths in a way that respects and does not undermine indigenous knowledge and culture.

The role of water resources in promoting rural tourism development

Rurality and rural tourism

National parks, wilderness areas, mountains, lakes, and cultural monuments are among the most popular tourist attractions, particularly in developing countries (Chambwe & Saayman, 2023). These attractions are mostly found in rural areas. As a result, tourism already constitutes a significant component of the rural economy in many such locations. While tourism is unlikely to dominate all rural areas, especially in the developing world, where vast swaths of rural land exist, and where

tourism may be irrelevant for the foreseeable future, there are nonetheless some impoverished rural communities with tourism potential and an urgent need for development (Okech et al., 2012).

Rurality is associated with geographical areas characterised by vast open lands and small-scale settlements. These areas tend to have low population densities and are dominated by agriculture, forestry, and natural regions (Jange, 2013). Moreover, rural areas are often comprised of traditional societies where cultural and historical influences are strong, and where government policies tend to promote conservation over rapid or radical change (Marques et al., 2022; UNWTO, 2023).

Various scholars have proposed different definitions of rural tourism. The United Nations World Tourism Organization (UNWTO, 2023) set the tone by classifying rural tourism as tourism in which guests engage in a variety of products and activities related to nature, agriculture, traditional culture, sightseeing, and rural lifestyles. A more elaborate definition is provided by Okech et al. (2012), who go beyond listing the activities that constitute rural tourism and emphasize that such activities must occur in rural areas, places where land use is predominantly agricultural and forestry-based, population density is low, and traditional lifestyles and structures are dominant. Similarly, according to the Organisation for Economic Co-operation and Development (OECD, 2020), rural tourism is defined as tourism located in rural areas, functionally rural, rural in scale, traditional in character, sustainable, and diverse, representing the complex patterns of the rural environment, economy, and history. Put simply, and in line with the above definitions, rural tourism can be summarily described as the set of tourist activities undertaken in rural areas.

Šajn and Finer (2023) argue that, following the COVID-19 pandemic, rural tourism has grown in popularity due to the emergence of a new travel paradigm and an increased demand for private, authentic, and nature-based experiences away from major tourist destinations. Despite the pandemic's severe negative effects on tourism, the crisis created an opportunity to rethink the future of the sector (OECD, 2020). In the same vein, Zhang et al. (2021) contend that the broader economic and social consequences of the pandemic necessitated and catalysed a fundamental rethinking of how to structure the tourism sector. Destinations that had heavily relied on more conventional forms of tourism (international, commercial, and event-based) suffered the most, whereas many coastal, regional, and rural communities fared better than urban centres.

Water and tourism

Water resources play a pivotal role in the advancement of rural societies, as they significantly impact economic development. Humans have long relied on rivers and water resources for their development, with historical records demonstrating how communities and institutions have been propelled by activities such as farming, animal husbandry, fishing, tourism, and industry, as they cater to their day-to-day needs (Lin et al., 2022; Solís & Zhu, 2015). A study by Sayadi and Shafiee (2020), which highlighted and quantified the significant decrease in surface and groundwater resources, and how this has diminished agricultural land use in rural areas, called for the development of alternative economic activities such as rural tourism and agrotourism to reduce dependence on water resources. Compared to agriculture, tourism is not a major consumer of water and has been identified as a powerful development path for Africa (Travers, 2015).

From the perspective of tourism, the role of water can be understood on a dual axis: on one hand, water is regarded as a valuable resource; on the other, it is a formidable attraction (Folgado-Fernández et al., 2019). As a valuable resource, research has focused on proposing tourism ventures and practices that can be developed without compromising the availability and quality of water resources. In this context, the link between tourism and water has been framed in terms of sustainability (Cole & Ferguson, 2015; Gössling et al., 2012; LaVanchy, 2017). Various types of water tourism offer significant potential for developing and implementing new sustainable water resource management methods, with positive impacts on environmental protection, biodiversity, and local ecosystems (Trovato et al., 2017). Water-based tourism initiatives thus have the potential to transform water resources into long-term economic and social assets. Tourism can be used to drive regional development, protect unique ecosystems, and improve the quality of life for both tourists and local communities (Costa et al., 2014).

As a tourist attraction, surface water resources such as natural pools, springs, lakes, reservoirs, rivers, seas, and beaches represent strong assets with enormous potential to attract diverse types of tourists (Folgado-Fernández et al., 2019). Emerging trends and new perspectives on water-based landscapes and activities have begun to take shape (Costa et al., 2014). These practices are gaining popularity because they align with cultural values cherished by many tourists, including health, well-being, and environmental stewardship (Santarem et al., 2018). Forms of tourism such as thermal tourism have been enabled and enhanced by water resources and the rural environment. Thermal tourism is particularly relevant and appealing to the elderly (Costa et al., 2014), who constitute the largest component of today's population and possess both time and money—two of the most valuable “currencies” in tourism. This type of tourism has gained favour among tourism practitioners due to its resistance to seasonality and longer average stays compared to other forms of water tourism (Alina-Cerasela, 2015; Kruger, 2017). As a result, water-based rural tourism initiatives are being developed in response to evolving consumer demands.

One notable example illustrating the potential of water resources in advancing rural tourism in Africa is the Okavango Delta. Located in north-western Botswana and regarded as the largest inland delta in the world (Darkoh & Mbaiwa, 2014; Mogomotsi et al., 2020; Phonchi-Tshekiso et al., 2024), the Okavango Delta supports vibrant community involvement in tourism activities centred around the river basin. Communities use the *mokoro*, a traditional canoe-like vessel, to transport tourists on game-viewing safaris through the Delta (Human et al., 2023; Mbaiwa et al., 2008).

A study by Matanzima (2024) further illustrates how various rural communities along Lake Kariba in Zimbabwe's Zambezi Valley have interacted with the lake over the years, primarily through fishing and, to some extent, tourism. However, a separate study by Marowa and Matanzima (2022) argues that the Tonga people, who were displaced by the creation of the lake, have been granted little access to it, as much of the waterscape is now part of a national park managed by Zimbabwe's Department of National Parks and Wildlife Management (DNPWM).

Several deliberate programmes and policies have been adopted in Southern African countries such as Botswana, Namibia, Zambia, and Zimbabwe to involve local communities in tourism. Botswana adopted the Community-Based Natural Resource Management (CBNRM) initiative (Mbaiwa &

Stronza, 2010); Namibia implemented the Communal Conservancy Programme (CCP) (Ogbaharya, 2006); Zambia established the Administrative Management Design for Game Management Areas (ADMAGE) (Bwalya Umar & Kapembwa, 2020); and Zimbabwe pioneered the Communal Areas Management Programme for Indigenous Resources (CAMPFIRE) (Shereni & Chambwe, 2024). While these programmes support the sustainable management of tourism resources and aim to ensure equitable benefit-sharing among communities, they have not explicitly targeted the promotion of water resources in rural tourism development.

With the rising demand for tourism that offers authentic experiences, it is essential for water and tourism stakeholders to encourage governments to advance the development of water tourism in rural areas, particularly as a means of economic diversification, community development, and a potential solution to poverty.

CONCLUSIONS

This paper set out to establish the role water resources play in developing rural tourism in rural areas. At the outset, the attitudes and perceptions of rural communities toward water were explored. In summary, rural communities perceive water as a resource for both physiological and socio-economic needs. What stands out most is how their engagement with water-based leisure and adventure activities is hindered by intergenerational fears of large water bodies, owing to myths and legends.

This study further submits that the relationship between water and tourism is reciprocal and mutually beneficial. Water resources play a pivotal role in developing rural tourism as a platform for community upliftment and poverty alleviation. Conversely, tourism development has the potential to propose, support, and enhance water management systems by promoting sustainable water practices. The paper also highlights that rural communities possess key assets, particularly pristine natural environments and water resources, that are increasingly in demand for tourism. There is a pressing need for rural communities, supported by government and various interest organisations, to tap into this market and realise its socio-economic and environmental benefits.

This study makes both theoretical and practical contributions. Theoretically, it contributes to three main areas of literature: first, rural communities' attitudes and perceptions toward water resources and how these influence their engagement with tourism; second, the ways in which rural communities can be diversified and developed through water-based tourism in pursuit of the Sustainable Development Goals (SDGs); and third, how tourism can serve as a tool to enhance water quality and management practices. Addressing the interconnected challenges of water management, rural development, climate-resilient agriculture, and food system transformation requires collaborative and harmonised efforts among sectors and stakeholders to improve the stewardship of land and water resources.

On the practical front, this study underscores the need to shift rural communities' perceptions of water resources from a solely subsistence-oriented view to one that also recognises their potential for tourism and socio-economic development. By understanding and addressing the myths and fears surrounding water bodies, stakeholders can develop targeted awareness and education programmes

that promote the benefits of water-based tourism. Furthermore, this paper posits that rural communities can diversify their economies and generate new income streams by incorporating water resources into tourism strategies, thereby contributing to the achievement of SDG 1 (No Poverty) and SDG 2 (Zero Hunger).

While this study highlights the potential of water-based tourism as a tool for rural development in Sub-Saharan Africa, it has several limitations. As a theoretical review, it lacks empirical data on community perceptions and economic impacts, and its reliance on existing literature may overlook regional variations and recent global disruptions such as climate change and post-pandemic tourism trends. Additionally, it does not fully explore structural barriers, such as infrastructure deficits or policy gaps, that could hinder implementation. Future research should adopt empirical approaches, including case studies and stakeholder interviews, to address these gaps and assess local attitudes, economic benefits, and challenges. Further studies could also examine climate resilience, community-led tourism models, policy frameworks, and the role of technology in promoting sustainable water tourism. By focusing on these areas, researchers can offer actionable insights for leveraging water resources to alleviate poverty and diversify rural economies, while respecting cultural and environmental contexts.

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Overtourism in Cape Town: Local Stakeholder Perspectives

ABSTRACT

Over the past three decades tourism geographers have engaged increasingly with issues of urban tourism and overtourism. The mass of urban tourism scholarship and writings about overtourism concerns cities in the Global North. The novel contribution of this study is documenting evidence of emergent overtourism and the rise of resident discontent in the context of a major urban tourism destination in the Global South, namely Cape Town. The case study scrutinized is of tourism impacts and stakeholder perspectives of the historic inner-city neighbourhood of Bo-Kaap where 22 detailed stakeholder interviews were conducted. The Bo-Kaap manifests the hallmarks of overtourism as documented in several European cities. Touristification is modifying the local residential and business landscape for tourist consumption with the consequence that residents of the neighbourhood are alienated as the space becomes difficult to live in. The findings reveal significant levels of anti-tourist sentiment in the Bo-Kaap which stem from concerns about the local nuisances of tourism expansion and perceived lack of benefits for the neighbourhood. Arguably, critical policy and management challenges confront the City of Cape Town in respect of current directions of tourism development in the Bo-Kaap neighbourhood.

Keywords: Cape Town, overtourism, resident protest, stakeholder perspectives, urban tourism

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INTRODUCTION

As Lörincz et al. (2025, p. 162) point out “throughout history, cities have always been popular destinations for economic, transport, commercial, or strategic reasons, as well as for the cultural and artistic values they offer”. Large cities are significant tourism destinations attracting visitors for different purposes, including leisure, business, health and for visiting friends and relatives (VFR) (Law, 1993; Morrison & Coca-Stefaniak, 2021; Rogerson & Rogerson, 2021a). Within tourism space economies urban places are critical vibrant destinations because of the variety of their tourism assets as well as diverse characteristics (Law, 1996; Morrison & Maxim, 2022). In addition to their large populations which generate substantial VFR travel mobilities, cities boast concentrations of entertainment, leisure, culture, heritage, sports and shopping attractions. According to Maxim (2024, p. 1) the recent worldwide boom in urban tourism has been catalysed by several factors. These include changing work patterns, higher disposable incomes, infrastructure improvements, and the multiple offerings of city destinations. Other factors are the innovation of new smart technologies as well as the role of low-cost airlines which have facilitated city breaks (Vujko et al., 2025). Globally, large city tourism destinations - viewed as crowded places - were severely impacted by COVID-19. Nevertheless, the international record points to a post-pandemic recovery with the reopening of borders and a re-ignition of flows of urban tourists (Amore & Adie, 2021; Maxim, 2024; Wasudawan & Weissmann, 2025).

