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INFORMAL TOURISM AND SUSTAINABLE DEVELOPMENT IN AFRICA: INSIGHTS FROM A SYSTEMATIC LITERATURE REVIEW AND CONTENT ANALYSIS

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Abstract : This research explores the dynamics of informal tourism and sustainable development within the African context by combining a systematic literature review (SLR) with content analysis. The SLR was employed to identify and select relevant peer-reviewed literature. Content analysis was then applied to analyze recurring themes, concepts and insights across the selected literature from the SLR approach. The key themes that emerged were around the critical need for the integration of the informal tourism sector into the national sustainable strategies, and policy guidelines that can be able to promote sustainable practices within the informal tourism sector in respective African countries.

Key words: Informal tourism, sustainable development, Africa, Systematic Literature Review (SLR), Content Analysis, Sustainable Development Goals (SDGs)

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INTRODUCTION

In the current broader trends of the global tourism dynamics, the informal tourism sector holds a significant influence that has been growing substantially for at least the past three decades. This growth is defined by a myriad of activities that often operate outside of the formalized regulatory framework (Rogerson and Rogerson, 2021). In Africa, the informal sector is

* Corresponding Author

increasingly dominating major towns and cities across the continent-especially in the sub-Saharan (SSA) region, overshadowing the original formal business and administrative operations of these areas (Makoni et al., 2023a; Tawodzera, 2023). This sector, along with various other forms of informality, is flourishing in urban areas and central business districts (CBDs), transforming the social, economic and environmental landscapes (Moyo and Gumbo, 2021, Moagi, Ivanovic and Adinolfi, 2021; Hill et al., 2022). Despite its significance and contribution, the integration of this sector into the sustainable development strategies remains largely omitted within the African context (Bah and Goodwin, 2003; Makoni et al., 2023b). This raise concerns over the unaccounted-for impacts of this sector on the social, economic and environmental attributes of the region (Rogerson, 2014; United Nations Conference on Trade and Development [UNCTAD], 2019a).

As the sector continues to grow, it poses both opportunities and challenges for sustainability in destinations. For instance, the sector is responsible for livelihood enhancement- especially for women, youth and marginalized communities, while it simultaneously presents concerning issues such as environmental degradation and social imbalances (Musavengane et al., 2020; Makoni et al., 2023b). A thorough investigation that seeks to establish how the informal tourism sector can be better assimilated into the sustainable development discourse in Africa is required, especially considering the significance to the SDGs (Rogerson and Rogerson, 2021). The purpose of this research, therefore, was to evaluate the existing knowledge on the dynamics of informal tourism and sustainability in Africa. This evaluation was essential in order to identify gaps in knowledge and develop practical solutions for effectively incorporating informal tourism into the broader development and policy discourses on sustainable development in Africa.

To achieve this purpose, a systematic literature review (SLR) was used to analyze exiting knowledge on the subject under investigation, focusing on the key themes that emerged on “informal tourism” and “sustainable development” in “Africa” from existing literature on African scholarship. An SLR was used to offer insights into what is currently known and in existence within the body of knowledge on the dynamics of these two concepts. This information was then evaluated with a view to providing recommendations on relevant policy frameworks and strategies to augment the integration of informal tourism into mainstream developmental policies. By conducting this research, the researchers sought to provide insights that could foster a substantial engagement with the informal tourism sector. This sector is known to make a substantial contribution to Africa’s social, economic and environmental sustainability (Wang et al., 2023). This research, therefore, sought to promote accountability in this contribution through the discussions and recommendations it carries.

LITERATURE REVIEW

Informal tourism can be defined as tourism activities that operate outside formal structures and regulations, encircling many services provided by local communities (Elgin et al., 2021; Rogerson and Rogerson, 2021). In Africa, the informal tourism sector is vast, incorporating many activities from individual local stalls to organized craft markets (Rogerson and Rogerson, 2021; Makoni, 2024). These activities are playing a vital contribution to various African communities' wellbeing and cultural conservation (Dada et al., 2022). Some of the businesses and activities that are inclusive of informal tourism are presented in Table 1.

Table 1. Activities associated with informal tourism
Source: Makoni (2024)

Informal tourism activity/business	**Notes**
Street Vendors	Street vendors play a vital role in urban tourism by providing affordable local food and handmade crafts, contributing to the cultural experience of tourists. They enhance the vibrant atmosphere of streets and markets
Guided Tours	Informal local guides offer personalized tours, sharing unique insights and stories about their communities, which enhances the visitor experience beyond conventional tourist paths
Homestays	Homestays allow travelers to immerse themselves in local culture by staying with families, providing an authentic experience of everyday life in the area (Guttentag, 2015)
Cultural Workshops	Cultural Workshops led by local artisans teach tourists traditional skills, such as cooking or crafting, fostering cultural exchange and deeper appreciation of local heritage
Pop-Up Markets	Temporary markets offer a platform for local producers to sell their goods directly to tourists, showcasing regional specialties and supporting local economies
Transportation Services	Informal transportation options, such as shared rides or local taxis, provide convenient and often more affordable ways for tourists to navigate urban areas, enhancing mobility
Cultural Festivals	Community festivals celebrate local traditions, arts, and cuisine, attracting tourists and providing an opportunity for cultural immersion and engagement with local residents. (Getz, 2008)
Local Performances	Street performances and local art shows allow tourists to experience the vibrant creative expressions of the community, enriching their understanding of local culture
Adventure Activities	Informal guides lead adventure activities such as hiking, biking, or wildlife tours, offering tourists unique outdoor experiences that highlight the region's natural beauty
Art and Craft Sales	Local artisans selling their artwork and crafts directly to tourists not only promotes cultural heritage but also supports the local economy and provides visitors with unique souvenirs. (McIntosh & Siggs, 2005)
Beach or Park Rentals	Locals renting out beach or park equipment, like umbrellas or sports gear, provide tourists with essential amenities to enhance their recreational experiences in natural settings
Photography Services	Local photographers offer personalized photo sessions, helping tourists capture memorable moments while providing insights into beautiful local backdrops and cultural sites

As demonstrated in Table 1, the informal tourism sector is comprised of various activities that enhance tourists' experiences and contribute to community livelihoods. For example, the existence of street vendors provides novel experiences for tourists, such as culture, food and crafts (Nyathi et al., 2025). The sector is not a new concept, it has been, for a long time now, a significant aspect of the tourism landscape in many destinations in both Global North and Global South contexts (Sepadi, 2025). In the Global North for example, the tradition of informal tourism can be traced through the engagements in "staycations" by locals who would travel to explore attractions and activities around their own destinations. This practice has been predominant for decades, especially in the United Kingdom region where travel evolved as a post-world war necessity into a prevalent practice in modern tourism of the region (Miller, 2020). Kenya represents a typical characteristic of informal tourism in the Global South, where the concept is embedded within the initiatives of community-based tourism (CBT) (Mazzuoli, 2025).

For instance, in the Masai communities, the locals are active in providing tourism services to tourists, such as local guided tours and cultural experiences (Holland et al., 2022). This practice is responsible for facilitating economic transformation in Kenya, and it is traced back to the 20th century as it evolved from traditional community practice to a prevalent form of tourism offerings (Ogada et al., 2022). Informal tourism in Africa continues to evolve because of the ever-increasing demand for authentic experiences by tourists, leading them to opt for a direct engagement with the locals who are available to offer them things to do and see in their environments (Saarinen, 2007; Katongole, 2025). This sector [informal tourism] is a significant aspect of livelihood enhancement and plays a vital role in the local economic fabric and fostering cultural exchange (Madichie et al., 2021; Tichaawa, 2021; Tawodzera, 2023).

There are various factors that influence the nature of informal tourism, such as socio-economic situations, cultural aspects, and tourism trends globally (Cukier and Wall, 1994; Damayanti et al., 2018; Lv, 2020). In Africa, resilience in the face of such issues as poverty, lack of employment, inadequate household supply, competition and globalization are some of the key drivers of rising informal tourism (Bensassi et al., 2019; Africa Export-Import Bank, 2020; Makoni et al., 2023a). This sector's characteristic of operating outside the jurisdiction of the formalized frameworks can result in several challenges regarding its assimilation into formal tourism strategies and broader sustainable development agendas (Achaempong and Tichaawa, 2015; Rogerson and Rogerson, 2021; Makoni and Rogerson, 2023; Thorn et al., 2025). The key issue regarding this sector is its informal nature, which means its regulation and accountability, as well as its impact on sustainability, is not fully comprehended (Lv, 2020). This renders the need to understand this sector more with a view to gaining insights into its significance to the sustainable development of Africa.

The dynamics of the informal tourism sector and sustainable development is characterized by both opportunities and challenges (Achaempong and Tichaawa, 2015). This sector plays a substantial role in affecting the SDGs, especially those associated with poverty alleviation, the economy and gender relations (Sultana et al., 2022; Wang et al., 2023). For example, this sector provides direct employment which results in income generation (Snyman, 2017; International Labor Organization [ILO], 2018; 2020). Also, this sector promotes the growth of local economies including those in marginalized areas (Mugambi, 2018; Makoni and Tichaawa, 2021; Nyathi et al., 2025). Conversely, the sector also results in dire environmental impacts such as the depletion of resources and ungoverned waste disposal (Potts, 2008). These impacts are crucial to address for the promotion of sustainability (Dayamanti et al., 2018). Some of the key SDGs affected by this sector include SDG 8 (Decent Work and Economic Growth) (Amuda, 2024), SDG 11 (Sustainable Cities and Communities) (Masango et al., 2020), and SDG 12 (Responsible Consumption and Production) (Davidescu et al., 2024).

The sector's job creation opportunity, supplementing of household income, and local economy enhancement characteristics strongly align with the sustainable development goals (SDGs), though there is limited regulation of the sector, which leads to perilous operational conditions and inadequate environmental regulations (Dada et al., 2022; Wang et al., 2023; Nyathi et al., 2025). What makes the subject of informal tourism relevant in current issues of Africa's sustainable development is that in many countries in the continent, the sector serves as a lifeline for the bigger portion of the population (Rogerson, 2014; 2017; De Jager and Musuva, 2016; UNCTAD, 2019a, 2019b; 2019c; Makoni et al., 2023a; 2023b). It is largely a means for survival for many individuals while it offers a big portion of employment and household income (Brenton et al., 2014; Musavengane et al., 2020; Rogerson and Rogerson, 2025).

Nonetheless, a limited, or lack of, integration of this sector into the formal structures of regulations, policy and strategy for sustainable development can worsen the negative impacts associated with this sector, which triggers the need for a balanced approach to this sector's development (Makoni et al., 2023a; Wilson-Youlden and Farrell, 2025). The informal tourism sector can foster conservation initiatives for communities, which helps in the contribution to sustainable practices (Dada et al., 2022). Therefore, by engaging locals into the formal structures of the tourism sector, they can be able to utilize their resources to encourage sustainable development. This participatory approach can enhance the resilience of both local communities and ecosystems, ensuring that informal tourism contributes positively to the broader sustainability agenda (Sepadi, 2025. Incorporating informal tourism into the developmental initiatives of destinations is crucial as it promotes its potential while simultaneously minimizing the associated negative impacts (Makoni et al., 2024; Nyathi et al., 2025). Through the formalization of this sector, stakeholders can augment the environmental preservation and promote an equitable distribution of tourism benefits, thereby contributing to the overall sustainability on Africa. Current scholarship on sustainable development of Africa, however, underplays the substantial dynamics of the informal tourism sector (Makoni, 2024). Such a gap that requires a more systematic approach to address if sustainability through informality in Africa is to be achieved.

RESEARCH METHODOLOGY

The research methodology employed for this study is presented in Figure 1.