Undoubtedly, urban tourism represents “one of the most dynamically developing forms of tourism and, in many cases, one of the most important drivers of economic growth” (Panasiuk, 2019, p. 14). Until the 1980s, however, scholarly research on urban tourism was sparse (Page & Duignan, 2023). Only during the 1980s and 1990s did urban tourism appear as a significant and distinctive field of scholarship (Law, 1993, 1996; Novy, 2011). Despite the growth of cities as tourism destinations, for many years urban tourism was an overlooked dimension of tourism studies which was dominated by research on rural spaces or resorts (Nilsson, 2024). Cities were considered mostly as generating sites rather than as reception areas in tourism systems. Over the past three decades attitudes towards urban tourism have changed. There has been a burst of innovative research concerning various dimensions of urban tourism and including significant contributions from tourism geographers (Rogerson & Rogerson, 2021a; Duignan & Pappalepore, 2023; Page & Duignan, 2023; Stalmirska, 2023; Stalmirska & Ali, 2025). This rising academic interest is accounted for not only by the expansion of urban tourism *per se* but also from an acknowledgement of its cultural, economic and social significance and most especially its important ramifications for local livelihoods and urban economic development (Larsen, 2019; Nilsson, 2024).

Maitland and Newman (2009, p. 1) assert that “urban tourism has been an inseparable part of the transformation of many cities over the past several decades”. Using an economic geography lens Romão (2025) positions tourism as a vital catalyst of economic and urban change. Attention is directed at the linkages of urban tourism to gentrification and social conflicts. ‘Touristification’ occurs when tourism becomes the predominant local activity, precipitating changes in urban spaces, especially the complexion of certain physical urban environments with severe impacts often for housing prices as

well as for residents' quality of life (Cocola-Gant, 2018; Larsen, 2019). As leisure tourism overtook city spaces it has therefore become a topic of policy concern and an element in strategic spatial planning (Duignan & Pappalepore, 2023). Critically, tourism development was propelled onto the urban agenda by its transformative impacts in cities, including gentrification and the appearance of resident protests around 'overtourism' (Colomb & Novy, 2016; Novy & Colomb, 2019; Amore et al., 2020; Milano et al., 2020; Horn & Visser, 2023; Koens & Milano, 2024; Nieuwland et al., 2025; Tena et al., 2025). Such developments occurred as reaction to a broader policy environment within which tourism "has been a central component of the worldwide process of neoliberalization" and, in many cities, local tourism policies have been progressively neoliberalized (Fletcher, 2025, p. 466).

Arguably, the mass of urban tourism scholarship currently surrounds city destinations in the Global North (Page & Duignan, 2023). Nevertheless, examining the 'other half' of urban tourism, namely that occurring in the Global South, it is evident many prominent examples exist of cities in Asia (Bangkok, Ho Chi Minh City, Kuala Lumpur, Mumbai, Phuket) and Latin America (Buenos Aires, Lima, Rio de Janeiro) which are significant leisure tourism hubs (Rogerson & Rogerson, 2021a). Across the global map of urban tourism, the region of sub-Saharan Africa is distinctive because of the greater relative significance of business tourism (formal and informal) as a driver for tourism expansion. Indeed, for Addis Ababa, Harare, Nairobi and even Johannesburg the key drivers for urban tourism are business or MICE (meetings, incentives, conferences, exhibitions) tourism rather than traditional leisure tourism (Rogerson, 2018; Rogerson & Rogerson, 2021b; Makoni & Rogerson, 2023).

One striking exception is, however, the city of Cape Town. Under apartheid (1948-1991) international tourist flows to the city were limited, being negatively impacted by boycotts because of South Africa's racial policies and of the racialized character of tourism spaces (Rogerson & Rogerson, 2025). In the post-apartheid (after 1994) period following the dropping of international sanctions and South Africa's reintegration into the global tourism economy, Cape Town's extraordinary natural beauty and attractions made it a bucket-list place to visit for long haul international leisure tourists coming from Europe, North America and increasingly from Asia (Rogerson & Rogerson, 2019). Using indicators of tourism spend Cape Town is South Africa's leading destination accounting for nearly 16 per cent of the national total of value (Rogerson & Rogerson, 2021c). Following the period of COVID-19 impacts and decline, the city's tourism economy rebooted rapidly (Rogerson & Rogerson, 2022; Chetty & Visser, 2025). New direct flights routes to Cape Town from the USA recently have opened. Changes in tourism seasons in part due to climate change have seen an upturn in visitors from China and India. A further trigger for visitor expansion is the increase in cruise liners docking at Cape Town.

The novel contribution of this paper is to interrogate the accelerating concerns in Cape Town about 'overtourism' with a focus on residents and stakeholders of the inner-city neighbourhood of Bo-Kaap. This discussion is situated against the backdrop of the global expansion in the importance of urban tourism, concerns surrounding the impacts of tourism in cities in the Global North, and significant contributions to scholarship by tourism geographers. The study represents the first detailed investigation of overtourism emerging in a city of the Global South. Three further sections of discussion are given. The next section locates the experience of Cape Town within a review of the burgeoning international literature and debates around overtourism. Following a brief discussion of

methodology, the results are presented concerning stakeholder perspectives of tourism development which is occurring in the Bo-Kaap.

LITERATURE REVIEW

According to Kuščer and Mihalič (2019) the term ‘overtourism’ was coined by Rafat Ali the founder and CEO of Skift tourism intelligence platform, during a study on Iceland’s fast-growing tourism economy. The terminology of ‘overtourism’ was popularized in 2017 as part of mounting concern around tourism excesses (Milano & Koens, 2022). It was observed that media embraced the term overtourism because of its appeal to “people’s basic instincts” and “an element of alarm and fear in it” (Mihalič, 2020, p. 2). This said, it has been argued that in certain respects ‘overtourism’ is not a recent phenomenon because as Sharpley (2020, p. 1940) asserts it “can be considered to be, in some respects, simply a new term for an old phenomenon.” Overtourism debates build upon a long tradition of critiques concerning the myriad negative impacts of conventional mass tourism development.

For Žemla (2020) the initial conceptualization of overtourism was blurred and urban scholars struggled for a commonly-accepted definition. Back et al. (2025, p. 294) opine that whilst overtourism manifests several definitions, it is essentially “a concept that addresses the deterioration of places, experiences and quality of life caused by tourism”. For Koens et al. (2018, p. 9) it can be viewed as “a social problem within a city context”. Consensus exists that overtourism occurs when tourism growth exceeds limits and triggers resentment of tourism (Koens et al., 2018; Milano et al., 2019; Mihalič & Kuščer, 2022; Dodds & Butler, 2024; González-Reverté & Guix, 2024). Barač-Miftarević (2023, p. 179) contends overtourism is “when locals feel that their way of life is disappearing due to tourism” and precipitates “resistance to tourism as a whole, to tourists, decision-makers (all levels of government), and economic entities in the destination”. In a similar manner Pai et al. (2024, p. 796) aver that “When the number of tourists in a destination affects the quality of life of local residents, or the deterioration of the experience exceeds the wishes of local residents over-tourism will affect the social sustainability of the interaction between residents and tourists”. The growth of the sharing economy and of short-term rentals represents a closely overlapping phenomenon with debates around ‘overtourism’ (Moreno-Gil & Coca-Stefaniak, 2020).

Tracing the discourse on overtourism the literature discloses that its causes are multiple, complex and somewhat ambivalent (Balliu & Zbucha, 2025). At one level overtourism is undoubtedly the consequence of uncontrolled development and the absence of good management and planning (Koens et al., 2018). Academic debates surrounding ‘overtourism’ and ‘tourismphobia’ burgeoned across the experience of many European cities including Amsterdam, Barcelona, Berlin, Dubrovnik, Florence, Granada, Krakow, Lisbon, Ljubljana, London, Paris, Seville and Venice (Kuščer & Mihalič, 2019; Milano et al., 2019; Diaz-Parra & Jover, 2021; Pasquinelli & Trunfio 2020; Pechlaner et al., 2020; Barač-Miftarević, 2023). Unquestionably, the unplanned occurrence of overtourism in these and other popular urban destinations is a byproduct of “unregulated capital accumulation and growth strategies heavily associated with selling cities as tourism commodities” (Milano et al., 2019, p. 1857).

A boom in urban tourism often “brings gentrification, leading to property speculation, contributing to the displacement of residents, and impacting the authenticity and social cohesion of historic and emblematic neighbourhoods (Graça et al., 2025, p. 150). In addition, overtourism creates particular challenges for heritage and the conservation of historic neighbourhoods of European cities (Amore et al., 2020; Dodds & Butler, 2024; Alonso, 2025; Graça et al., 2025).

With negative impacts perceived by residents from overtourism common responses have been organized anti-tourist protests (Milano et al., 2019; González-Reverté & Guix, 2024; Graça et al., 2025). It is evident that a tide of local protest and resistance occurs sometimes against the growth of tourism as a whole and of its negative ramifications for residents. In other instances, protest and resistance is triggered against the expansion of specific forms of tourism which are contested or deplored (Colomb & Novy 2016; Back et al., 2025). Overall, Novy and Colomb (2019) attribute this ‘politicisation from below’ as resulting from the impacts of the visitor economy on urban places as well as both the *quantitative* and *qualitative* transformation of urban tourism in recent years. The shifting spatialities of tourism flows in and across city spaces are acknowledged also as a determining factor for residents protesting their alienation from tourism (Rogerson & Rogerson, 2021a; Rogerson et al., 2024). As highlighted by Milano et al. (2024, p. 1313) for the past half-century “neoliberal tourist development plans have been widely prioritized, indistinctively exploiting local resources and spaces for corporate profit”. Under the sway of neo-liberal planning, capital-driven gentrification represents the *modus operandi* of urban growth coalitions. In an important intervention Milano et al. (2024, p. 1318) (re-)conceptualize overtourism as a ‘regime’, meaning “a complex and deeply entrenched system that exerts control over urban landscapes, economies and social dynamics in which tourism economics start to be the main source of income, transforming cities into perpetual holiday destinations”. Specifically, the regime of overtourism can be understood as a multifaceted and self-perpetuating system, that prioritizes economic growth through mass tourism and a visitor economy which is gradually replacing existing economic activities (Milano et al., 2024).

As an aspect of urban tourism, in recent years research concerning overtourism has “increased exponentially” (Back et al., 2025, p. 295). This is documented by the appearance of several recent systematic and bibliographic reviews which identify that the literature on ‘overtourism’ has recorded remarkable growth for urban destinations in the Global North (Veríssimo et al., 2020; Barač-Miftarević, 2023; Santos-Rojo et al., 2023; Back et al., 2025; Dilshan & Nakabasami, 2025; Tamang & Mallick, 2025; Wasudawan & Weissmann, 2025). Most peer-reviewed research on overtourism emerged only as recently as 2018 (Back et al., 2025). Largely, research on overtourism is set within European city contexts albeit recent additions to the literature include at least one non-European case, namely of Kyoto, Japan. Here, Burtis and Wise (2025) interrogate its social, environmental and economic impact upon local communities.

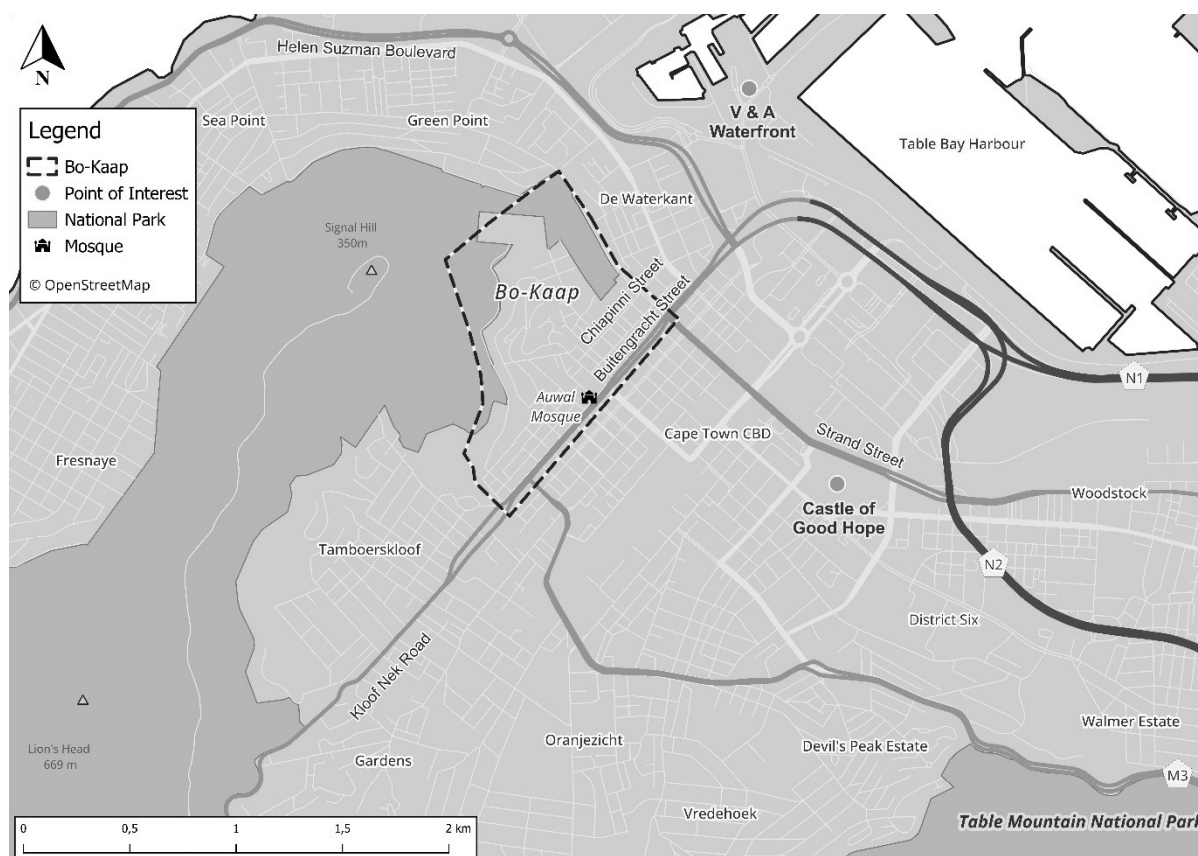
Overall, within the existing body of overtourism literature Back et al. (2025) isolate six key clusters of research. First, is the unpacking of the complex effects of overtourism at local level. Second, is the impact of the sharing economy and short-term rentals on the urban accommodation and property landscape (Moreno-Gil & Coca-Stefaniak, 2020). The third cluster encompasses “research investigating locals’ reactions to overtourism and how tourism affects their everyday lives” (Back et

al., 2025, p. 300). Four, is the impacts of climate change and issues of heritage management. Most especially, researchers have directed concerns about how overtourism impacts city destinations with high cultural and heritage values. Five, is a critical literature on ‘degrowing’ urban tourism and searching for alternatives to the neoliberal model of urban planning and governance. The final group of research works are policy-centred and examine a range of issues around stakeholder perceptions surrounding tourism and of policies addressing overtourism.

METHODS

The case study under scrutiny is of tourism impacts and stakeholder perspectives concerning the Bo-Kaap neighbourhood in Cape Town, South Africa. The use of a single case study often is applied in ‘exploratory studies’ as it seeks to determine the case and key factors (Mouton, 2001). As is pinpointed by Swedberg (2020, p. 16) exploratory studies are devised “to place ourselves within a context of discovery rather than a context of proof”. The approach is inductive, atheoretical and no hypothesis is formulated; rather, a ‘general idea’ guides the empirical research. High construct validity along with in-depth insights and establishing rapport with participants are considered its strengths. By adopting this approach, the task is to provide an in-depth description of the Bo-Kaap case situated in the everyday life-worlds of the actors being studied and thus to generate ‘insider perspectives’ (Mouton, 2001).

Figure 1. The Location of Bo-Kaap in Cape Town Inner-city



Source: Authors

The Bo-Kaap is situated in Cape Town inner-city below the slopes of Signal Hill (Figure 1). This historical settlement was originally built in the 1790s for European artisans and traders and subsequently became a slave quarter of mixed populations upon their emancipation in 1838 (Pistorius, 1994; Kotze, 2013). Colonial rule, global geopolitics and apartheid have shaped and re-shaped the neighbourhood over time (Jessa, 2025). Under apartheid the neighbourhood was formally declared a 'Malay' area in 1957; it constituted the oldest 'non-white' inner-city suburb in South Africa. The contemporary area of Bo-Kaap hosts several heritage sites of national significance and represents a microcosm of 'Cape Coloured' and Muslim culture where socio-religious practices remain demonstrable (Donaldson et al., 2013). This inner-city precinct of Cape Town is the city's foremost cultural tourism asset. For tourists it is distinguished by its vibrant coloured houses, cobblestone streets, and religious culture. The neighbourhood contains the largest concentration of pre-1850s colonial architecture in South Africa making an important contribution to the country's architectural heritage (Pistorius, 1994). The tourist hub and geographical core of Bo-Kaap is situated around Wale, Chiapinni and Rose Streets.

For this investigation 22 semi-structured interviews with various role players and stakeholders were conducted in Cape Town during 2023–2024. These semi-structured interviews were based around broad questions, topics and themes (Bless & Higson-Smith, 2000). Respondents were encouraged to talk about a topic freely, and care was taken to avoid leading (Leedy & Ormrod, 2010). The duration of interviews varied between 45 minutes and three hours dependent on the respondent's knowledge of the topic, availability, and willingness to engage with the subject matter. Purposeful sampling allowed for the targeting of participants whose roles often overlapped.

Table 1 lists the respondents and their roles. The interviewed stakeholders included long-term residents, tour guides, lawyers, museum employees, members of local civic organisations, local authority and provincial government. Broad neighbourhood development and policy aspects, together with specific local concerns were discussed with the ward councillor. Aspects of heritage conservation were addressed by respondents from the local authority and civic administrators, heritage practitioners and academics. Tourism development issues were interrogated with tourism managers both at the City of Cape Town and the provincial Western Cape Department of Tourism and Economic Development. Residents and civics provided their perspectives on gentrification and its displacement effects, overtourism, and threats to heritage. The information derived from interviews was collated to determine points of coherence and agreement within community structures. Further evidence of resident views towards local tourism development was obtained through examining Facebook posts.

Ethical considerations were a central aspect of the research design and decision-making processes throughout the project. Given the high media profile of the Bo-Kaap and sensitivity of the research topic, care was taken to conduct the study responsibly. Participants were encouraged to openly reveal their opinions. Informed consent was obtained via email or for some residents, via WhatsApp, or Facebook Messenger. In reporting the findings, the names of participants are omitted to protect participants from potential harm. A full account of data collection procedures, selection of respondents and ethical issues is provided by Jessa (2025).

Table 1: List of Stakeholder Respondents and their Roles

Respondent	Description	Interview Date
A	Ex resident, Bo-Kaap tour guide	26.03.2024
B	Elderly resident of Chiapinni Street	02.03.2024
C	Resident activist and founder of the Bo-Kaap Tourism Association (BTA), resident site guide	24.10.2023
D	Resident activist, BTA founder	22.10.2023
E	Lawyer, Activist, resident, Member of Bo-Kaap Residents Association (BOCRA)	12.02.2024
F	Ward Councillor	20.09.2023
G	Tourism Planning Director, City of Cape Town	18.12.2023
H	Tourism Planning Official, Western Cape Provincial Government	16.03.2024
I	Heritage Planner, City of Cape Town	31.01.2024
J	Heritage Planner, City of Cape Town	31.01.2024
K	Heritage Consultant/ Academic	22.02.2024
L	Heritage Academic/ Mosque board member/ Salt River Heritage Association Member	12.02.2024
M	Elderly resident/ Student Host Chiapinni Street	17.02.2024
N	Resident Tour operator/ Site Guide/ member of BOCRA and BTA	05.02.2023
O	Resident adjacent to informal settlement, home storyteller host, tour guide	24.02.2024
P	Resident, Founder of Bo-Kaap Rise; Business developer; Female Youth Movement member	24.01.2023
Q	Lawyer, Radio host, Curator of local Cape Muslim Slave & Heritage Museum	11.07.2023
R	Long term elderly resident, recently relocated to Northern Suburbs of Cape Town	22.02.2023
S	Bo-Kaap Museum Employee	08.11.2023
T	Long term resident of the informal settlement	21.02.2024
U	Resident of Chiapinni Street	22.03.2024
X	Resident of Dorp Street	07.06.2023

RESULTS

In the post-apartheid period the Bo-Kaap neighbourhood has been experiencing intensifying neighbourhood change (Donaldson et al., 2013; Kotze, 2013; Todeschini & Japha, 2024). Together, expansive economic policies, large-scale urban construction projects and unregulated tourism growth are reshaping the Bo-Kaap community at a physical and human scale (Jessa, 2025). Gentrification and touristification are exerting severe displacement effects, disrupting community life and threatening local cultural heritage (Jessa & Rogerson, 2025). An uneven pattern of development reinforces spatial divisions in the area, a reminder of the historical legacy of exclusion and othering under both colonial rule and apartheid. Currently more than half the population of the Bo-Kaap reside in overcrowded conditions or in informal settlements.

The results from interviews with local stakeholders are organized into two sub-sections of discussion. The first documents the city of Cape Town's neo-liberal pro-growth policies and the advance of tourism gentrification in an urban African setting (cf. Horn & Visser, 2023). The second

turns to controversies about tourism impacts in the Bo-Kaap, resident concerns and the growth of anti-tourism sentiment.

Stakeholder Perspectives: Tourism Gentrification and Neighbourhood Change

Although tourism is a significant driver of neighbourhood change in the Bo-Kaap, this has gone unacknowledged by city and provincial authorities. Moreover, it has not been accorded serious consideration in Cape Town city development frameworks. Indeed, the Cape Town record of tourism planning essentially illustrates the observation made by Paddison and Hall (2024, p. 1) that “tourism policy tends to focus on economic priorities, with little concern shown for addressing the wider impacts of tourism”. The stakeholder interviews disclose that tourism in the Bo-Kaap is identified as a key sector for the local economy, at grassroots levels and for achieving broader economic development goals. This said, tourism development is characterized currently as chaotic and poorly managed.

Residents feel their needs are dismissed, and a resultant sense of loss of control is expressed. As the intensity of tourism increases, so too do negative impacts. The results point to the city authorities lack of responsiveness to key community demands. Bo-Kaap residents therefore castigate the city’s policies for being anaemic and failing to address the local negative impacts of tourism. The findings confirm that a growth focus dominates the City of Cape Town’s development approach. The primary mandate is for economic development and job creation. Despite an acknowledgement of the negative impacts experienced from tourism, these are relegated in favour of quantitative growth.

Respondent J: *For Cape Town, tourism is the goose that laid the golden egg.*

Respondent D: *The City Council sees tourism as a means to an end in itself. The greater the footfall, the more money they make.*

Respondent F: *When considering tourism as a driver of gentrification... the focus for me is to create jobs, this is imperative, and tourism is a major driver... We can’t deny that the Bo-Kaap is part of the CBD, is part of the city and the Bo-Kaap is a huge attraction.... Even if benefits don’t reach the community directly, it doesn’t mean it isn’t benefitting the city. These guests have to stay in hotels and visit other attractions too, so they are contributing.*

Respondent H: *It is the Provincial government’s primary objective to grow jobs and the economy through tourism. This is integrated into much of the city’s planning and thinking. Tourism is one of the few growth sectors, seen as low hanging fruit, and is leveraged to address development goals.*

Overall, while some residents understood the motivations behind the city’s growth-centred approach, they contest the lack of collaborative efforts and claim the city authorities are underhanded and unfairly competitive.