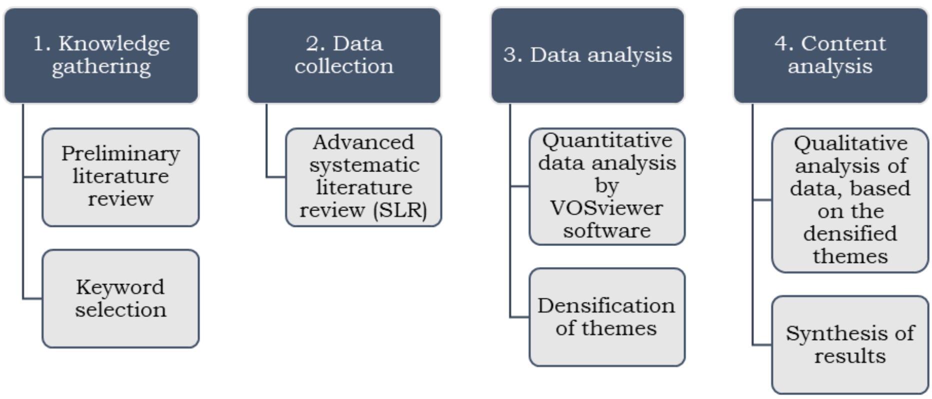

Figure 1. Block diagram illustrating the summative steps of the research methodology
Source: Authors

Knowledge gathering through a preliminary review of global literature

The research study commenced by the gathering of knowledge on informal tourism and sustainable development, which in turn was essential for grounding the research methodology. This knowledge gathering was done via a broad-based preliminary review of global literature, using a generic keyword search string: TITLE-ABS-KEY ("informal tourism" AND "sustainable development" OR “sustainability”), to query citation index databases such as ScienceDirect and Scopus for peer-reviewed publications. This was done to understand and augment the research gap. These citation index databases are advantageous for hosting comprehensive research output on tourism and sustainable development. Scopus and ScienceDirect were selected as the sole databases for this SLR because of their extensive coverage of high-quality, peer-reviewed literature relevant to tourism and sustainability. Scopus offers a broad, multidisciplinary scope with strong search and citation tools, while ScienceDirect provides full-text access to leading journals in environmental and tourism research. Together, they ensure both depth and breadth of scholarly sources, making them well-suited for a focused and rigorous review. Upon reviewing the publications obtained from knowledge gathering, there was a need to select keywords which were essential for data collection, via an in-depth systematic literature review in the next step. Accordingly, through reviewing the publications, keywords with the highest keyword frequency of occurrence, were identified and collated.

Systematic literature review (SLR)

A systematic literature review (SLR) uses explicit systematic methods to critically appraise research, by locating peer-reviewed research publications; qualitatively analysing the publications’ contributions; and synthesising findings (Jafri et al., 2024). In an SLR, common keywords are essential as part of data collection, to obtain a relevant sample size of publications, via the querying of research citation index databases (Tamala et al., 2022). Accordingly, the keywords which were filtered and collated in the knowledge gathering step were used to generate a keyword search string, which in turn was utilised to query the citation index databases for research publications, in the execution of the systematic literature review. The search criteria were limited to 2014 – 2025, English publications; and Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) protocol is Click or tap here to enter text used to screen articles for relevance (Jäger-Roschko and Petersen, 2022). The publications were then downloaded in RIS format, which is compatible with VOSviewer software, for data analysis in the form of bibliometric analysis, in the next step.

Bibliometric analysis

Upon downloading the research publications from citation index databases [Scopus and ScienceDirect] in RIS format, the publications were then imported into VOSviewer software for bibliometric analysis, to gain insight on the important themes surrounding the research area. Bibliometric analysis is herein defined as a quantitative research analysis technique which leverages statistics to map the structure, characteristics, and patterns of research areas from published research data, in the form of citation analysis (Zhang et al., 2024). The election of bibliometric analysis for this study was premised on the present deficit of studies that extensively map the relationship(s) between informal tourism and sustainable development accordingly (Makoni et al., 2024). VOSviewer software was chosen for bibliometric analysis, since it enables the analysis and visualisation of relationships between research data, premised on citation relationships, particularly mutual interdependencies of citations between keywords, and co-citation clustering of keywords (Li et al., 2024). From these graphical visualisations, insight on the important themes is obtained based on the densification of keywords into nodes, based on their visibility, or relative importance (Telukdarie et al., 2024). This then informs the key themes to review during the critical content analysis step, and thus synthesise the research contributions.

Critical content analysis

Upon execution of the bibliometric analysis to obtain the important themes surrounding the research area, critical content analysis was executed through reviewing the publications, and qualitatively making deductions as informed by the important themes extracted via bibliometric analysis, accordingly.

RESULTS

SLR Results

Informed by the preliminary literature review, the most frequently occurring keywords were collated, and tabulated in Table 2. These keywords were then utilised to conduct an in-depth SLR.

Table 2. Collated keywords premised on the preliminary literature review
Source: Authors

Item	Keyword
1	Tourism
2	Informal tourism (enterprise)
3	Sustainability
4	Africa
5	Developing countries
6	Integrated strategic planning
7	ESG
8	Policy
9	Sustainable tourism
10	Sustainable Development Goals

Based on the 10 keywords presented in Table 1, the following keyword search string was generated for advanced SLR: TITLE-ABS-KEY ("informal tourism" AND "sustainable development" OR “sustainability” OR “developing countr*” OR “ESG” OR “policy” OR “integrated planning”). The keyword “africa” was embedded in “developing countries” and “sustainability” and “sustainable development goals” embedded under sustainable development. Upon querying the research databases, 18000 papers were downloaded in total from Scopus, and 6000 papers in total were downloaded from ScienceDirect, based on the search criteria, to make them 24000 in total. Upon importing a total of 24000 papers into Zotero for deduplication 15500 papers remained. The authors then screened the publications based on title and abstract relevance, thus leaving a total 12000 publications for quantitative analysis in the form of bibliometric analysis via VOSviewer software. Bibliometric analysis via VOSviewer software resulted in a network of densely connected keywords which are clustered around

4 color-coded cluster as illustrated in Figure 2 below, with the first 89 keywords deemed as necessary for visualisation, within this densely connected network.

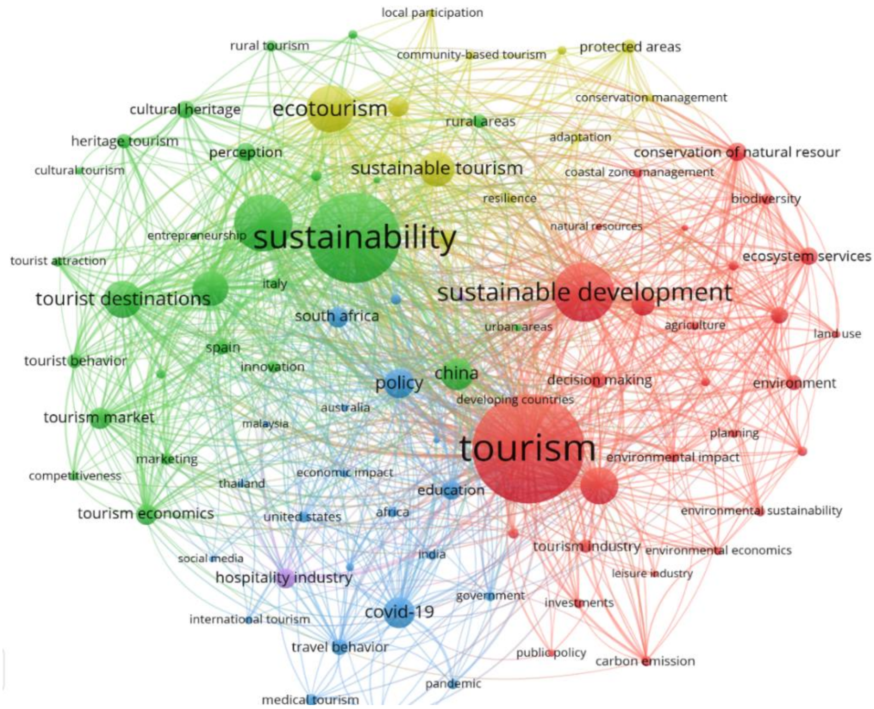

Figure 1. Graphical presentation of the top 89 keywords
Source. Bibliometric analysis, via VOSviewer software

Keyword Co-Occurrence Analysis and Thematic Clustering

To identify dominant research themes and interconnections in the literature on informal tourism and sustainable development in Africa, a co-occurrence analysis of keywords was conducted using VOSviewer (See Figure 2). Out of the 89 keywords that were deemed necessary for visualization, a total of 20 high-frequency keywords were analyzed and grouped into four thematic clusters, each representing a different dimension of the research landscape. The list of the first 20 keywords and their order of relevance and importance based on the quantitative parameter total nodal link strength is presented in Table 3, while the four thematic clusters are shown in Table 4.

Table 3. Keywords and total nodal link strength

1	**tourism**	**1**	**16270**
2	sustainability	2	14414
3	tourism development	2	10464
4	sustainable development	1	10323
5	ecotourism	4	8936
6	tourist destinations	2	6743

7	economic development	1	6314
8	tourism management	2	5946
9	china	2	4848
10	policy	3	4625
11	sustainable tourism	4	4212
12	tourism market	2	3517
13	environmental protection	1	3414
14	covid-19	3	3375
15	tourism economics	2	3204
16	stakeholders	4	3088
17	conservation of natural resources	1	3083
18	climate change	1	3005
19	perception	2	2750
20	education	3	2724

Table 4. Dense network of keywords in different clusters based on the Vosviewer result

Cluster	**Color**	**Keywords**
1	Red	Tourism, sustainable development, and environmental implications
2	Green	Sustainability, entrepreneurship, tourist destinations, tourism markets, tourism economics
3	Yellow	Sustainable tourism and ecotourism
4	Blue	Policy

This parameter enables the visualisation of the keywords, which are ordered in hierarchal order based on their relative importance. The denser the visualisation of the keyword (Figure 2), the stronger the total nodal link strength of that keyword. It can therefore be deduced that "tourism" is the strongest theme on the research area (Figure 2), with a total nodal link strength of 16270 followed by sustainability, and the rest of the keywords in that particular order as presented in Table 3.

Cluster 1(Red) – Tourism, Sustainable Development, and Environmental Implications

This was the dominant cluster as shown on the Vosviewer result (Figure 2) and included keywords such as tourism, sustainable development, economic development, environmental protection and climate change. These keywords underscore literature's strong concentration on the interplay of tourism activities and sustainable development, especially regarding environmental sustainability and conservation of resources. For instance, 'tourism' and 'sustainable development' showed the highest total nodal link strengths- 16 270 and 10 323 respectively which highlights their central position in this discourse. However, literature under this cluster is largely focused on formal tourism systems and governed eco-development frameworks, while there is limited explicit reference to the informal sector. In the context of Africa, such an omission is critical given that the informal tourism activities often take place within ecological sensitive areas. While the informal tourism players are economically significant and deeply rooted in local livelihoods, their integration into formal ecological conservation frameworks is largely limited. This highlights gaps in policy inclusion, impact assessment and regulatory engagement of the informal sector. Therefore, there is a critical need to investigate how informal actors interact with, or bypass, sustainability efforts, and how they might be better included in conservation-oriented tourism strategies.

Cluster 2 (Green) – Sustainability, Entrepreneurship, and Market Dynamics (Green)

This cluster highlights the focus of literature on economic and managerial factors of tourism. These include market behavior, destination competitiveness and entrepreneurship. This cluster indicates that literature on informal economic activity is primarily framed through the lens of entrepreneurship. This reflects the business-oriented and survivalist nature of the informal tourism sector, as seen in studies that describe informal actors as migrant entrepreneurs, survivalists, or informal traders. The inclusion of 'China' in this cluster (total nodal link- 4848) highlights the cross-regional contexts, comparisons and influences, which shows the global knowledge flows onto the African tourism context. Literature under this cluster also highlights that informal tourism entrepreneurship is the backbone of Africa's tourism economy, both in urban and rural settings. The informal actors in this case are reported to demonstrate resilience and adaptability, local knowledge though they are largely sidelined from the formal tourism economics and market analysis conversations. This presents a significant conceptual and empirical gap regarding the dynamics of informal tourism and sustainability in Africa.