Respondent C: *We say, we get what you want to do. Look don’t be so sly about it. It’s cool. We know, you as a city need to increase revenue and compete in the world economy and all that. But we are your best partners to partner up with!*

Although there is no dispute as to the visitor marketability of the Bo-Kaap, divergent opinions were expressed on factors boosting the area's increasing popularity. Certain respondents contended the Bo-Kaap is 'sold' worldwide via targeted marketing campaigns and residents bear the cost of increasing tourist numbers, a situation largely outside of their control. Some respondents believe that the marketing (and increasing visitor numbers) of the Bo-Kaap has evolved a life of its own as a result of social media. Another suggested that visitor numbers have been driven by media campaigns by the city and tourism authorities.

Respondent C: *When you come off international arrivals at Cape Town airport - Boom, you see a Bo-Kaap ad. What does it tell you? The city is sending people to explore. The Cape Town Tourism website showcases the Bo-Kaap as its number one cultural destination. In fact, the City of Cape Town cannot be promoted anywhere worldwide without them using an image of Bo-Kaap. The message is that you've got to go to Bo-Kaap as a tourist.*

Respondent F: *Whether the City pushed the image of Bo-Kaap or not you would find its picture on Instagram and international travel magazines in much the same way as other destination experiences such as the Sydney Opera House. It is something that happens organically.*

The Bo-Kaap forms an inseparable part of the Cape Town tourism product offering. The neighbourhood usually is included on scheduled city tour itineraries with other 'must-see' attractions such as Table Mountain and the Victoria and Alfred waterfront development. Private walking tours that include visits to residents' homes are booked via independent travellers either directly or through tour agencies which offer the Bo-Kaap as a 'cultural experience' rather than as brief photo-stop. In addition, the area is a popular film set for both local and international advertisements. In response to Israel's invasion of Gaza many residents crafted distinctive pro-Palestine images on their homes designed to raise international awareness of the genocide taking place. The intent, as expressed by residents, was to have a Palestinian flag on every tourist social media post made of the Bo-Kaap.

Several respondents felt tourism was exclusionary to some groups in the area, most notably the residents of the informal settlement of Schotchkloof Flats. Others identified the exclusionary loss of community as experienced due to increased tourism activity.

Respondent A: *Honestly, I think that other than the erosion of culture and communal spirituality, there is no question that another one of the direct consequences of tourism, is people are being excluded.*

Respondent K: *Especially around the heritage trail they are proposing. They continue to create privilege. So depending on where you live ...some segments will be well-resourced and sustainable and others not, or will require capital injection, that may not build sustainability.*

It was recognized that tourism by its very nature was exclusionary. Several respondents decried the tourist-centric development view of the city authorities and instead argued the case for adopting a resident-centred approach that might ensure greater benefits for future generations of Bo-Kaap residents.

Respondent H: *It's the nature of tourism that benefits would be unequally distributed. This is a global issue. How many people in the community have adopted tourism?*

Respondent C: *I would like my kids to grow up and at least have some chance of doing the same job that I did in Bo-Kaap so they can participate in the economy of teaching that narrative to guests in the form of tours which they earn a living from.*

A strong theme among stakeholders was of the imperative for developing the Bo-Kaap first for the benefit of residents and locals. This stance was exemplified by the following statements from heritage consultants and a representative of the Bo-Kaap Tourism Association.

Respondent K: *If you develop the City for tourists, its fake - Disneyfied. You need to keep on chucking resources at the development. It creates untold conflict with locals. Absolutely...but also to keep the myths going, because what you're doing with that is taking the little that you know and packaging it as a tourism product. In the meantime the community is living their lives and then it becomes a whole performance of identity thing.*

Respondent D: *Develop products in the Flats- According to what I would consider what attracts a tourist? So I put myself back in the shoes of the tourist. We don't want the same shops you can find overseas, the same brands everywhere. They want to go into communities and want to see the story of the Bo-Kaap and the townships, the fisherman and so on, allow us in! Have the privilege to enter into people's homes and be enthralled and fascinated by the story that they've got to tell me, and it etches in the stone of my memory, a story which is rich which is powerful. Sure, you get tourists who just want the surface stuff but I think people don't want to say they went to Starbucks in Cape Town!*

Most respondents agreed the adoption of tourism by residents would progressively continue as a driver of neighbourhood change, particularly as alternative local economic opportunities are limited. At least one respondent rejected 'self-gentrification', arguing that if the predominant form of ownership is local, communities could find a pathway to prosperity through tourism, and this would be a positive outcome rather than gentrification.

Respondent C: *I think there are more people coming into the fold of realizing that economic empowerment is the only way out, or is the only way in, you know and to remain here, and tourism is that vehicle. But we are still trying to establish a more primary mindset of 'I need to empower myself'. The obvious or the easiest option is right in front of us. It is tourism.*

Respondent E: *If they're predicting that (communities will self-gentrify), then I'm saying let those guest houses and restaurants be in the names of our people and bless them...My issue is this. If our people benefit, it's not gentrification. It's a natural phenomenon of economic development. Bo-Kaap is not always gonna' stay the way it is, but keep the working class, take them on the tourism journey, don't leave them behind.*

Stakeholder Perspectives: Tourism Impacts and Resident Concerns

The ‘touristification’ of the Bo-Kaap is most in evidence around the core intersection of Wale and Chiapinni Street (Jessa & Rogerson, 2025). On a daily basis from 8am this space becomes busy with tourists and congested with traffic, most especially from tourist coaches (Figure 2). As a consequence of the expansion of tourism around this hub where formerly there were homes, residents have been displaced. Tourism gentrification has resulted in homes being replaced by a mixture of art shops, curio sellers, restaurants as well as home-based tourism offerings (Figures 3–4).

Figure 2. Stream of Large Coaches in Wale Street (Image, Sirhan Jessa, 11.10.2023)



Figure 3. Art Gallery and Curio Seller, Wale & Chiapinni Street (Image, Sirhan Jessa, 10.11.2024)



During 2018 resident dissatisfaction burst into the open. With unregulated tourism disrupting everyday life in the area and the City of Cape Town’s approval of large-scale property developments Bo-Kaap protestors burned tyres and blocked the entrance to the heritage precinct. Entry was refused both to

tour coaches and construction vehicles (Jessa, 2025). The research interviews conducted in 2023-2024 disclosed continued and significant levels of local resentment towards tourism and its impacts in the precinct.

Figure 4. Photographic Gallery and Art Shop in Wale Street (Image, Sirhan Jessa, 10.11.2024)



Resident complaints largely focused on the nuisance generated by inadequate traffic management (especially tour coaches and shuttles in Wale Street), unruly tourist behaviour, the inconvenience imposed by film crews and filming permits granted by city authorities, and the lack of direct economic benefits to the community from substantial levels of tourist activity. The community is attentive to concerns about overtourism and extremely resentful at the City of Cape Town's abdication of responsibility and lack of policy action. Respondents expressed feelings of loss of control, despondency and of reaching a psychological breaking point.

Respondent A: *Tourism (in the Bo-Kaap) is a mess. The City doesn't want to acknowledge it!*

Respondent C: *It's not being addressed in any of the policies, any of the initiatives that the City are rolling out. There is absolutely no meaningful long-term plan for tourism in the area. Everyone is asking questions that are always to do with the same thing ie. tourism. It is something that is a big elephant in the room and in most cases it's not being addressed.*

Although City officials acknowledged the undesirable impacts of excessive tourism, the challenges of curtailing tourism growth were highlighted:

Respondent F: *...but I am concerned- overtourism is being experienced, and all over the world! There is a fine line and finding that balance and protecting our communities so that do not feel over-exposed or taken advantage of. Commodifying our history, our culture and those things that make us unique is what attracts tourists so it is important that we preserve that.*

Respondent H: *It (anti-tourist sentiment) is a global challenge. Tourism plays a big role in job creation; this is the ultimate aim. But we do realise that there are social, economic and environmental impacts such as gentrification. There has been a concern around gentrification and of*

course tourism does play a role in that. It just becomes expensive for locals. We are committed to sustainable tourism development, but are aware of the concerns.... The main directive is to grow the economy. Tourism is a primary thrust of government.

Respondent J: I was shocked at the section around Atlas spice shop. It's become so fake and horrible. Masses of tourists get dropped off, I couldn't even shop for spices there anymore, so I just left.

Figure 5. Tourists Visiting Atlas, South Africa's Oldest Spice Shop (Image, Sirhan Jessa, 10.10.2023)



Figure 5 illustrates the impact of tourism on established businesses in Bo-Kaap with the example of the oldest spice shop in the country. Seemingly, City of Cape Town officials are ambivalent towards the negative impacts of excessive tourism and explained that a ‘balanced approach’ to tourism development required compromise by Bo-Kaap residents. The following comments illustrate the opposing positions of city authorities versus residents who expressed a sense of powerless in dealing with tourism’s disruption of everyday life in the area.

Respondent G: To the lady living in Chiapinni Street, she has to unfortunately try to deal with the increasing tourist numbers in a mature way realising that her fellow community members are receiving a livelihood from these tourists. Respectful interactions with neighbours are important.

Respondent R: I am used to it but I wish that for one morning I could sleep late especially on the weekend. I can't even sit outside and enjoy the morning because from early in the day I have to hear these loud foreign voices outside my door. They have no consideration and even come up on to my stoep. I wish there was just one day break that, just one day when there are no tourists, and I can have a peaceful morning.

Respondent B: What can I do? I have to make peace with it, it's a nuisance but there is nothing I can do.

Respondent P: *(Pre- Covid) I was living in Bo Kaap. My family home is there. I used to hang out at friend's place on the corner of Wale and Rose street. We observed it becoming progressively busier. Over time I just noticed how intense the tourism was becoming. I guess my anger, frustration and concern grew.*

It was evidenced that elderly residents of the tourist hub of Chiapinni Street find it especially difficult to cope with the incessant droves of tourists in the neighbourhood's narrow streets and the regular professional photoshoots offered on Airbnb Experiences. For Bo-Kaap residents, tourism has become an overwhelming burden with little means, or hope to improve the situation. Tourist activity continues to expand as indicated by the continuous flow of bookings for walking excursions, food tours and the daily trail of coaches and tourist shuttles frequenting the area (see Figure 6).

Figure 6. Typical Traffic Congestion in Wale Street (Image, Sirhan Jessa, 11.10.2023)



Unfettered growth fuels continued resident frustration, as the balancing costs and benefits of tourism, and of keeping all interest groups satisfied becomes an ever more difficult challenge for Cape Town city authorities. With the regular stream of tourist coaches and shuttles entering the neighbourhood, the urgency for improved traffic management emerged as a strong driver of negative resident sentiment toward tourism (Figure 6). Residents feel their repeated requests for a solution have been dismissed. The frustration at the intensity of traffic, disregard for rules, increased pollution, and danger to pedestrians was highlighted by resident respondents as well as in Facebook comments and responses. The absence of a co-conceived, coherent traffic management plan underscores the City's inability to address the issue meaningfully. In particular, the large coach or bus services are identified as major causes of congestion.

Respondent C: *Bus drivers have the attitude of they bring tourists here so you must be happy. Never mind them blocking the parking areas and causing congestion in Wale Street.*

Respondent E: *The carbon footprint, buses and taxis and everything you know coming into the area and so the traffic damages the cobblestones. Many residents have asthma from all the pollution. As residents we need regulation for this.*

Respondent F: *Those big tour buses frustrate me that come and park in the middle of Wale Street, block traffic, don't adhere to parking rules, and drop off hordes of tourists who stand in the middle of the road and don't spend money at local businesses.*

Several noise complaints relating to unruly tourists were posted on the Facebook community forum. Respondents flagged the need for a tourist code of conduct and the education of tourists about appropriate local behaviour. One official (tourism) response, however, was that residents should compromise as they themselves could be equally noisy during cultural practices for a local carnival.

Respondent G: *Remember it's not just foreigners who make a noise, while they may party some nights, other nights it is community members making a noise such as late-night practicing of the klopse [minstrel] troupes.*

Respondent A: *Selective hearing is employed when comes to noise as no complaints are made when the klopse is practicing or when there are other community events. Those who live on Wale Street have chosen to live on a main road. Tourism benefits the community. These residents have no right to tell tour guides to be quiet.*

Generally, it is evidenced that Bo-Kaap residents express discontent and frustration at the poor management of tourism. Several tour guides experienced some degree of aggression from residents, ranging from leers and dirty looks to direct comments. Resident suggestions to oppose tourism included re-painting white all the multi-coloured houses of Bo-Kaap, spraying tourists with water sprinklers, charging for photographs, and erecting signage asking tourists to be quiet. The growth of youth crime and pickpocketing of tourists also was raised. Reference was made in interviews to the anti-tourist protests that occurred in Bo-Kaap in 2018

Respondent C: *It's very likely that it could get to that point if the steps are not taken to divert the narrative, right now.*

Respondent D: *It will go back to the overtourism of 2018. It's already almost there. The people from the Flats have not been included and these kids are already speaking their truth behind closed doors and they may come down to pickpocket tourists and so on.*

The response of tourism officials to the potential for anti-tourist protests was that international visitors would readily find alternatives to the Bo-Kaap with reduced benefits to all.

Respondent G: *Well then, tourists will just go somewhere else, and like community members felt it during COVID they will quickly feel the impact of no income. Tourists will just go to other sites. There is so much on offer in Cape Town..*

Respondent H: *A blanket ban will have an impact on local tourism businesses who survive and thrive on tourism.*

FaceBook posts indicated the offence felt by residents of 'disrespectful' tourists who take photographs without permission. One respondent made clear the point that in Islam the photography of uncovered women is forbidden. Several respondents expressed the view that they were being Disneyfied, reduced to 'animals in a zoo' where privacy and the right to sit in peace outside your house no longer was available. Other resident concerns related to the 'inappropriate' dress of tourists and requests for more conservative dress especially around places of worship in the area. Certain respondents re-iterated the need for a code of conduct.

Respondent P: Tourists need to respect our values. We are adapting to tourist tastes without the tourists really adapting to us. Using the Auwal mosque as an example... people are not expected to cover themselves like they are elsewhere in the world (in Thailand for instance when going into a temple). I agree that the City and tour operators need to contribute to a changing narrative on the Bo-Kaap which is less shallow than colourful houses and educate tourists to be more respectful and thereby attract the type of tourist you want too.

Uneven benefits from tourism emerged as another strong theme from many resident respondents. One considered that Cape Town Tourism (the city Destination Marketing Organisation), is shirking its responsibility for the proper management of tourism. Analysis of a large volume of Facebook responses shows discontent with a tourism system which according to commentators, is 'exploitative' (Jessa, 2025). Residents largely feel that the costs of tourism outweigh the benefits. Some respondents pinpoint service issues such as cleaning and maintenance while others question where the revenue from tourism goes. The official response indicates budget shortages are responsible for a seeming lack of service delivery.

Respondent C: Cape Town Tourism does nothing to manage the number one cultural asset that they have...They're not spending their time to make sure those visitors are safe or that residents are protected. We have to do it. They're not spending a dime to clean the neighbourhood after the visitors leave. We have to do that.

Respondent E: Tourism is also about heritage and the value that we bring. I don't see the Bo-Kaap getting the value for what we are getting in terms of tourism. I don't see residents benefitting in a meaningful way, being able to send their kids for education to improve livelihoods and so on.

Respondent F: As the City of Cape Town we have such diverse needs, but also people... we have to be able to provide services to everybody....they're not getting a disservice. I don't think that's the case at all. The budget is being stretched a lot thinner.

Respondent Q: I have an issue with all those tourists that contribute nothing to the Bo-Kaap. They come and take their photos, get back in the vehicle and f... off.

Discontent was voiced also about the limited benefits from the rising number of film shoots in the area. Residents expressed frustration at being inconvenienced by film shoots, the invasion of their privacy, lack of appropriate notice and communication by the City, and the absence of local benefits.

Respondent P: *Where does the money go that gets paid to film in the Bo-Kaap...there is some sort of fee that gets paid to be able to film... it happens so often, but no-one ever sees it. Where does the money go?*

The use and sale of liquor in the Bo-Kaap was a further contentious issue. The community made repeated requests for Bo-Kaap to be a liquor-free or 'dry area'. Concern was especially about the youth having access to alcohol and drugs. The declaration of a 'dry area' was intended to make a statement of the area's moral position against substance abuse. An overwhelming number of new liquor applications which the civic has to oppose legally was noted as of concern.

Respondent E: *There have been numerous liquor applications. People don't want to have restaurants because you can't sell liquor. But my issue is that the uniqueness of Bo-Kaap, not just because it's Muslim but we recognise liquor is a problem especially for our youth so we want to keep it out of our area as long as we can.*

Overall, the results clearly demonstrate widespread community discontent at the state of current tourism operations and that for Bo-Kaap residents the costs of tourism expansion currently outweigh the benefits.

CONCLUSIONS

It has been observed that research on "the phenomenon of overtourism and its socio-economic impacts is essential for understanding the challenges faced by tourist destinations worldwide" (Graça et al., 2025, p. 152). Currently, however, the international scholarship on overtourism is conducted overwhelmingly in the context of city destinations in the Global North (Milano & Koens, 2022; Jessa & Rogerson, 2025; Tamang & Mallick, 2025). This paper responds to the call made recently in a state-of-the art review of overtourism research for a broadening focus for tourism geographical research investigations, including a wider range of geographical settings (Back et al., 2025). The novel contribution made by this study has been to document emergent issues of overtourism and the growth of resident discontent in the context of a major urban tourism destination in the Global South.

Arguably, Cape Town provides an appropriate geographical setting for this investigation in light of the city's rapid rise to become one of the leading urban tourism destinations of the Global South (Rogerson & Rogerson, 2021a, 2021c). It has been demonstrated that the inner-city neighbourhood of Bo-Kaap manifests the hallmarks of overtourism similar to those which have been well-documented in European cities (cf. Kuščer & Mihalič, 2019; Amore et al., 2020; Koens & Milano, 2024; Milano et al., 2024; Graça et al., 2025). The significance of tourism's potential to drive economic growth in Cape Town and improve local livelihoods is acknowledged. Nevertheless, there is a stark disparity between the benefits of growth and the perceived lack of direct or equitable distribution of benefits which accrue to the community of Bo-Kaap, where tourism has become the dominant economic activity. With the march of rapid urban transformation, residents are increasingly frustrated with current conditions of tourism development and experience a loss of community and sense of place.

As the Bo-Kaap neighbourhood becomes increasingly commodified elderly residents were found to be especially vulnerable and convey a sense of powerlessness and despondency with regard to these issues.

The critical policy and management challenge for the City of Cape Town authorities is to ensure that tourism benefits are distributed among residents while retaining the unique heritage and cultural identity of the Bo-Kaap neighbourhood. The results pinpoint that gentrification in the Bo-Kaap is, to a degree, driven by tourism (Jessa & Rogerson, 2025). Indeed, in common with findings recorded elsewhere, touristification is modifying the local residential and business landscape to cater for tourist consumption with the consequence that for long term residents of the neighbourhood the space becomes difficult to live in (Cocola-Gant, 2018; Alonso, 2025). The results highlight also the exclusionary and (increasingly) divisive nature of tourism impacts in Bo-Kaap. Especially, those residents from less-skilled and financially disadvantaged segments, such as in areas of informal settlement, require support for inclusion. The interviews reveal significant levels of anti-tourist sentiment in the Bo-Kaap are stemming from nuisance and perceived lack of commensurate benefits which are key concerns. The current social cost of tourism for many residents outweighs the economic benefits derived. Accordingly, in final comment, it is evident that immediate, purposeful actions and policy shifts are required to enhance the overall management of tourism and its directional pathways in Cape Town's historic Bo-Kaap neighbourhood.

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Tichaawa, Tembi M.¹ – Chamboko-Mpotaringa, Mavis²

Mapping the Evolution of Tourism Small and Medium Enterprises' Technology Adoption

ABSTRACT

This study aims to provide a comprehensive overview of the evolution of research on tourism small and medium-sized enterprises (SMEs) and to outline future research directions for advancing the field. The study systematically reviewed 102 empirical articles, utilising a hybrid review approach that integrates the Scientific Procedures and Rationales for Systematic Literature Reviews (SPAR-4-SLR) guidelines with bibliometric theoretical frameworks. It also employed the *Bibliometrix* package in R for science mapping analysis. The findings indicate a rapid growth in research on the technology adoption of tourism SMEs over time. Thematic evolution mapping identified nine distinct themes, such as digital transformation, innovation, and marketing, thereby highlighting key trends within the research field. The study revealed theoretical, contextual, and methodological gaps in existing research and made recommendations for future research directions. By combining bibliometric methods with a longitudinal thematic evolution analysis of technology adoption among tourism SMEs, this study identifies future research avenues and practical strategies to inform stakeholders and policymakers in the tourism SME sector.

Keywords: bibliometric analysis, hybrid review, research evolution, scientific procedure and rationales for systematic literature review (SPAR-4-SLR), tourism, SMEs

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INTRODUCTION

Historically, tourism businesses have been at the forefront of technology adoption, and the industry's early embrace of technological innovations has positioned it as a leader in online expenditure (Buhalis & Kaldis, 2008). Technology has revolutionised business practices, strategies, and industry structures (Buvár & Gáti, 2023), transforming traditional marketing channels, enabling new entrants through platforms such as Airbnb (Lekgau et al., 2025), and reshaping the sources of competitive advantage (Chamboko-Mpotaringa & Tichaawa, 2021). Undeniably, the advent of digital technologies in tourism has brought transformative innovations that impact tourism businesses (Mokwena & van der Poll, 2024), resulting in paradigm shifts in consumer preferences and compelling businesses to invest in digital technologies (Gil-Cordero et al., 2023) to avoid obsolescence. Tourism SMEs, akin to larger enterprises, play a vital role in economic development (Samad, 2022), contributing to revenue generation, job creation, and improving residents' quality of life, particularly in tourism-dependent economies (Maziliauske, 2024; Sánchez & Oskam, 2022). Tourism SMEs can diversify local economies beyond reliance on traditional industries, engage in value co-creation for destinations, drive innovation, and promote sustainable practices while enhancing destination resilience (Putra & Law, 2024; Torrent-Sellens et al., 2016). However, tourism SMEs often face challenges in investing in technology to fully realise their potential (Mokwena & van der Poll, 2025).