Cluster 3 (Yellow) – Sustainable Tourism and Ecotourism

Literature under this cluster emphasizes alternative, community-based tourism frameworks that are associated with ecological conservation and social sustainability. Similar to the other clusters, there is limited literature addressing the role of informal tourism and its actors within sustainable tourism contexts — despite the fact that the principles of sustainable tourism and ecotourism are well-suited for the inclusion of local communities and small-scale or informal operators. The inclusion of 'stakeholders' under this cluster highlights the growing scholarly interest in participatory initiatives and inclusive government in tourism development. Practically, the informal tourism actors largely serve as de facto stewards of ecotourism resources. Their exclusions from the formal regulatory and planning procedures impacts negatively on both their prospective contribution and access to the benefits of sustainable tourism initiatives. The literature, despite recognizing the significance of stakeholders, centers largely on formal tourism frameworks. Such an omission highlights a gap in inclusive governance, which suggests that informal tourism actors are under-researched and underrepresented in sustainable tourism and ecotourism discourse.

Cluster 4 (Blue) – Policy and External Factors

This cluster presents literature on external factors, policy and governance, critical areas for informal tourism. Policy for example, while it is crucial for the inclusion of informal tourism, is to a great extent focused on a top-down approach to planning and regulation, with limited focus on how policies are adapted, or fail to adapt, to informal tourism realities. In addition, the inclusion of 'Covid-19' under this sector shows growing scholarly discourses on the vulnerability of informal tourism actors who are overlooked on social protection or access to recovery programs as opposed to formal actors. The Covid-19 (total nodal link- 3 375) underscores how the recent pandemic has caused significance disruptions and triggered a rethinking of adaptability and resilience as well as health and safety within the informal tourism sector (Makoni and Tichaawa, 2021). Meanwhile, policy links the literature to institutional responses and regulatory frameworks needed to integrate informality into sustainable tourism strategies. In addition, the pandemic prompted the urgent need for recognizing the informal sector and adopt target strategies to formalize this sector. However, literature shows that a policy divide still exists between formal and informal tourism. The notion is that while informal tourism is widely part of the African economic fabric, it remains marginalized in policy, planning and development discourse.

Overall, the keyword co-occurrence analysis reveals that while the broader literature on tourism and sustainability is rich and evolving, the informal tourism sector remains largely overlooked within those conversations, particularly in Africa where it plays a vital role in shaping economic, sociocultural and environmental dimensions. Each cluster provides insights on the current gaps in the current literature on the subject matter. Some of the key literature gaps that emanated from this SLR include the following,

- The environmental impact and potential of informal tourism actors is largely ignored in sustainability planning
- Informal tourism entrepreneurship is rarely acknowledged on economic and market analyses
- Current sustainable tourism frameworks do not incorporate informal tourism and its stakeholders
- Policy literature does not reflect the realities of informal tourism operations
- Sustainability of tourism in Africa is centered largely on the formal structures and priorities a top-down approach while limited attention is given to the informal tourism sector.

These thematic insights form the analytical foundation for the content analysis presented in the subsequent section. Through mapping the most frequently occurring themes and the interrelationships, the SLR offered a structured overview of the dominant themes within the literature on the subject matter. The content analysis builds on these themes to examine how they are discussed, contextualized, and applied within the body of literature on informal tourism and sustainable development in Africa.

Content analysis

The findings of the SLR highlight a significant gap in research that particularly unpacks the dynamics of informal tourism and sustainable development of Africa. It was noted in the review that much literature, so far, has been done on the broader concept of the "informal economy" in Africa from at least the early 2000s. Regarding the subject under matter, much of the current scholarship reflects on the areas of ICBT (Nshimbi et al., 2018; Musoni, 2020), migrant entrepreneurs (Rogerson, 2014; 2018), borderlands studies

(Moyo, 2020), and only a small fraction on domestic informal business tourism, an emerging trend that remains largely unaccounted for in current discourse (Makoni et al., 2023a). Despite this, several themes emerge through the SLR, which reveals the role of the informal tourism sector in supporting the local economies and wellbeing. Simultaneously, the review shows that there is a significant gap in literature that, particularly, engages in the dynamics of informal tourism and sustainable development (Mugambi, 2018; Fourie et al., 2024; Makoni, 2024). This underscores the need for targeted research on the interplay of these two phenomena within the parameters of an African development narrative.

One of the most notable findings is the recognition that the informal tourism sector often manifests outside the formal regulatory frameworks, which results in both opportunities and challenges for sustainable development (Nani et al., 2025; Nyathi et al., 2025; Rogerson and Rogerson, 2025). For instance, while the sector [informal tourism] is praised for contributing to some of the key sustainability factors in communities, such as local economic development (LED), employment creation, poverty alleviation and cultural preservation (Dada et al., 2022; Fourie et al., 2024), much of the existing literature does not fully explore how informal tourism can be effectively integrated into broader sustainable development frameworks (Makoni et al., 2024). This omission is, particularly, evident in African literature, where informal tourism is often seen as a marginal and unregulated sector, despite its potential to support sustainable practices (Rogerson, 2014).

The review shows that the sustainability of tourism in Africa is faced with many challenges because of the informal characteristics of much of this industry (UNCTAD, 2019a; Mumbire, 2025). Literature available on this topic indicates that informal tourism has limited essential regulations to minimize associated environmental impacts such as the over usage of resources and environmental degradation (Golub and Kobou, 2020). If well managed, however, informal tourism can provide positive outcomes. Current literature highlights that informal tourism is both complementing the formal tourism industry and contributing to sustainability, yet the overarching gap remains in the integration of this sector into the policies and frameworks that promote sustainability (Makoni et al., 2023a; 2023b; Makoni et al., 2024; Makoni and Rogerson, 2024; Nyathi et al., 2025; Rogerson and Rogerson, 2025). This situation is common in Africa, where informal tourism is playing a crucial role in enhancing tourists' experiences and communities' wellbeing (Njaya, 2015; UNCTAD 2019a; b; c; World Bank, 2020). For instance, regions such as the Maasai Mara in Kenya (Tubey et al., 2019), and South African townships [such as Soweto and Khayelitsha] (Booyens, 2021), informal tourism is a key driver for the formal tourism functionality through boosting cultural experiences and local economies. However, these informal sectors often lack integration into national policies, limiting their full potential to contribute to sustainable tourism frameworks (Ngoasong and Kimbu, 2016). In addition to this, this study shows that there is a lack of research focused on developing guidelines on how informal tourism can be integrated into the formal plans to align with the SDGs, such as the SDG 12- Responsible consumption and production in the African continent. This omission leaves a significant and topical area for further investigation.

In the case of tourism development, existing literature largely focuses on the impact of formal tourism as a driving force of Africa’s economic growth and sustainability, with limited focus on the potential of informal tourism. In the Southern African region, literature on informal tourism has predominantly focused on Zimbabwe and South Africa, during this past ten-year period under analysis (Makoni et al., 2023a; Makoni and Rogerson, 2024, Nyathi et al., 2025). These case studies highlight the crucial role of informal tourism businesses and operators in enhancing livelihoods and contributing to local economies. This body of work is largely divided into two key areas of analysis, following Timothy and Teye’s (2005) categorization of business tourism in Africa. One area examines informal domestic business tourism, while the other focuses on informal international tourism, which is often referred to as Informal Cross Border Trade (ICBT).

Current literature is largely dominated by studies on ICBT (Adeyinka, 2014; Brenton et al., 2018; Kahiya and Kadirov, 2020), with only a few recent works beginning to explore the domestic aspect (Makoni, 2024). Although these studies have gained prominence in African scholarship, they primarily concentrate on the operational characteristics of the sector. Specifically, they profile the drivers, challenges, and opportunities within informal tourism, as well as its role in supporting marginalized populations, such as women, youth, and the unemployed. However, there is a noticeable gap in research that delves into the strategic aspects of this sector, particularly its relationship with broader tourism, development and sustainability across the continent. This gap highlights the need to support the informal tourism sector through infrastructure, training and policy development.

In addition, it is observed in this review that there is limited literature on the interplay between informal tourism and ecotourism/conservation. Despite the existence of examples of the sector’s contribution to the conservation of natural resources, especially in key conservation areas, urban spaces and ecotourism hotspots, the informal tourism operators and businesses normally lack the skills and training on environmental management due to the absence of training and capacitation. Current research, therefore, highlights the need for integrating informal tourism operators into the ecotourism frameworks through training programs and capacity building initiatives (Giampiccoli and Glassom, 2021). This will help in ensuring that the contribution of the sector to ecotourism remains consistent. The absence of such initiatives, together with effective tourism management, are key issues emanating in various studies. Many of the informal tourism operators do so without proper guidance and regulations, which leads to consequences such as environmental damage, congestion as well as unequal competition with formal business. That given, environmental conservation remains one of the biggest issues of concern.

A significant gap identified in this review is the lack of policies specifically designed to integrate informal tourism into formal sustainable development frameworks. Existing literature on policy and informality in Africa highlights that informal operators are often excluded from policy-making processes (Kromidha et al., 2023). Moreover, these operators are frequently treated as obstacles to formal development structures, particularly in urban areas, where they face persecution and harassment by enforcement authorities (Kitole and Sesabo, 2024). This exclusion undermines efforts to create comprehensive, interdisciplinary sustainable tourism planning and practices.

To address this, there is a clear need for policies that promote the inclusion of all stakeholders, both formal and informal, and establish guidelines that recognize the role of informal tourism. Additionally, regulatory frameworks should be developed to ensure a balance between the sociocultural, environmental, and economic dimensions of tourism. The literature suggests that informal tourism remains largely marginalized in policy discussions, creating a gap in understanding how stakeholders can collaborate to foster more sustainable tourism ecosystems.

While informal tourism has a substantial capacity to contribute to Africa's sustainable development, there are significant gaps in literature that need to be addressed. Most importantly, the dynamics of informal tourism in Africa are underexplored, particularly in relation to its integration with frameworks for formal sustainable development. There is a need for more research into how informal tourism can be regulated, supported, and developed to maximize its economic, social, and environmental benefits in the region.

CONCLUSION

The interplay of the informal tourism sector and sustainability, particularly in the African context is an area that is rarely spoken of in literature. As this paper aimed at closing this gap and illuminate on some of the key issues emanating from the existing knowledge on this context, it provides insights into both the opportunities and challenges for sustainability that are presented by the sector. The findings reveal that while the informal tourism sector presents a lot of potential to the sustainable development of Africa and currently playing a vital role in determining the current sociocultural, economic and environmental conditions in the continent, it remains an undervalued, unaccounted for and unregulated sector, with many gaps that require urgent attention.

This research underscores the need for more focused research and policy on the dynamics of informal tourism and sustainable development of Africa. Particularly, the integration of the informal tourism sector into the broader sustainable development agendas and frameworks in the continent is of importance if the positive contribution of the sector is to be maximized. A multi-stakeholder approach is required, in which all affected parties, such as researchers and policymakers, need to collaborate in designing relevant policies and structures that can facilitate the development and growth of the informal sector and promoting its alignment with sustainable development principles in the continent.

Ultimately, the informal tourism sector has the potential to be a key sustainable development driver in Africa if it is rendered with the relevant support and resources needed for it to prosper. In addition, continued research on the topic is crucial to ensure all aspects of accountability necessary for data-driven decision making in strategic growth and sustainability are thoroughly explored. With the continued growth of the tourism industry in Africa, and the substantial credence it is given in African development scholarship, the imperative now significantly lies in engaging with the untapped potential of the continent's informal tourism sector. This will assist in promoting the sector's significant role in driving the sustainable development of Africa.