Over time, research on digital technologies in tourism has examined the advantages and disadvantages of internet distribution (Buhalis & Kaldis, 2008), technology adoption and use (Alonso-Almeida & Llach, 2013; Buvár & Gáti, 2023), attitudes and intentions regarding the use of digital technologies (Ahmad & Rasheed, 2024b; Dayour et al., 2020; Fatoki, 2020), their impacts (León-Gómez et al., 2023), and the determinants of technology adoption (Van Huy et al., 2024). These studies highlight a steady increase in the adoption of digital technologies. In light of this growing body of research, several review studies have focused on tourism technology, contributing to knowledge, theory, practice, and future research directions (Buhalis et al., 2024; Buhalis & Law, 2008; Chamboko-Mpotaringa & Tichaawa, 2024; Pesonen, 2013; Pratisto et al., 2022; Shin et al., 2023). Buhalis and Law (2008) reviewed 149 articles on e-tourism research to illustrate the roles of stakeholders in the demand, supply, and technology dimensions of ICTs in tourism, concluding that e-tourism research was still in its infancy. Pesonen (2013) analysed 188 segmentation-related studies to determine how information and communication technologies (ICTs) have influenced market segmentation literature in tourism since 2000, finding only three papers that addressed both ICT and segmentation. Following PRISMA guidelines for systematic reviews, Pratisto et al. (2022) examined immersive technologies in tourism, focusing on peer-reviewed articles published between 2012 and 2020, and identified the main applications of immersive technology. Chamboko-Mpotaringa and Tichaawa (2024) explored the metaverse as an immersive technology, analysing the impact of metaverse-enabled digital transformation on virtual experiences, consumer behaviour, engagement, business value, and competitiveness. Shin et al. (2023) conducted a bibliometric analysis of 440

technology-related articles published from 1990 to 2022 in six top-tier journals within tourism and hospitality, revealing a marked increase in the proportion of technology research over the three decades under review. They identified websites, social media, mobile devices, virtual reality, online platforms, user-generated content, self-service kiosks, and robots as key intellectual milestones. Buhalis et al. (2024) employed a critical review method to analyse technology adoption in tourism, identifying trends, opportunities, and strategies for adoption, and developed a conceptual framework highlighting the multifaceted adoption process.

Despite these prior review studies being tourism-related, they have not adequately addressed the specific literature concerning tourism SMEs, which face distinct challenges. Consequently, research tracing the evolution of technology adoption within tourism SMEs remains underexplored. While some tourism SMEs have made significant progress in adopting digital technologies, others continue to face difficulties with digital transformation. Moreover, because scholars construct relevant concepts from theoretical reasoning and given the increasing prominence of technology, several influential theoretical models have been developed—such as the Technology Acceptance Model (TAM), the Theory of Reasoned Action (TRA), and the Theory of Planned Behaviour (TPB) (Ajzen, 1985; Davis, 1989; Fishbein, 1980)—which serve as foundational frameworks for understanding technology adoption. However, these theories have limitations, including the assumption that individuals act rationally and that their behaviour follows a systematic pattern. To address these gaps and in response to the evolving context of technology adoption, additional theories have been developed over time, including the Unified Theory of Acceptance and Use of Technology (UTAUT) and the DeLone and McLean Model of Information Systems Success (DeLone & McLean, 2003; Venkatesh et al., 2003). Various technology adoption theories have been applied across different studies (Ayanwale & Ndlovu, 2024; Camilleri & Falzon, 2021; Mascherek et al., 2015), demonstrating the flexibility and versatility of these models. Therefore, mapping this evolution is crucial to understanding emerging paradigms and identifying gaps for future research.

This study aims to provide a comprehensive overview of the evolution of research on tourism SMEs' technology adoption and to propose a future research agenda to advance the field. The specific objectives are to:

1. assess how research on tourism SMEs' technology adoption has evolved over time;
2. examine the thematic evolution of literature on tourism SMEs' technology adoption; and
3. identify potential areas for future exploration.

Unlike previous review studies on technology in tourism, this study adopts a sector-specific approach with a holistic technological perspective, focusing on tourism SMEs to provide in-depth insights within the tourism sector without limiting the scope of technologies considered. The study employs a hybrid approach, utilising the Scientific Procedures and Rationales for Systematic Literature Reviews (SPAR-4-SLR) framework (Paul et al., 2021) and conducting both quantitative (bibliometric analysis) and qualitative (thematic analysis and future research directions based on the Theory–Context–Methodology (TCM) framework) analyses for comprehensive coverage. The manuscript consists of

the following sections: Introduction, Theoretical Background, Methodology, Results, Future Research Directions, Implications, and Conclusion with study limitations.

METHODS

The SPAR-4-SLR is a meticulous and robust review approach that involves assembling, organising, and assessing existing literature (Pandey & Tripathi, 2025). It has been employed by numerous researchers in multidisciplinary literature review studies (Mukherjee et al., 2023; Pandey & Tripathi, 2025; Ramya & Alur, 2023). Unlike the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA), which was originally developed for literature reviews (Moher et al., 2009) but has been criticised for providing insufficient justification for review-related decisions (Mukherjee et al., 2023), the SPAR-4-SLR approach is valued for its well-justified, data-driven decision-making process, grounded in logical and pragmatic rationales, and for ensuring a transparent review of the literature (Paul et al., 2021; Ramya & Alur, 2023).

Furthermore, SPAR-4-SLR provides a solid framework for conducting bibliometric analysis (Bekele & Raj, 2025)—a systematic, transparent, and statistically based measurement method that enables a structured synthesis of large datasets and helps to identify emerging trends and shifts within a discipline over time (Sharma et al., 2023). In the present study, 102 articles were selected from the Web of Science (WoS). Figure 1 illustrates the article selection process, and the following section explains each stage in detail.

Assembling

The assembling stage consists of two sub-stages: identification and acquisition. The identification stage clarifies the research domain, questions, source type, and quality criteria. The present study focuses on technology adoption in tourism SMEs. Guided by the theoretical foundations outlined in the introduction, the research questions (see Figure 1) were formulated to trace the evolution of technology adoption among tourism SMEs.

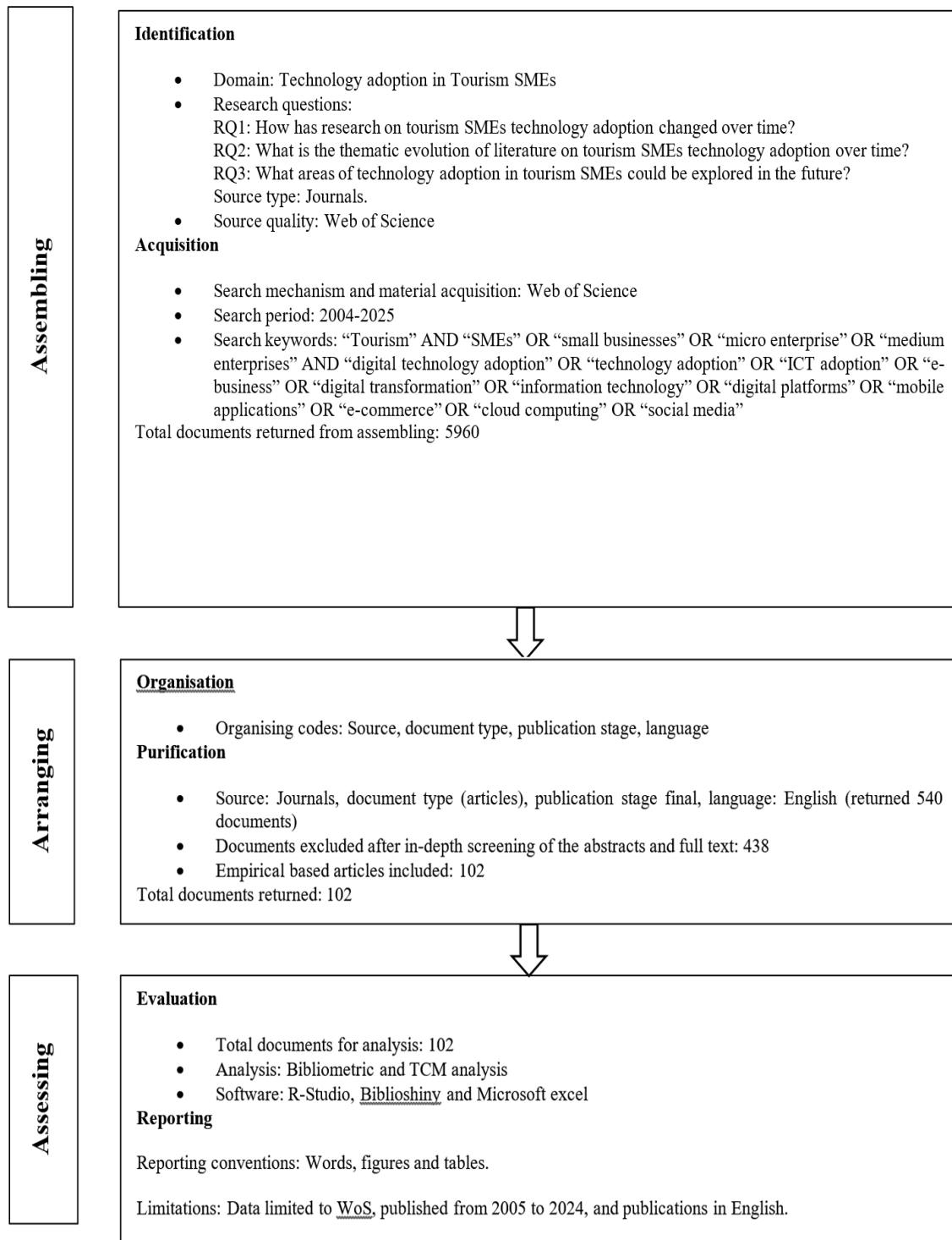
The review concentrated on academic journals that follow a rigorous peer-review process and utilised the Web of Science (WoS) database. WoS was chosen for its high-quality sources, as it is one of the largest and most authoritative databases of peer-reviewed literature, providing extensive scientific and scholarly coverage of indexed journals (Birkle et al., 2020; Chamboko-Mpotaringa & Tichaawa, 2021; Hossain et al., 2020).

Guided by the research questions and informed by previous studies (Mihalic & Buhalis, 2013; Mosweunyane et al., 2019a; Uwamariya et al., 2022; Van Huy et al., 2024), the study carefully selected keywords essential for building a comprehensive database of articles to address the research objectives. Using the WoS Advanced Query Builder, the literature search covered the period from 2005 to 2024, employing the following keywords: “Tourism” AND “SMEs” OR “small businesses” OR “micro



enterprise” OR “medium enterprises” AND “digital technology adoption” OR “technology adoption” OR “ICT adoption” OR “e-business” OR “digital transformation” OR “information technology” OR “digital platforms” OR “mobile applications” OR “e-commerce” OR “cloud computing” OR “social media.” This search yielded 5,960 documents. Synonyms were employed to ensure comprehensiveness, following strategies used in earlier studies (Buhalis & Law, 2008; Pandey & Tripathi, 2025).

Figure 1. SPAR-4-SLR guidelines



Source: Authors' elaboration on SPR-4-SLR (Paul et al., 2021)

Arranging

In this stage, inclusion and exclusion criteria were applied to identify the most relevant articles. Only peer-reviewed journal articles were included. All subject areas were considered, recognising that tourism is a multifaceted and multidisciplinary field. Books, book chapters, conference proceedings, editorials, dissertations, and handbooks were excluded due to the absence of rigorous peer review (Paul et al., 2021). Documents not published in English and those outside the 2005–2024 timeframe were also excluded. Applying these criteria reduced the sample to 540 documents. A meticulous, in-depth screening of abstracts and full texts was then conducted to remove papers that did not align with the study's objectives or that were not empirical in nature. Documents were deemed relevant if they examined technology within the context of tourism SMEs. Consequently, 438 documents were excluded, resulting in a final refined sample of 102 articles.

Assessing

Bibliometric analysis was employed to quantitatively evaluate the final sample of literature ($n = 102$). Following the established bibliometric procedure, analyses of publication trends, citation patterns, and keyword occurrences were conducted (Khanra et al., 2020). Furthermore, recommendations for future studies were guided by the Technology–Context–Methodology (TCM) framework (Mukherjee et al., 2023). The final stage of the SPAR-4-SLR approach involves reporting the findings, which are presented in detail in the subsequent sections.

RESULTS

Publication and Citation Trend

To provide an overview of the dataset, Table 1 summarises the publication output of 102 articles published between 2005 and 2024 across 80 journals, with a total of 2,238 citations and 269 authors, distributed across five regions. To analyse the evolution of research on technology adoption in tourism SMEs over a 20-year period, the sample data were divided into four sub-datasets based on a five-year (lustrum) breakdown: 2005–2009, 2010–2014, 2015–2019, and 2020–2024. Table 2 presents the results.

Table 2 illustrates an increase in active years (years with at least one publication), articles published, and citations received per lustrum over the 20-year span. Publication output was relatively low during the first three lustra [2005–2009 (4.9%), 2010–2014 (15.7%), and 2015–2019 (28.4%)] compared to the fourth lustrum [2020–2024 (51%)], indicating growing research interest in technology adoption among tourism SMEs. The rise in publications underscores a transition from limited academic attention to a pronounced scholarly focus on technology adoption within tourism SMEs, possibly spurred



by the broader digital transformation of the tourism sector driven by mobile technologies (Dayour et al., 2020; Uwamariya et al., 2022).

Table 1. Data summary (n=102)

Main information about the data

Timespan	2005:2024
Total number of articles	102
Total number of references	6691
Total number of Journals	80
Total number of citations	2238
Average citations per document	21.94
Total number of authors	269
International co-authorship	34.31%
Regions of studies	Asia (41%), Europe (24.9%), the Americas (including North and South America (15%)), Africa (12.9%), and Australia/Oceania (6.2%)

Source: Authors' elaboration

Table 2. Publication and citation evolution (n=102; in %)

	Lustrum	Active years	Articles published	Citations received
1	2005-2009	4; 22.2%	5, 4.9%	194, 8.7
2	2010-2014	4; 22.2%	16, 15.7	678, 30.3
3	2015-2019	5; 27.8%	29, 28.4	758, 33.9
4	2020-2024	5; 27.8%	52, 51%	608, 27.1

Source: Authors' compilation

The upward trajectory in publications, which intensified during the most recent lustrum, aligns with the accelerated digital transformation triggered by COVID-19, the pursuit of resilience strategies, and the increasing importance of technology for tourism SMEs (Mbatha, 2023). Unsurprisingly, although the fourth lustrum was the most productive, the third lustrum (which accounted for 33.9% of total citations) proved to be the most influential, while the fourth lustrum garnered only 27.1% of citations. This decline is likely attributable to the recency of these publications. Notably, the years 2011, 2018, and 2020 emerged as particularly influential, with 326, 309, and 340 citations, respectively, predominantly driven by the works of Aldebert et al. (2011), Kim and Shim (2018), and Nuryyev et al. (2020). Aldebert et al. (2011) accounted for 48.2% of citations in 2011, Kim and Shim (2018) for 49.2% in 2018, and Nuryyev et al. (2020) for 41.8% in 2020.

Thematic Evolution and Emerging Research Interests

Given the low output in the first decade, the sample was divided into two study periods (2005–2014 and 2015–2024) to enable a meaningful analysis of thematic evolution and to address the second

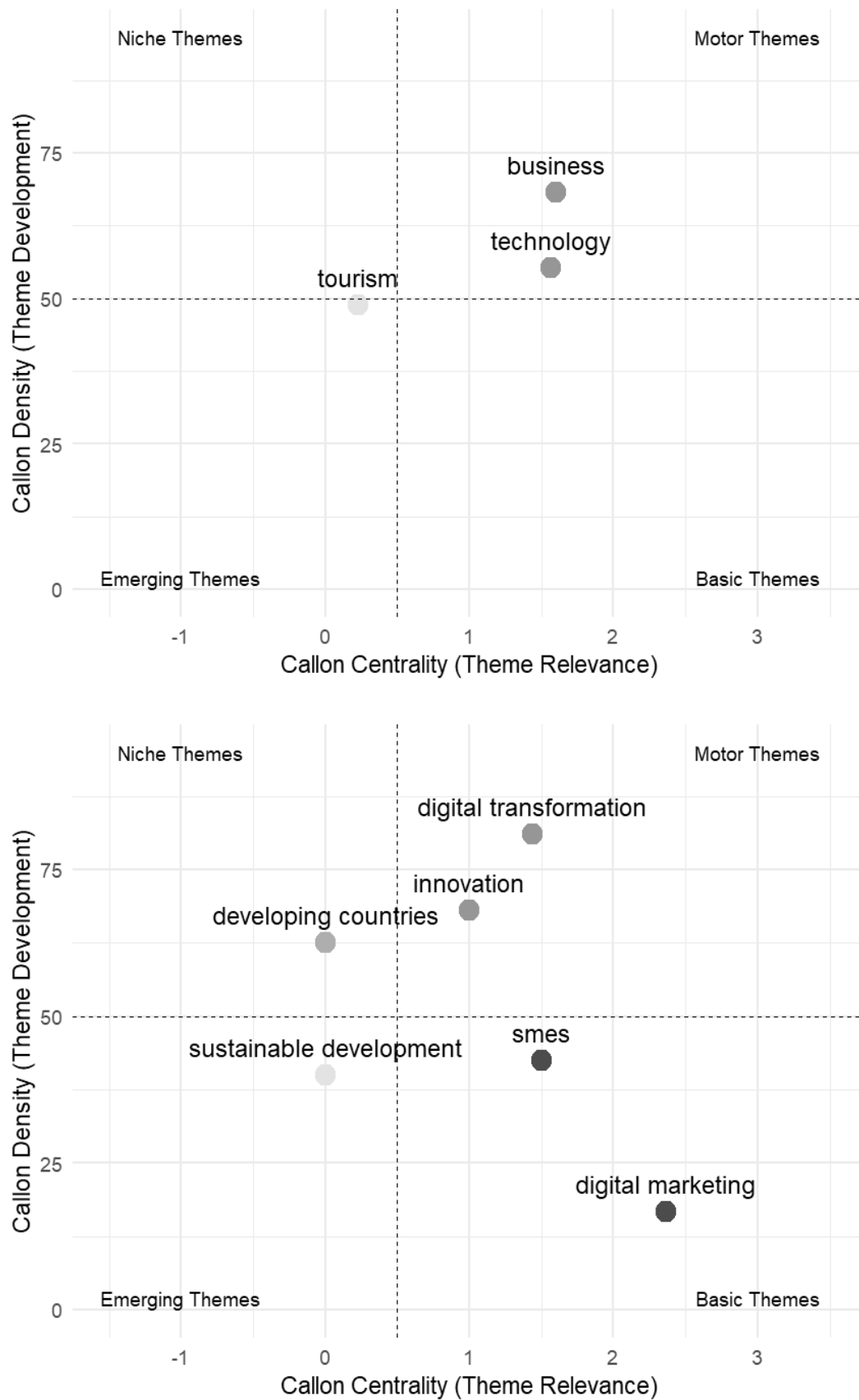
research question. The study employs authors' keywords to capture the conceptual structures of the reviewed articles, thereby clarifying the evolution of research themes over time (Donthu et al., 2021). The results are illustrated in Figure 2, which uses a strategic diagram to map the evolution of themes according to Callon centrality and Callon density across each 10-year period. Callon centrality reflects a theme's relevance within the collection, while Callon density measures the degree of its development (Aria et al., 2020). Themes are categorised into quadrants based on their Callon centrality and density: motor, basic, emerging (or declining), and niche themes (Cobo et al., 2011).

During the 2005–2014 period (Figure 2a), three primary themes emerged: business, technology, and tourism. The theme *business* is classified as a motor theme, characterised by high centrality (1.03) and high density (68.281), indicating its strong development, relevance, and importance to research on technology adoption in tourism SMEs. This theme reflects early concerns regarding competitiveness, entrepreneurship, and business performance (Glavas & Mathews, 2014; Matlay & Westhead, 2005; Milán et al., 2014). The second theme, *technology*, also emerged as a motor theme (centrality = 1.563; density = 55.208), signifying that it was both thematically developed and relevant during the 2005–2014 period. The presence of keywords such as *technology*, *ICT*, *internet*, and *e-commerce* suggests growing scholarly interest in technology, particularly concerning SMEs' increasing reliance on e-commerce, digital platforms, and ICT infrastructure (Alonso-Almeida & Llach, 2013). Authors such as Mbatha (2013) and Murphy et al. (2014) examined the impacts of the ICT revolution in Africa and explored the potential of e-commerce tools, emphasising the effects of technology adoption on the competitiveness and efficiency of tourism SMEs.

The third theme, *tourism*, characterised by low centrality (0.255) and moderate density (48.802), is classified as an emerging theme. This indicates that, although tourism served as the contextual domain for the studies, there was a lag in integrating sector-specific insights into broader research on technology adoption during the early period. The analysis revealed the emergence of research on tourism subsectors, as evidenced by the keywords *accommodation* (Smithson et al., 2011) and *hotels* (Buhalis & Kaldis, 2008). These findings point to an initial interest in how these subsectors engage with technology, laying the groundwork for future research focused on the specific challenges and opportunities they face in adopting new technologies.

During the 2015–2024 period, research on technology adoption in tourism SMEs evolved rapidly, leading to the emergence of six new thematic clusters (Figure 2b) and increasing the total number of themes to nine. The fourth theme, *digital transformation*, classified as a motor theme (centrality = 1.438; density = 81.094), encompasses research on blockchain (Nuryyev et al., 2020; Van Huy et al., 2024), digital maturity (Ka et al., 2023), and digital technologies (Mametja et al., 2023). This theme reflects the field's growing engagement with emerging technologies. Furthermore, references to the Technology–Organisation–Environment (TOE) framework and the Technology Acceptance Model (TAM) highlight studies that have advanced theoretical understanding within the domain (Ahmad & Rasheed, 2024b; Sugandini et al., 2019).

Figure 2. Thematic Evolution in the Periods 2005–2014 (a) and 2015–2024 (b)



The fifth theme, *innovation* (centrality = 1.000; density = 68.000), is also classified as a motor theme. It integrates research on innovation (Khaki & Khan, 2024; Pikkemaat & Zehrer, 2016), business models (Coles et al., 2017; Cranmer et al., 2021), technology adoption (Buvár & Gáti, 2023; Madila et al., 2022), and e-commerce (Urban & van der Putten, 2023). The findings suggest that *digital transformation* and *innovation* are key strategic drivers that reinforce the innovative capabilities of SMEs and provide a competitive edge in a digitally driven global marketplace. The two themes display significant conceptual overlap.

The sixth theme, *SMEs*, is a foundational yet transversal theme, serving as a reference point for research in the field. It focuses on key digital platforms and subsectors but lacks the conceptual development required to be classified as a motor theme. Studies within this category have concentrated on social media (Mosweunyane et al., 2019b), Facebook (Ditta-Apichai et al., 2024), websites (Canziani & Welsh, 2016), and restaurants (Romero et al., 2019). The theme's centrality (1.501) and near-average density (42.378) indicate a need for further theoretical and methodological development, particularly in light of the rapid evolution of digital platforms.

The seventh theme, *digital marketing*, exhibits high centrality (2.361), suggesting strong interconnections with other themes, especially digital platforms and SMEs, as well as significant practical relevance (Ahmad & Rasheed, 2024a; Mosweunyane et al., 2019b). Despite its low density (16.667), indicating conceptual underdevelopment, this theme presents an opportunity for future theoretical exploration (Mosweunyane et al., 2019a).

The eighth theme, *developing countries* (centrality = 0.000; density = 62.500), has emerged as a niche theme encompassing research focused on developing countries (Abou-Shouk et al., 2016), Malaysia (Sharifonnasabia et al., 2018), and South Africa (Mbatha, 2022). This theme provides context-specific insights into technology adoption among tourism SMEs. While its high density suggests conceptual maturity, the lack of centrality indicates that it remains disconnected from other themes, highlighting the need for more integrative research across disciplines, regions, and theoretical frameworks.

Finally, the ninth theme, *sustainable development*, has gained prominence in global tourism research (Borden et al., 2017; Savastano et al., 2022) and rural tourism (Oliveira et al., 2017). However, its low centrality (0.000) and density (40.000) indicate that it remains an underexplored area. This theme provides a foundational reference for future studies on tourism SMEs, particularly those integrating sustainability, digital transformation, and digital innovation.