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QUALITY OF LIFE IN THE CITY OF TÂRGOVIŞTE (DÂMBOVIŢA COUNTY, ROMANIA)

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Abstract : Quality of life studies are numerous and of great interest. Beyond their practical utility, are also heavily publicized. The methodologies used are highly heterogeneous, relying on various statistical data and indicators, comparisons and correlations its difficult to make. This study aims a combined analysis of data and statistical indicators with questionnaires applied in the field in order to introduce an qualitative aspect - self-perception. The obtained results have been interpreted, compared, validated through correlation coefficient calculation and predictively analysed through linear regression. The analysis allowed identification trends and the formulation of some conclusions regarding important aspects of quality of life.

Key words: Quality of life, geography, sustainable development, correlation, linear regression, Târgovişte, Romania.

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INTRODUCTION

The concept of *quality of life* has gained significant attention in the past two decades, being present in scientific studies (since 1970 in the field of social sciences) as well as in the mass media and everyday vocabulary; hence the theoretical and practical importance of studying it. The concept and studies originated in the North

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American society, with President L. Johnson first using the term (Urse, 2008). Some authors attribute concerns about quality of life to the Brundtland Report (WCED, 1987) and its definition of sustainable development.

Various scientific fields are involved in studying aspects of quality of life, ranging from sociology and psychology to geography and economics, extending to demography and anthropology, architecture and urban planning, with extensive research in geography, urban planning and other spatial sciences (Tiran, 2016). The relationships between man and the environment are best expressed through human settlements, in terms of habitation and economic activities, which practically represent a synthesis of this interaction (Baltălungă, 2019). The interdisciplinary approach of the concept is quite common and finding a universally accepted definition is challenging. The term *quality of life* (QoL) is frequently used across various scientific disciplines to express the idea of personal well-being within a more complex framework than that related solely to financial income (Mella and Gazzola, 2015). Urban quality of life is a useful concept, overlapping with other well-being concepts such as human development, social quality, standard of living etc. (Mandič, 2005). Depending on the perspective of the field from which the study is conducted, there will be a particularity in the definition of the concept. Of all, beyond quantitative and qualitative analyses, geography can best capture and render the spatialization of phenomena, "differentiating itself from other sciences by using a spatial reference framework and studying the effect of the geographic environment on quality of life" (Pacione, 2003, p. 316); it can also correlate and synthesize the multitude of elements discussed, alongside analysing ecological issues arising within human settlements, social issues, health issues and those concerning leisure time and how it is spent. Due to a wide range of theoretical concepts, the terminology used for discussions about quality of life may be ambiguous or even vague (Biolek et al., 2017). Therefore, socio-geographic research on quality of life should start from understanding the reciprocal interaction between people and their environment (Andráško, 2009). The concept of *quality of life* includes both material aspects (housing, areas etc.) and non-material aspects (environmental quality, social relationships, state of health etc.). The process of identifying and quantifying these aspects and especially correlating them represents a complex and difficult endeavour mainly in terms of the representativeness of elements selected for analysis. Thus, studies related to quality of life should include the analysis of objective indicators (based on statistical data), on the one hand, and subjective/particular indicators (necessary to determine people's perception of quality of life), on the other hand. The past or present economic situation leads to hypotheses about the future situation (Dumitrescu, 2008). A distinction between these indicators, between these categories of aspects, has sometimes been made (for example, by the European Committee of the Regions – CoR, 1999), but only an integrated approach can provide a more accurate picture.

Quality of life can be considered the ultimate goal of sustainable development. Attempts have been made to integrate the two notions (quality of life and sustainable development) into a single concept in the specialized literature (Wiesli et al., 2021). On the other hand, some opinions suggest that the two notions may contradict each other, even becoming antagonistic at times. We support the idea that high quality of life is often accompanied by a significant negative impact on the environment, incurring high costs for its improvement. Objective well-being may or may not be compatible with environmental sustainability (Malkina and Pykh, 2016). The behaviour of one generation should not diminish the options of another generation (Rawls, 2009). From this perspective, it might be argued that this concept of *quality of life* can decisively contribute to managing local and regional development. Culture and territory should be integrated into any development model that, in order to be durable, must rest upon social cohesion (Mella and Gazzola, 2015). The conditions in which the population finds itself influence history (Dumitrescu, 2008).

In principle, in the initial phase, the improvement of quality of life is determined or even conditioned by economic development. "Quality of life includes all the goods and services, analysed quantitatively and qualitatively, benefiting the members of a human community" (Erdeli et al., 1999, p. 58). The challenge arises as this economic development entails a high consumption of resources (Săgeată, 2013). As a society becomes more complex, the domains of life become more sophisticated (Baltălungă, 2008). The standard of living should also be sustainable, which implies significant costs for all involved actors (citizens, local authorities, the business environment) (Greenwood and Holt, 2010). This involves not only financial costs, but also social and environmental costs. The general idea present in most analyses and studies in this field is that the benefits of improving the standard of living often bring about increased costs that can affect sustainable development.

According to the World Health Organization (WHOQOL User Manual, 1998, p. 11), quality of life consists of "an individual's perception of their position in life in the context of the culture and value system in which they live and in relation to their goals, expectations, standards and concerns…". The resulting approach is predominantly qualitative, based on perceptions, influenced by the natural, economic and social environment. While subjective, it is essential to complement it with normative and statistical elements.

The quality of life of European citizens is increasingly present in political debates and decisions at the European Union level (European Foundation for the Improvement of Living and Working Conditions), and any study in this field can and should contribute to improving living and working conditions. An example is the set of 11 "European Common Indicators" – an initiative supported by the European Commission and the European Environment Agency (1999). Current European policy concerns include raising living standards, improving living conditions, strengthening social cohesion and combating exclusion, all directly impacting quality of life (Eurofound, 2004). Notably, the European Union considers demographic changes as the most significant trend of the 21st century (Dumitrescu and Baltălungă, 2016).

The quality of housing represents a fundamental element of an individual's quality of life, encompassing both the conditions and characteristics of the residence and the conditions of the surrounding environment (natural and socio-economic) (Trudel, 1989; Vâlceanu and Zulaica, 2012). Housing represents the capacity of the habitat to meet the objective and subjective needs of an individual or group (Baltălungă, 2019). Urban Geography studies show that issues vary from one area to another within a city (Catană, 2012). Thus, the quality of human habitat greatly depends on the distribution of internal structural elements within a locality (Zotic et al., 2010).

From the perspective of environmental psychology, the "person-environment congruence" is considered to be highly significant in residential environments (Moser, 2009). This involves the interrelation between an individual and their environment.

The rapid dynamics with which contemporary society is changing require a constant update and reconfiguration of concepts, fields and indicators used, particularly considering the disparities or contradictions generated by social and economic development (Baltălungă, 2008).

The indicators used in urban quality of life analysis result from combining a state indicator (...) and an evaluation criterion indicator (...) (Vert, 2001). Developing indicators for assessing quality of life is a constant methodological concern at the international level.

Studies related to quality of life need to include the analysis of objective indicators (based on statistical data) and "subjective" indicators (based on questionnaires) necessary to determine people's perception of quality of life.

It may be said that, essentially, quality of life focuses on individuals and their needs and expectations related to their standard of living. In other words, quality of life refers to the overall well-being of individuals, of society members.

No study can aim to address all aspects related to quality of life due to their complexity and the multitude of dimensions they may take or directions in which they can be analysed. Working with quantitative methods increasingly involves identifying with geocomputation, geographic data science, urban analysis, urban data science, geoAI etc. (Franklin, 2023).

This study aims, from a geographical perspective, to combine a quantitative analysis of the dynamics of indicators strictly related to quality of life with a qualitative analysis based on residents' perceptions at a specific time. It also seeks to verify the existence of causal or reciprocal relationships between these aspects and the possibility of creating a model for analysing such sets of data and information.

THEORY AND METHODOLOGY

The City of Târgoviște is located in Dâmbovița County, Romania. It is the county seat (NUTS 3 - Nomenclature of Territorial Units for Statistics, Eurostat 2022, Code RO313), part of the South Region (NUTS 2, Code RO31) and of Microregion Three, respectively (NUTS 1, Cod (RO3) (figure 1). It is the third most important city in the South Region (NUTS 2, Code RO31). Documented since 1396, it was the capital of the feudal state Wallachia for three centuries.

It has a population (by residence) of 89,253 inhabitants as of 1 July 2022 (98,660 inhabitants in 1992 and a peak of 100,813 inhabitants in 1997) and an area of 53.47 km^2 (according to the General Urban Plan revised in 2021), of which 21.60 km^2 built-up area (Național Institute of Statistics, 2023), resulting in an average population density in the built-up area of 4,132 inhabitants/km^2. Green spaces – approximately 11 m^2/inhabitant in the built-up area.

This study aims to conduct a quantitative analysis of the dynamics of indicators strictly related to quality of life, from a geographic perspective, and a qualitative analysis from the perspective of residents' perceptions at a given moment. Thus, the proposed analysis combines quantitative methods and aspects, including the study of the dynamics of time series data (related to housing and its quality, - the dynamics of the number of dwellings, their area, the number of rooms per dwelling, the number of inhabitants per dwelling, the habitable space per dwelling and per inhabitant, respectively), with qualitative methods and aspects achieved by applying the questionnaire as a survey method. Opinion polling is a method of understanding public opinion based on sampling and a questionnaire (Baltălungă, 2019).

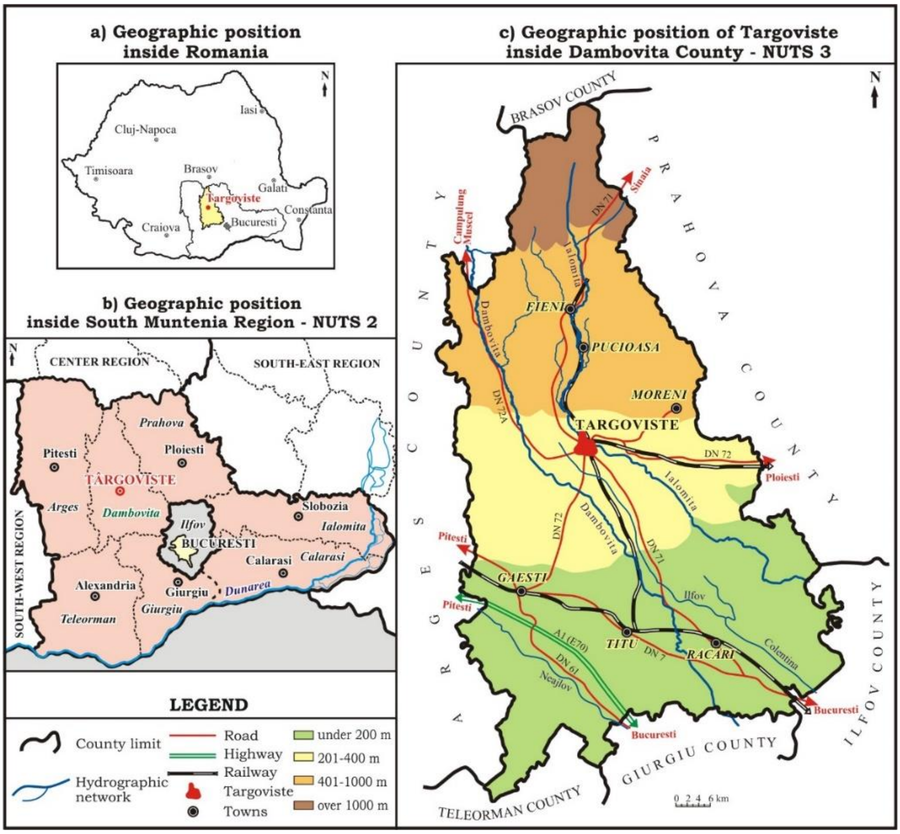

Figure 1. Geographic position of Târgoviște City

Figure 2. Târgoviște City
(Source: Florian Ispas, 2018)

Statistical data used are provided by the National Institute of Statistics via its website. The questionnaire consisted of 10 questions: two related to personal income; two about satisfaction with housing quality; three questions related to social aspects; two questions regarding environmental, cultural and recreational aspects; and a synthesis question, the last one, open-ended, related to measures considered necessary to improve the quality of life.

The sample structure considered gender, age group - adults over 18 years old (18-40 years 34.27%, 41-60 years 38.14%, 61 years and over 27.59% - figure 3 and 4), profession/occupation (8 categories, table 1) and education level (6 categories, from no education to post-graduate studies) - Table 2. The real structure of the city's population was respected, and the sample was proportional to the population in these respective categories. All interviews were anonymous and conducted face-to-face in the field. A total of 521 questionnaires were applied, which means that, under a 95% probability, the margin of error is 4.1%, or in the case of a 90% probability, the results are guaranteed with a maximum error of 3.5%, meaning there is a 90% probability that the responses represent the population's opinion, with a margin of error of up to 3.5%.

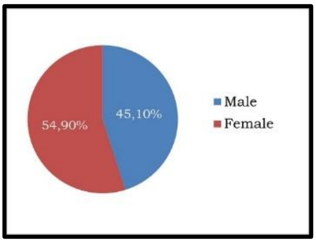

Figure 3. Sample structure by gender

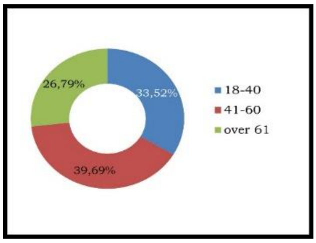

Figure 4. Sample structure by age group

Table 1. Sample structure by occupation

Profession/Occupation	**No.**		**%**	
Gender	**M**	**F**	**M**	**F**
farmer	9	8	1,74	1,55
industry	19	6	3,66	1,17
construction	30	4	5,78	0,78
trade and other services	41	86	7,89	16,52
education/healthcare	14	47	2,70	9,04
pensioner	66	63	12,69	12,11
student	33	37	6,35	7,12
other (unemployed)	23	35	4,16	6,74
Total	**235**	**286**	**45,10**	**54,90**

Table 2. Sample structure by education level

Education	**No.**		**%**	
Gender	**M**	**F**	**M**	**F**
no education	3	3	0,57	0,57
primary and middle school	22	33	4,28	6,33
vocational school	49	29	9,48	5,55
secondary/post-secondary	112	136	21,36	26,14
university	41	75	7,88	14,40
post-graduate	8	10	1,53	1,92
Total	**235**	**286**	**45,10**	**54,90**

The connection between the previously mentioned quantitative and qualitative aspects was made by verifying whether or not there were correlations between statistical indicators (two sets of data and three sets of calculated indicators were grouped into four pairs) and the population's perception (the 9 closed questions of the questionnaire were also grouped into four categories). This was done using Microsoft Excel (the *Correl* function). The equation for the correlation coefficient is (Correl feature – Microsoft Support) (1):

$$1. Correl\ (X,Y) = \frac{\Sigma\ (x-\bar{x})(y-\bar{y})}{\sqrt{\Sigma\ (x-\bar{x})^{\,2}\ \Sigma\ (y-\bar{y})^{\,2}}}$$

where x and y are the means for the samples, AVERAGE(array1) and AVERAGE(array2).

The closer its value is to +1, the higher the correlation, while a value closer to -1 indicates a negative correlation. A positive correlation means that if the values of one set of indicators increase, those of the second set will also increase. A negative correlation means that high values of one matrix are associated with low values of the other. If the value is 0, there is no linear correlation.

Subsequently, apart from correlation (in certain cases), the causal relationship, and a predictive analysis for and between the questionnaire questions were conducted through linear regression, also using Microsoft Excel. The equation for the slope of the regression curve is (2):

$$2. b = \frac{\Sigma\ (x-\bar{x})(y-\bar{y})}{\Sigma\ (x-\bar{x})}$$

where x and y are the means for the samples, AVERAGE (known_x's) and AVERAGE (known_y's). This refers to the *slope* function – "the slope is the ratio of the vertical distance to the horizontal distance between any two points on the line and represents the rate of change along the regression curve" (Slope function – Microsoft Support).

Multivariate statistical methods, such as correlation, linear or multiple regression analysis, structural equation modelling etc., have been previously used in similar survey-based research (McCrea et al., 2005; Marans and Kweon, 2011; Tiran, 2016 etc.) or even in interdisciplinary studies tackling the connection between subjective well-being and sustainable environmental development (Malkina and Pykh, 2016).

RESULTS AND ANALYSES

Statistical Indicators

In the first part of the study, a series of statistical data (table 3 - items 1 and 2) were analysed, as well as a series of housing-related indicators calculated based on statistical data (items 3, 4 and 5).

As regards the *number of dwellings*, a very clear upward trend is recorded (figure 5), accentuated after 2010 when the effects of the economic crisis began to diminish. Compared to the beginning of the analysed interval (1990), the increase was approximately 15%. In contrast, the *habitable space* (figure 6) increased much more, by about 62%, as emphasized by the indicator at position

3 (table 3), *habitable space per dwelling*, indicating an average increase of 41%. This is a general national trend explained by people's desire for larger homes after the experience of the communist period when most were small in size and especially communal block-type housing.

Table 3. Housing quality indicators
(* *Data source:* http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table – B10)

No.		1990	1995	2000	2005	2010	2015	2021
1.	No. of dwellings*	32.593	32.342	32.696	33.749	34.034	36.198	37.277
2.	Habitable space (m^2)*	1.053.278	1.119.371	1.141.924	1.275.122	1.301.591	1.627.359	1.702.757
3.	Habitable space / dwelling (m^2)	32,31	34,61	34,92	37,78	38,24	44,95	45,67
4.	No. of inhabitants / dwelling	3,05	3,11	3,05	2,93	2,85	2,59	2,42
5.	Habitable space / inhabitant (m^2)	10,56	11,10	11,43	12,88	13,41	17,30	18,84

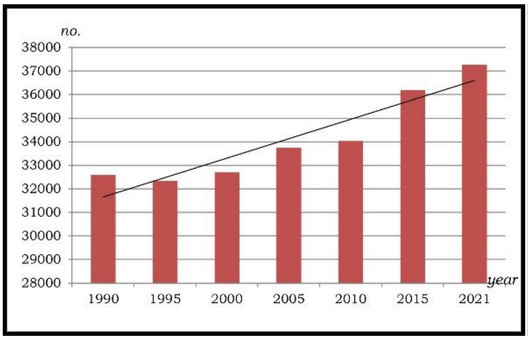

Figure 5. Dynamics of the number of dwellings (1990-2021)

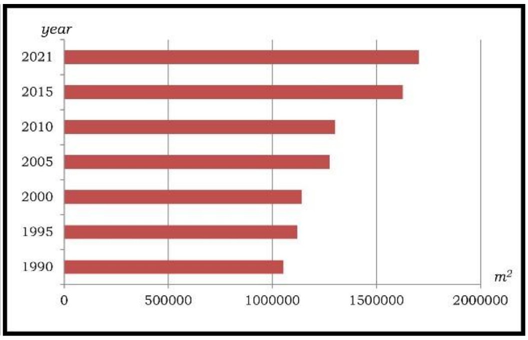

Figure 6. Dynamics of habitable space (1990-2021)

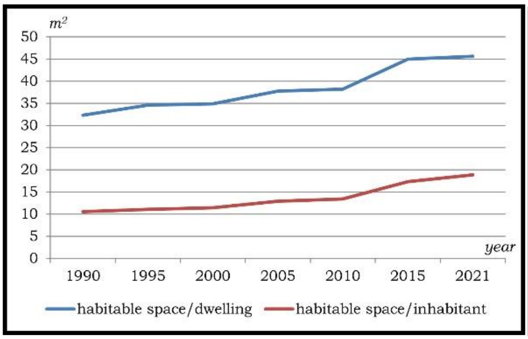

Figure 7. Dynamics of habitable space/dwelling and of habitable space/inhabitant (1990-2021)

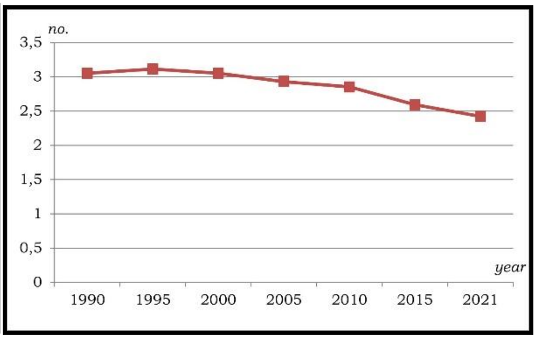

Figure 8. Dynamics of the number of inhabitants /dwelling (1990-2021).

In parallel with the increasing values presented above, a decrease in the *number of inhabitants per dwelling* is observed, approximately 20%, explained on the one hand by the increase in the number of dwellings and on the other hand by the decrease in the number of inhabitants (about 10% compared to the maximum number of inhabitants, a consequence of the decrease in natural growth and high external migration). Even in this context, the decrease in the number of inhabitants per dwelling contributed to the improvement of quality of life.

The dynamics of the above indicators led to a spectacular increase in the indicator at position 5 in table 3, i.e., *habitable space per inhabitant*, from 10.56 m^2 to 18.84 m^2, i.e., 78.40%, which from the perspective of quality of life is a remarkable fact.

Data and Statistical Indicators Correlation

With regard to data and statistical indicators, pairs of values from table 3 were compared, and the correlation coefficient between them was calculated using Microsoft Excel (the Correl *function*), as follows:

- *a.* the number of dwellings and habitable space (figure 9). The correlation between *number of dwellings* and *habitable space* = 0.989961748;
- *b.* the number of inhabitants per dwelling and habitable space per inhabitant (figure 10). The correlation between the *number of inhabitants/dwelling* and *habitable space/inhabitant* = 0.99069;
- *c.* habitable space and habitable space per dwelling (figure 11). The correlation between *habitable space* and *habitable space/dwelling* = 0.99677;
- *d.* habitable space per dwelling and the number of inhabitants per dwelling (figure 12). The correlation between *habitable space/dwelling* and *number of inhabitants/dwelling* = 0.965463.