Future Research Directions

This subsection addresses the research question, “*What areas of technology adoption in tourism SMEs could be explored in the future?*” by emphasising theoretical, contextual, and methodological research directions. The discussion follows the guiding parameters for recommendations for future studies using the TCM framework, as articulated in prior research (Kumar et al., 2022). The findings

indicate that while the literature on technology adoption in tourism has advanced, several areas still require substantial improvement.

Future Theoretical Research Directions

Most of the reviewed studies either lacked a theoretical foundation or relied on a single theoretical framework—predominantly behavioural and linear models—such as the TAM (Buvár & Gáti, 2023), BRT (Ahmad & Rasheed, 2024a), and TOE (Madila et al., 2022). The use of a single framework per study restricts the integration of diverse theoretical perspectives. Although some research has adopted alternative frameworks (Ahmad & Rasheed, 2024b; Khaki & Khan, 2024; Ledesma-Chaves et al., 2024; Sugandini et al., 2019; Van Huy et al., 2024), there remains a notable overreliance on behavioural technology adoption theories. Moreover, only a few studies have considered contextual variations among stakeholders (Lyu et al., 2024; Vinodan & Meera, 2025).

To address these gaps, future research should incorporate multiple theoretical perspectives to provide a more comprehensive understanding of technology adoption in tourism SMEs. Exclusive reliance on behavioural and linear models is limiting, as the landscape of tourism SMEs is dynamic and shaped by external pressures and multistakeholder interactions. The adoption of multidimensional theoretical approaches—beyond technology adoption or behaviour-oriented frameworks—is therefore encouraged.

Additionally, there is a need to integrate contextual approaches. Research questions such as “*How do institutional and regulatory environments affect technology adoption decisions among tourism SMEs in developing economies?*” could be examined through multi-theory designs that combine technology adoption and institutional theories. Such inquiries would extend beyond individual behavioural intentions to explore institutional pressures—such as policies and regulations—while retaining the specific context of technology adoption in tourism SMEs.

Future Context Research Directions

As digital transformation continues to accelerate, contextual factors play a crucial role in the survival and competitiveness of tourism SMEs. These factors influence how tourism SMEs adopt, use, and engage with digital technologies. The present study examined three contextual dimensions—technology, industry, and geography—which facilitated the identification of under-researched areas.

The findings reveal that existing literature predominantly focuses on technology adoption (Lama et al., 2020; Masele, 2019; Vinodan & Meera, 2025), while other studies emphasise social media (Madila et al., 2022; Mosweunyane et al., 2019a) and Facebook (Mizrachi & Sellitto, 2015), largely due to their low cost and accessibility for tourism SMEs and their customers. Research on websites (Canziani & Welsh, 2016), mobile technologies (Dayour et al., 2020; Uwamariya et al., 2022), and e-commerce (Acilar & Karamasa, 2012; Urban & van der Putten, 2023) has also gained momentum, given their role

in facilitating e-commerce integration for tourism SMEs. However, limited attention has been paid to emerging technologies such as the metaverse (Ledesma-Chaves et al., 2024), blockchain (Van Huy et al., 2024), and virtual reality (Putra & Law, 2024). These findings highlight notable research gaps concerning emerging digital technologies—particularly studies focusing on the metaverse, virtual reality, and blockchain within the tourism SME context. No studies were identified that explicitly addressed artificial intelligence (AI), big data analytics, or smart tourism systems within the domain.

Most of the reviewed articles focused on the broader tourism industry or multiple subsectors (Ledesma-Chaves et al., 2024; Madila et al., 2022; Mbatha, 2023), limiting context-specific insights. These studies often overlook the unique challenges faced by individual tourism subsectors and their distinctive adoption patterns, which can affect the relevance of policy recommendations and their alignment with the Sustainable Development Goals. There remains limited subsector-specific research on areas such as travel agencies (Sharma et al., 2020; Sharma & Sharma, 2023), restaurants (Martín-Martín et al., 2022), wineries (Paunovic et al., 2022), and accommodation (Mizrachi & Sellitto, 2015; Smithson et al., 2011). The findings therefore underscore the need for subsector-specific research on tourism SMEs.

In terms of geographical context, the findings (Table 1) indicate that most studies have been conducted in developed countries (Gritta & Calabrese, 2023; Paunovic et al., 2022; Sánchez & Oskam, 2022; Vlasich et al., 2023) or in developed towns and cities (Buhalis & Kaldis, 2008; González & Sánchez, 2023; Mbatha, 2023). In contrast, far fewer studies have examined developing countries (Ahmad & Rasheed, 2024a; Chiwaridzo & Masengu, 2024; Lima et al., 2024; Sharma & Sharma, 2023), revealing geographical imbalances in the literature on technology adoption among tourism SMEs. This disparity points to a lack of nuanced understanding of technology adoption in informal, rural, or marginalised regions.

Future research should therefore prioritise context-sensitive studies that reflect the diversity of tourism SMEs and the evolving barriers and challenges they face. Research questions such as “*How do infrastructural limitations in developing countries or rural, peri-urban, or small-town areas affect the adoption of AI-driven tools by tourism SMEs?*” or “*What are the impacts of socio-cultural values on the acceptance of immersive technologies among community-based tour operators in eco-tourism?*” could be pursued to address these contextual gaps. Such inquiries would examine the consequences of unequal access to hardware, internet connectivity, and digital skills in developing regions, while shifting the focus from general technology adoption studies to those that consider emerging technologies, subsector-specific realities, and cultural appropriateness.

Future Methodology Research Directions

An analysis of the reviewed studies indicates that most investigations were either quantitative or qualitative in nature, with few adopting mixed-methods approaches (Canziani & Welsh, 2016; Lama et al., 2020) or ethnographic methods (Roth-Cohen & Lahav, 2019), thereby highlighting notable

methodological gaps. The application of mixed, experimental, and experiential methodologies—such as observation, virtual experiences, or user-centred design—remains limited.

Future studies should employ mixed methods to integrate insights from quantitative surveys with the deeper contextual understanding provided by qualitative analyses. There is also a pressing need for more research utilising experiential methodologies and approaches that leverage technological advancements, particularly in neuroscience, such as biometric monitoring and behavioural tracking. These methods could yield richer insights into users' interactions with technology in the context of tourism SMEs' technology adoption.

Most existing studies rely on cross-sectional data collection, with a scarcity of longitudinal research (Matlay & Westhead, 2005). Various software tools have been used for data analysis, including SPSS (Masele, 2019; Mosweunyane et al., 2019a), SMART-PLS (Ahmad & Rasheed, 2024b; Ledesma-Chaves et al., 2024), and Atlas.ti (Alpheaus, 2024), though few studies employ multiple analytical techniques (Madila et al., 2022; Nazari et al., 2020). Researchers are encouraged to adopt multiple data analysis tools to enrich and triangulate findings.

Research questions such as *“How can the use of advanced neuroscience methods enhance insights into digital technology adoption in tourism SMEs?”* can help shift research beyond self-reported behaviours and perceptions—often prone to bias—towards the investigation of cognitive, sensory, and emotional responses that more accurately reflect users' interactions with digital technologies. Similarly, exploring how experiential methodologies facilitate the adoption of digital technologies in tourism SMEs would encourage the inclusion of real technology users, thereby shifting from theoretical assumptions to action-oriented insights that support evidence-based decision-making.

Implications of the Study

This study contributes to the literature by mapping the evolution of technology adoption among tourism SMEs over two decades (2005–2024), employing hybrid review strategies and providing a comprehensive overview of existing scholarship. Few prior studies have tracked technology adoption over time or considered the various stages of the technology lifecycle. This study addresses that gap through its longitudinal mapping, which reveals a growing academic interest in technology adoption by tourism SMEs.

From a theoretical perspective, the study introduces a temporal lens for technology maturity by identifying the phases, trends, and shifts that occur as technologies progress through the different lustra identified in the research. Moreover, the findings demonstrate a continued preference among researchers for behavioural intention models, similar to earlier reviews (Shin et al., 2023), which focus primarily on individual decision-making and overlook the broader social, institutional, and power dynamics that shape tourism SMEs. This underscores the need for hybrid and contextually grounded theoretical models.

In terms of practical implications, the study provides valuable insights for a range of stakeholders. The findings reveal that subsector-specific and geographically contextual data remain underrepresented, resulting in policy recommendations that are often overly generic and insufficiently tailored to the realities faced by diverse tourism SMEs. The results highlight significant opportunities for further research on specific subsectors, including events, attractions, accommodations, travel services, restaurants, and experience-based industries such as entertainment.

Policymakers in tourism and small business sectors should conduct assessments specific to both subsector and region to better inform technology adoption strategies. Policy responses should therefore move beyond generic information and adoption frameworks towards those that are both subsector- and geography-specific, addressing the unique challenges encountered by tourism SMEs.

Given the contextual challenges faced by many tourism SMEs, particularly those operating in resource-constrained environments, there are important implications for support mechanisms. Development banks, governments, and donor agencies should promote community-based digital infrastructure development through tax incentives, grants, shared digital spaces, and Wi-Fi initiatives, while targeting youth- and women-led enterprises to enhance inclusivity. Institutions should also design training programmes that reflect the operational realities of tourism SMEs, such as practical demonstrations of booking platform use, particularly in developing countries, rural areas, or historically disadvantaged regions.

From a methodological standpoint, only a limited number of studies have employed experiential and participatory methods. There is a pressing need for tourism researchers, developers, SMEs, and digital innovation hubs to collaborate in designing and testing technologies tailored to the tourism SME context. One potential approach is to pilot such technologies in innovation hubs within tourism destinations, engaging real tourists and tourism enterprises. This strategy could foster the development of user-centric technologies—such as digital signage—enhancing user satisfaction, promoting cross-stakeholder collaboration, and ensuring sustained technology adoption.

Finally, the study's findings on the evolution of research on technology adoption among tourism SMEs, its thematic progression, and identified future research directions have significant implications for forthcoming researchers. The rapidly changing landscape of technology adoption—driven by ongoing innovation and transformation—underscores the growing recognition of technology's transformative role in strengthening the competitive advantage and operational efficiency of tourism SMEs. Emerging intersections between SMEs and sustainability further suggest that future research should integrate the concepts of sustainability, digital transformation, and digital innovation. The research questions proposed in this study may thus serve as a foundation for guiding future investigations.

CONCLUSIONS

This study employed the SPAR-4-SLR guidelines and bibliometric analysis to review and analyse 102 empirical research articles across multiple parameters. Publication and citation analyses revealed a steady increase in both research output and citation counts over the study period (2005–2024). By mapping two decades of research on technology adoption among tourism SMEs, the study identified nine thematic areas, demonstrating key shifts from three dominant themes in the first decade (2005–2014) to six emerging themes in the second (2015–2024).

Building on this thematic evolution, the application of the TCM framework uncovered the most prevalent theories, primary technological, industrial, and geographical contexts, and common research methodologies, while also identifying underexplored theoretical, contextual, and methodological dimensions. This comprehensive exploration facilitated the formulation of future research directions and the proposal of illustrative research questions.

Theoretically, the study advocates for the use of multiple, multidimensional frameworks that extend beyond traditional technology adoption and behaviour-based theories to include stakeholder, institutional, and societal perspectives. Contextually, it calls for a stronger research focus on the Global South and on subsector-specific tourism SMEs. Methodologically, it recommends the adoption of mixed, experimental, and experiential approaches, the use of longitudinal designs, and the integration of multiple data analysis techniques.

The study highlights both theoretical and practical implications, offering actionable strategies and helping to bridge the persistent gap between theory and practice. The growing emphasis on digital inclusion suggests that governments, policymakers, the private sector, and other stakeholders should prioritise digital upskilling and equitable access to technology.

Although the review adhered to established reporting standards for systematic literature reviews, certain limitations remain. These include the restriction to empirical studies, the defined temporal scope, the reliance on specific databases, and the limitation to articles published in English.

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