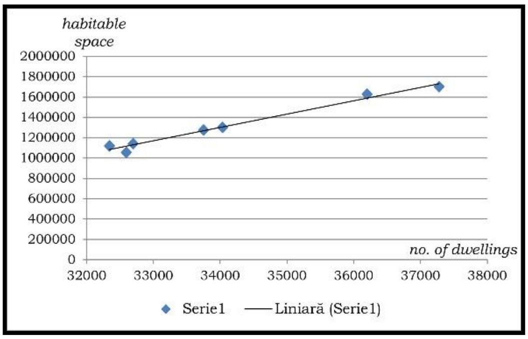

Figure 9. The correlation between the *number of dwellings* and *habitable space*

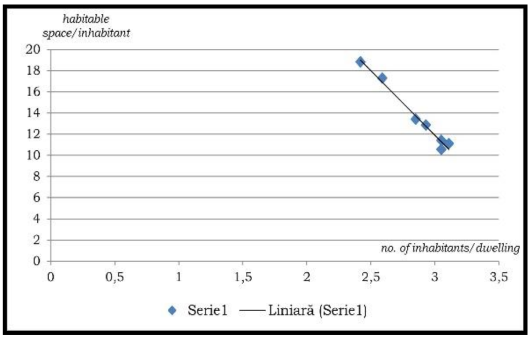

Figure 10. The correlation between the *number of inhabitants/dwelling* and *habitable space/inhabitant*

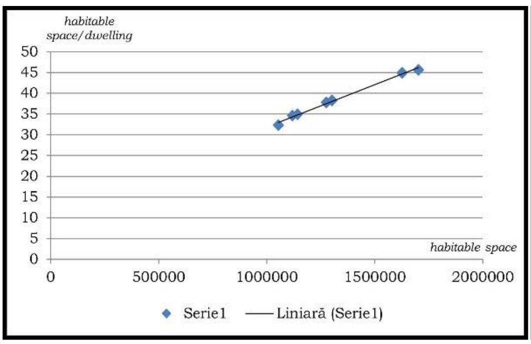

Figure 11. The correlation between *habitable space* and *habitable space/dwelling*

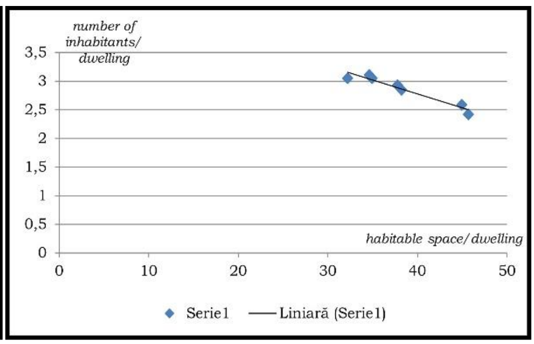

Figure 12. The correlation between *habitable space/dwelling* and *number of inhabitants/dwelling*

The strongest correlation is between *habitable space* and *habitable space/dwelling*, and the lowest is established between *habitable space/dwelling* and *number of inhabitants/dwelling*, with the mention that even the latter has a high value. Practically, all show correlation coefficient values above 0.95, meaning that if the values of one set of indicators increase or decrease, the values of the other set will also increase or decrease. Thus, in this regard, it should be noted that in cases *a.* and *c.* (figure 9 and figure 11), the correlation is direct-positive (increase), while in cases *b.* and *d.* (figure 10 and figure 12), there is an inverse-negative correlation (decrease).

Questionnaire

The first aspects considered were related to income, the status of which was suggested by the responses to the first two questions.

Question 1 (*Are you a homeowner?*) - 63.26% answered *yes*, and 36.74% answered *no*. The resulting values are below the national average.

Question 2 (*Are you a car owner?*) - 48.07% of respondents answered *yes*, and 51.93% answered *no*. In this case, the values are above the national average.

The questions related to the level of satisfaction/contentment regarding housing quality received the following responses:

- *Question 3* (*Degree of housing satisfaction*) - the majority of respondents declared a *high* degree (49.42%) of satisfaction and a *medium* degree (45.19%), while only 5.39% indicated a *low* degree of satisfaction with their own housing. If adult women predominate in the category of those with a *high* and *medium* level of satisfaction (56.81%), in the category of those with a *low* degree of housing satisfaction, the majority are young men, with a proportion of 57.14%;

- *Question 4* (*Degree of neighbourhood satisfaction*) - the same response options were available, and the results predominantly show a *medium* level of satisfaction (58.73%), while only 30.32% indicated a *high* degree of satisfaction with the neighbourhood. Among those with a high level of satisfaction, in terms of gender, adult women predominate (52.5%), as well as those who have indicated a *medium* level of satisfaction with the neighbourhood (57.19%). The highest degree of dissatisfaction was recorded among young and elderly male adults.

For questions related to social aspects (5, 6, and 7), the responses were as follows:

- *Question 5* (*Are you satisfied with urban services and facilities?*) - respondents had to choose among three answer options – *yes*, *no* and *don't know*. A slight majority declared that they are satisfied (54.12%), 30.32% responded negatively, while 15.56% were undecided. The most satisfied citizens with urban services and facilities are women aged 41-60, while the most dissatisfied are both female and male aged 18-40 (young adults), who have higher expectations regarding the modernization of the city, and elderly adults, for whom the requirements are much higher and the offers limited.

- regarding the level of satisfaction with the quality and access to healthcare services (*Question 6*), the majority of respondents express a high degree of dissatisfaction (57.70%).

- *Question 7* (*How do you assess personal and public safety in Târgoviște City?*) - the majority of respondents have a *satisfactory* (48.27%) or *good* (32.95%) assessment. However, it is essential to note the high percentage of dissatisfied individuals, approximately 19%, which is the third-highest percentage of negative responses. The highest satisfaction level is once again recorded among adult and elderly women, while young adult women consider personal and public safety to be unsatisfactory (40.10%).

As for *Question 8* (*Are you satisfied with the quality of the environment in Târgoviște City?*), the majority of interviewed individuals (63.26%) expressed satisfaction, while the proportion of dissatisfied individuals is quite high, 36.74% (ranking second in dissatisfaction).

In terms of satisfaction with the cultural life of the city (***Question 9***: *Are you satisfied with the cultural/recreational opportunities/activities offered by the city?*), the majority have a positive opinion (66.41%), while the rest are either dissatisfied (13.74%) or undecided/indifferent. The most satisfied respondents are women aged 41-60. The most dissatisfied individuals are from the category of young adults (32.47%) and the elderly (29.18%), whereas the most indifferent are elderly adults.

Question 10, the last one in the questionnaire (*What measures do you consider necessary to improve the quality of life in Târgoviște City?*), the only open-ended question, received a wide variety of responses grouped by neighbourhoods, gender, age groups, education level and occupations. The aim of the question was to identify citizens' public agenda priorities, both at the neighbourhood and city levels. Responses were extremely diverse, finally grouped into 7 main domains (alongside "others" and "don't know"): urban regeneration (major concern for 24.6% of respondents), environmental quality (13.14%), urban mobility (12.50%), socio-cultural and recreational infrastructure (10.55%), social and economic measures (10.03%), public health (9.89%), trust in local public administration (6.40%), others (3.00%), don't know (9.88%).

The analysis of responses by gender reveals that young and adult women are primarily concerned with urban services, living standards, urban safety and the quality of health services, while elderly women focus on social measures and the integrity of the administration. On the other hand, young and adult men are more interested in the quality of urban services and living standards, and seniors are concerned with personal safety, the quality of health services and green spaces.

With respect to the level of education, respondents with a low level of training are more concerned about living standards, social and health services, while those with high school or university/postgraduate studies focus on environmental quality. A common dissatisfaction among respondents, regardless of gender, age and education level, is related to the integrity of the local administration, with extremely low satisfaction levels.

Students are more concerned with waste collection, recreational spaces and infrastructure. Respondents employed in education and healthcare express concerns about pollution, cleanliness, cultural and educational facilities, those working in agriculture, industry, construction and most of the tertiary sector - about urban services and the integrity of the local administration, while the unemployed and those without occupation focus on urban facilities and social services.

Linear Regression Analysis

In the case of questionnaire questions, aiming to yield a predictive model based on causality relationships, an analysis of responses was conducted through linear regression. Responses were grouped into matrices of three rows and three columns based on age and gender, as well as the number of answer options (figure 13 A).

In the first analysed case, questions 3, 4 and 7 were considered. Thus, in terms of correlation, all exhibit high values (close to +1), indicating a strong correlation. The highest value is recorded between questions 4 and 7, followed by approximately equal values for questions 3 with 4 (figure 13 B) and 3 with 7 (figure 13 C). Predictive analysis through the linear regression slope confirms a closer causal relationship between questions 4 and 7 (figure 14 D) and a (perhaps surprisingly) less close relationship between questions 3 and 4 (figure 13 B).

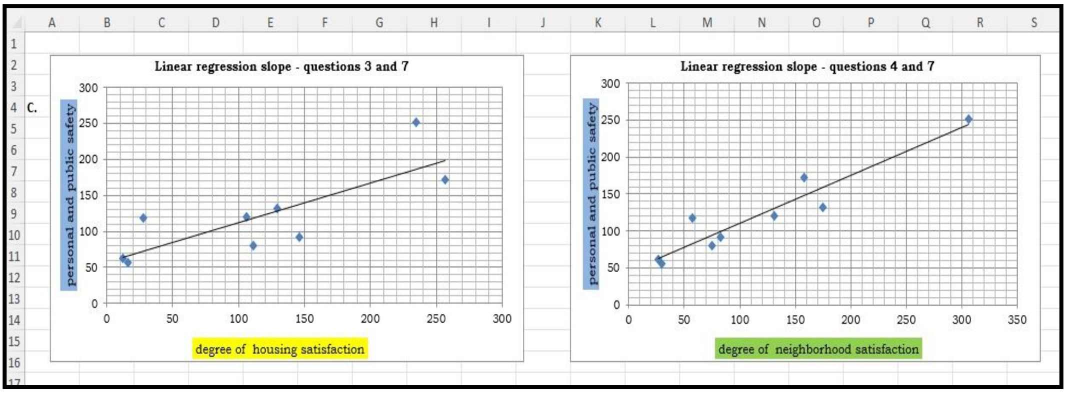

Figure 13. – A: Synthesis of answers to questions 3, 4, 7
B: Linear regression slope - questions 3 and 4

In other words, the highest correlation is between the degree of neighbourhood satisfaction and personal and public safety, a fact also confirmed by a close causal relationship. However, there is no confirmed close direct causal relationship between housing satisfaction and neighbourhood satisfaction.

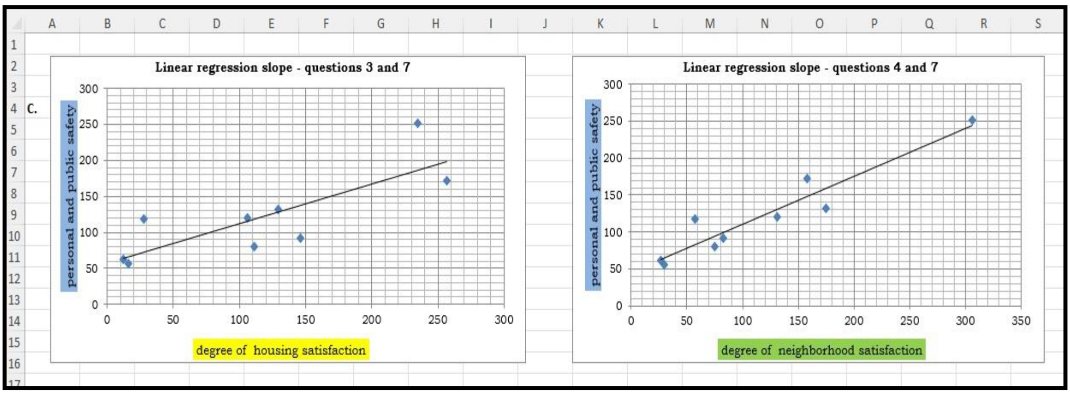

Figure 14. – C: Linear regression slope - questions 3 and 7
D: Linear regression slope - questions 4 and 7

The same analysis applied to questions 5 and 9 reveals a good correlation but a diminishing causal relationship trend (figure 15). It indicates that the possibility of engaging in cultural and recreational activities correlates well with satisfaction with urban services and facilities, complementing the latter, but they, in and of themselves, do not constitute a cause that determines this level of satisfaction.

Question 5			*yes*			*not*			*not know*		
		M	F	T	M	F	T	M	F	T	
	18-40	33	62	95	29	27	56	14	8	22	
	41-60	51	65	116	21	33	54	13	24	37	
	61+	29	42	71	29	19	48	13	8	21	
	Total	113	169	282	79	79	158	40	40	80	
											slope
Question 9			*yes*			*not*			*not know*		0,73937
	18-40	44	69	13	17	15	32	17	15	32	
	41-60	65	81	146	4	15	19	23	21	44	
	61+	42	47	89	11	10	21	16	12	28	
	Total	151	197	348	32	40	72	56	48	104	
Total *Question 5*		113	169	282	79	79	158	40	40	80	slope
Total *Question 9*		151	197	348	32	40	72	56	48	104	0,67183

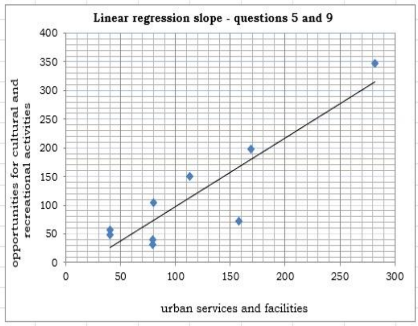

Figure 15. – Synthesis of answers to questions 5 and 9
Linear regression slope – questions 5 and 9

Regarding a potential connection between the answers to questions 6 and 8, the analysis indicates a good correlation and the existence of a causality relationship (slope = 0.724448). Therefore, the citizens of Târgoviște identify both a good correlation and a causal relationship between health-related aspects and those related to the environment.

The analysis and correlated interpretation of data and statistical indicators with the residents' perceptions obtained through the questionnaire has allowed the identification of trends and the formulation of conclusions regarding citizen and local community issues, issues related to the environment and the quality of life.

In the case of the level of neighbourhood satisfaction, a significantly lower proportion of individuals exhibit a high degree of satisfaction compared to housing satisfaction. Although respondents are satisfied with their homes (a result of their own choices, aspirations and financial possibilities), they are dissatisfied with the quality of the neighbourhood (which depends less on citizens and more on the responsibility and results of the activity of local authorities).

Personal and public safety represents a more pronounced concern among women.

Access to and quality of healthcare services top the list of dissatisfactions among those interviewed.

Regarding environmental quality, the majority of respondents express satisfaction. In the case of dissatisfied individuals, young people predominate, potentially reflecting the more intense environmental education provided both in schools and through mass media. A similar explanation, related to school education, may be valid for the elderly, who rank second among the dissatisfied.

Moreover, most citizens are satisfied with the recreational opportunities and cultural activities provided by the city. Overall, the active population is either satisfied or less interested, possibly due to limited leisure time for such activities. Additionally, this group expresses the highest satisfaction with their own housing, possibly explained by spending a larger portion of leisure time at home.

Access to healthcare services, their quality, environmental aspects and personal and public safety emerged as the most important issues based on the proportion of those dissatisfied in the case of the first nine questionnaire questions.

CONCLUSION

As regards the correlation between responses to questions, the one between neighbourhood satisfaction and personal and public safety stands out, confirmed by an increase in personal and public safety with the rising satisfaction with the neighbourhood. However, a less pronounced causality relationship is observed between housing satisfaction compared to neighbourhood satisfaction degree.

The level of satisfaction with urban services and facilities correlates with satisfaction regarding cultural activities and recreational opportunities, but an increase in the former does not automatically result in an increase in the latter.

On the other hand, response analysis indicates a connection between the degree of satisfaction with the quality and access to healthcare services and environmental quality, which is tighter than the one mentioned earlier between urban services and facilities and cultural activities and recreational opportunities.

Overall, some inconsistencies can be observed among the responses to the first nine questions (suggesting an overall positive image) and the last question (indicating a city with multiple issues to address despite appearances). A possible cause may be the respondents' subjectivity, potentially explained by the fact that the last question was open-ended.

Sustainable communities, especially successful ones, should incorporate the perspectives of those living in that area – as they are part of the urban design dialogue.

Analysing all aspects mentioned by the citizens who answered the questionnaire questions reveals the need to create *urban islands*, especially in neighbourhoods located far from the city centre, which will contribute to improving the quality of life.

The arrangement and remodelling of public spaces – squares, plazas, parks, playgrounds, urban furniture etc., are aspects that remain in citizens' focus and can be correlated with the aforementioned urban islands.

The causes of the negative aspects captured in the responses of interviewed residents can be grouped into three major categories: *citizen behaviour* (ignorance, indifference, lack of education), *weak institutions* (inefficiency, incompetence, corruption) and *inadequate* or *unenforced legislation*. It is true that a small portion of the expressed dissatisfaction (below 20%) falls outside the local authorities' competence.

Issues regarding urban regeneration and remodelling (infrastructure and lack of green spaces – the creation of green spaces is considered imperative), environmental quality issues (pollution, cleanliness and waste collection) and urban mobility issues (parking, traffic/circulation and public transport – urgent real solutions are demanded to address traffic congestion and parking issues) have been particularly noted.

A crucial conclusion from question 10 is *the necessity of including community feedback in the urban planning process*. Consulting citizens is no longer optional and should be done every time and with great seriousness, with a genuine desire to understand the perspective of those involved and to take it into account. Additionally, city residents believe they have the right to contribute to changes in the built environment of their neighbourhood and city.

The high proportion of answers such as *don't know*, *no answer* etc. reveals a lack of self-perception in assessing individual needs, a low level of education and information (Târgoviște experienced significant development during the socialist industrialization period, and this evolution explains or is reflected in the behaviour, attitude and mentality of its inhabitants).

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MODEL OF ADMINISTRATIVE-TERRITORIAL ORGANISATION USING THE CONCEPT OF GEOGRAPHICAL AXIS. CASE STUDY: HYDROGRAPHIC AXIS BISTRIȚA ARDELEANĂ-ȘIEU

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Abstract: The socio-economic need for reorganisation of Romania's territory serves as the main objective in developing a model of administrative-territorial organisation based on a geographical axis, which can be highly useful in understanding and managing resources and regional development more efficiently. In the case of the hydrographical axis Bistrița Ardeleană -Șieu, the development and interaction located along this axis are investigated. At the level of Bistrița-Năsăud County, the design of the UAT (administrative-territorial unit) Bistrița Ardeleană-Șieu, which includes the following UATs, is analysed: Tiha Bârgăului - spring area and Colibița Lake, Bistrița Bârgăului, Prundu Bârgăului, Josenii Bârgăului, Livezile, Municipality of Bistrița, Unirea, Șieu-Măgheruș - Sigmir area, Viișoara, Sărata, Șieu - Sărățel area, where the river flows into the Șieu. Șieuț - spring area Șieu Mărișelu, Șieu-Măgheruș, Șintereag, Cociu area, where it flows into the Someșul Mare. Fusion of 16 UATs into a single UAT called Bistrița Ardeleană-Șieu, with Bistrița at its centre. Due to its economic expansion and geographical location, the city was chosen as the central hub and focal point of the new administrative unit within the county. The study represents the continuation of the Someșul Mare UAT organisation model. Along their course, the hydrographic axis is intersected by roads DJ173A, DJ154, DJ151, DN17, DN15A, and railroad CFR 400/406, which contribute to connectivity by facilitating access between localities and enhancing regional connectivity.

Key words: Geographical axis, UAT Bistrița Ardeleană-Șieu, Model of administrative-territorial organisation, UAT Someșul Mare, Romania

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INTRODUCTION

The study is part of a larger research aiming to develop a model of territorial administrative organisation based on the concept of hydrographic axis applied to the county of Bistrița-Năsăud.

It analyses the organisation of the county in 4 major hydrographic axis:

- Bistrița Ardeleană-Șieu Axis ;
- Someșul Mare Axis (Tătar, 2024);
- Sălăuța Axis ;
- Bârgău Axis (Tiha).

The terms “rural” and “urban” refer to spatial realities that have often been interpreted as opposed, or even antagonistic and divergent (Champion al., 2004; Molinero, 2021), from a dichotomous binary perspective based on alterity to the urban environment. This approach not only represents a simplification in various respects but also expresses a non-existent homogeneity of rural and urban spaces as if there were only one model of each category.

The spatial reality is much more complex than the above notion. Moreover, this complexity is increasing, and a complete understanding of the question would require multiple interdisciplinary analyses. This is particularly so today, when hybrid spatial environments (Sáez, 2021) and numerous multifunctional rural landscapes are taking shape (Banzo, 2005).

The urban area and the rural zone are organic components of the regional system. They are interdependent, integrated, and complementary (Liu et al., 2023). The complex urban-rural relationship refers to the symbiotic interaction between urban and rural areas that affects each system. It is the most basic economic and social relationship in the development of human society, and it is also an important relation that must be dealt with in regional development and political organisation (Liu et al., 2023).

Urban-rural interaction is manifested in the flow of material, capital, personnel, information, and technology resources between urban and rural areas (Liu et al., 2023). The geographical axis model shows urban-rural interaction efficiently.

The development of a model of territorial reorganisation based on the concept of geographical axis is being investigated. Proposed model: U.A.T. Bistrița Ardeleană-Șieu. The geographical axis is defined as a ”line of spatio-temporal shape, a line that allows, in a temporo-spatial way, the diagnosis and geographical forecasting of a territory, a territory that can take different geometric conformations, and dimensions according to the capacity of component polarisation” (Pop, 2003).

Grafting the territorial planning activity in practice, for example, within the axis, must respond to the elaboration of the main indicators in the development and geographical harmonisation of the territory by Pop (2004): the study of natural, social and economic conditions. The geographical and social axis are concentrated and spread to and from the poles of development, the flows of population, goods, capital and information, thus playing an important role in their development and dynamics (Pop, 2016).

Thus, the hydrographical axis Bistrița-Ardeleană-Șieu is characterised as a geographical axis that meets the mentioned conditions and presents geographical continuity in the studied territorial area. Rivers are commonly used to define political boundaries, and rivers can be used as a structure in territorial delimitation at the sub-national scale (Popelka and Smith, 2020).

The importance of the territorial organisation along the contours of the river Bistrița Ardeleană and Șieu is given by the relationship between the hydrological unit and the communities. Rivers connect people, places and other forms of life, inspiring and sustaining diverse cultural beliefs, values and ways of life. Although the views emerging from socio-hydrology and the hydro-social cycle are based on different paradigms of knowledge, they are rooted in the basic idea that water systems-like rivers, and society co-evolve and emerge through continuous engagement in space and time (Anderson et al., 2019).

Ethnographic studies of common water systems and their communal water management institutions have also contributed to such understanding (Anderson et al., 2019).

The territorial reforms are based on the performance, administrative and organisational power of localities (Ebinger et al., 2019). It is important to note that this results from their organisational and resource capacity and their room for manoeuvre in terms of finance, policy, organisation, staffing, etc. On the other hand, they can solve local problems and influence social developments in the territory in the long term.

This includes the ability to perform public tasks by improving quality, accessibility, legitimacy and efficiency (administrative strength) as well as to act as a strong carrier of public institutions (organisational strength) (Ebinger et al., 2019). By outlining administrative-territorial units (UAT), the administrative performance and capacity of Someșul Mare (Tătar, 2024) and Bistrița Ardeleană-Șieu increase.

METHODOLOGY

In the realisation of the article, the geographical axis method is used, which fulfils material, energetic, informational and relational functions (Figure 1). The geographical axis method is used to investigate territorial tasks: settlements, administration, population and demography.

It outlines the model of a territorial administrative unit based on the hydrodiversity of the Bistrița Ardeleană and Șieu River, which is characterised by human activities (forestry, agriculture, hydrographic planning, water supply, energy industry, fishing, recreation, etc.) carried out between settlements.

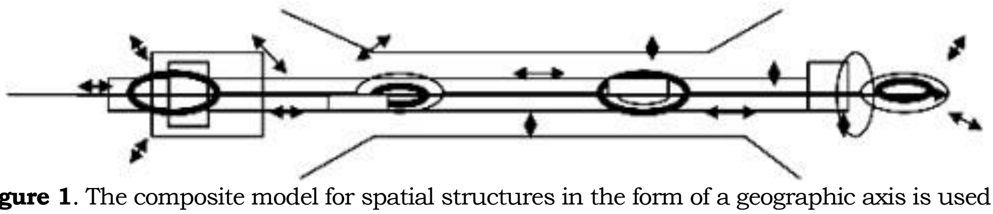


Figure 1. The composite model for spatial structures in the form of a geographic axis is used in the structural realisation of the U.A.T. Bistrița Ardeleană-Șieu (Pop, 2016, pp. 286-287)

The geographical element where the geographical axis is built is the rivers Bistrița Ardeleană and Șieu.

- Urban center: Bistrița;
- Towns and villages under the influence of urban poles;

- connecting road and railway: DJ173A, DJ154, DJ151, DN17, DN15A.

The railroad crossing near the hydrographic axis Bistrița Ardeleană-Șieu is the Dej-Bistrița Railway, part of the CFR 400/406. It crosses the northern part of the Transylvanian plateau and follows the courses of the rivers Someș, Șieu and Bistrița Ardeleană. Proximity:

  - In the Arcalia-Sărățel area, the railway line crosses or is less than 500 m from the river Șieu.
  - In the Bistrița Nord area, the railway comes within less than 1 km of the Bistrița Ardeleană river.
  - In the Beclean pe Someș area, the railway runs parallel to the Someșul Mare river, at a distance of about 300-800 meters.
  - Route details: Important points on the route: Dej, Beclean pe Someș, Șintereag, Măgheruș Șieu, Arcalia, Sărățel, Viișoara, Bistrița Nord.
  - Rivers crossed: Someșul Mare, Șieu, Bistrița Ardeleană.
  - Importance: It is an essential rail route for freight and passenger traffic between northern Transylvania and the centre of the country. The Dej-Beclean section is electrified and double-track, while the Sărățel-Bistrița.

- Social and economic activities between rural localities and urban centres, Bistrița centre pole of UAT Bistrița Ardeleană-Șieu and Bistrița-Năsăud county.

Geographical space - administrative units – social and economic trades - communication routes (road, road transportation, railway).

RESULTS

To provide a good organisation, the research results are structured as follows: I. Descriptive analysis of the Bistrița Ardeleană, Șieu Rivers and the territorial units crossed by the hydrological unit; II. UAT Bistrița Ardeleană-Șieu.

I. A-Bistrița Ardeleană

The Bistrita River is a right tributary of the Sieu water course, both of which are part of the Somesul Mare river basin. The hydrographic basin of the Bistrita Ardeleana watercourse has an area of 650 km^2. It springs from the central group of the Eastern Carpathians, and subsequently, its riverbed crosses the hills of Bistrita, continuing through the Bistrita depression. The Bistrita hydrographic basin incorporates the Tanase, Bargau, and Bistrita hydrographic sub-basins. The weir that is the main objective of this article is located at 10,866 km per watercourse, upstream of the confluence of the Bistrita River with the Șieu River (Moldovan et al., 2022) (Figure 2). The Bistrița River has its source in the Bistricior massif from the Călimani Mountains, drains the eastern part of the Colibița Depression (Mița basin) and flows into the reservoir, from where, under the dam, it crosses over a length of 7 km the gorge sector, after which it continues its course to the confluence with the Șieu river, at Sărățel (Bâca et al., 2013) (Figure 3).

Lake Colibița is of anthropogenic origin and occupies the western compartment of the Colibița Basin, being formed by the accumulation of the Bistrița Ardeleană river behind a rock (andezite), built between Dealu Pușcă (1081 m) and Capu Dealului (1051 m). The hydrometric parameters of the lake are significant and show its potential to support tourism and water sports activities (Bâca et al., 2013).

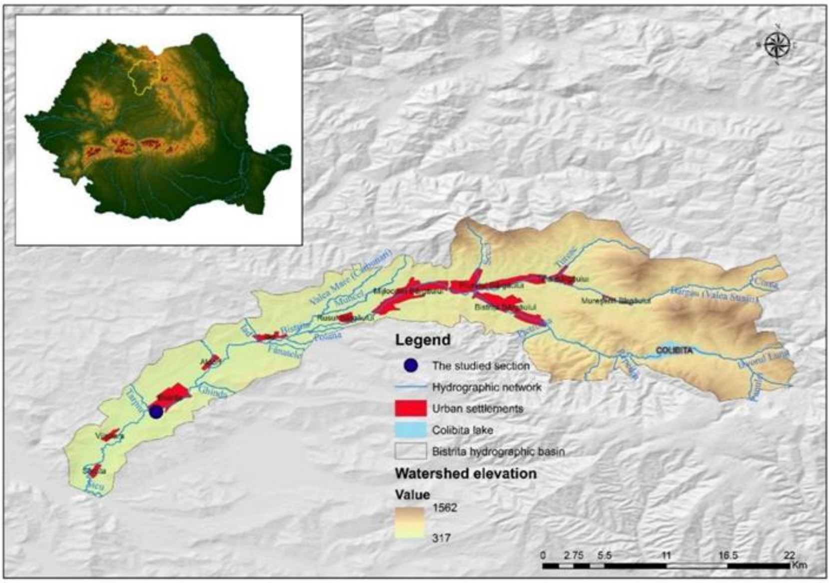


Figure 2. The Bistrita Ardeleana River Basin: location, limits, hypsometry, hydrographic networks (Moldovan et al., 2022)

Figure 3. The river-basin system Colibița Lake - Bistrița Ardeleană River (Bâca, et al., 2013, p.112)

Due to its touristic and energetic potential, Lake Colibița represents a strategic element in the development of the Administrative-Territorial Unit Bistrița Ardeleană-Șieu, contributing to the consolidation of the ecological and economic identity of the region.

I. B-Șieu

The Şieu River`s spring is located in the northwestern Călimani Mountains, below the Poiana Tomii Peak. The course is on a northeast-southwest direction for about 15 km, and then, in the perimeter of the village, it suddenly changes flow direction Şieu of to the northwest. Şieul drains the depression and Depression Budacu Şieu, depression bounded to the North by Small Hills. Culmea Şieului and Lechinței Hills are the southwestern limit of the Şieu River basin. The River drains an area of 1817 km^2. Şieul is one of the tributaries of the River Someşul Mare (Cristea, 2012).

The Șieu River, a tributary of the Someș Mare, has several secondary tributaries, excluding the Bistrița Ardeleană River. These are:

- Left tributaries: Șieuț, Lechința, Bretea, Agriș
- Right tributaries (excluding Bistrița Ardeleană): Recele, Ardan, Măgura Budac, Măgheruș, Rosua.

These tributaries contribute to the hydrographical network of the river Șieu and play an important role in shaping the relief and in the organisation of the urban and rural space in Bistrița-Năsăud County.

II. Bistrița Ardeleană-Șieu Territorial Administrative Unit (U.A.T. Bistrița Ardeleană-Șieu)

The administrative borders of the new territorial formations are based on the boundaries of the local territorial units that are located within the hydrographic axis Bistrița Ardeleană-Șieu (Figure 4).

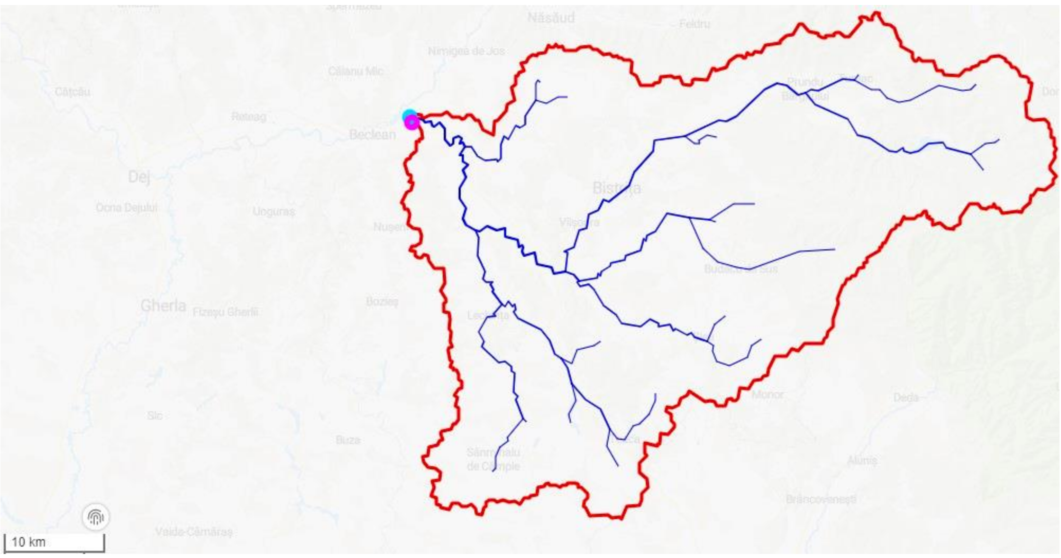


Figure 4. Delimitation of the administrative-territorial unit Bistrița Ardeleană-Şieu with the Cociu trading point (Alexandru Marius Tătar realised in https://mghydro.com/).

The administrative reorganisation model is carried out at the level of Bistrița-Năsăud county; the political-administrative structure does not aim at the abolition of the county but at the economic efficiency of the administrative apparatus. The new structure respects the law NO. 290 of 29 November 2018 for the modification and completion of Law no. 2/1968 on the administrative Model of Administrative-Territorial Organisation Using the Concept of Geographical Axis. Case Study: Bistrița Ardeleană -Șieu Hydrographical Axis organisation of the territory of Romania, published in Official Monitor number 1052 of December 12, 2018.

Bistrița becomes the administrative centre of the Bistrița Ardeleană-Șieu UAT, thus creating a dual role: centre of the county and the centre of the new UAT. This dynamic presents economic potential that allows the county to develop.

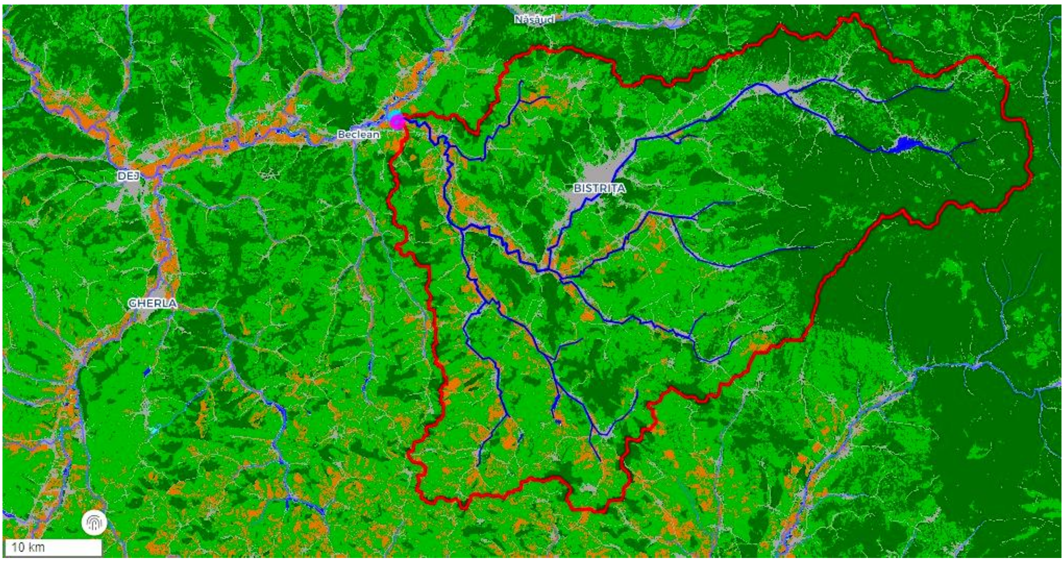


Figure 5. Analysis of the territorial structure of UAT Bistrița Ardeleană-Șieu (https://mghydro.com/)

The analysis of the map of the Bistrița Ardeleană-Șieu UAT shows a territorial structure dominated by rural human settlements and mixed areas with agricultural and forestry functions. In this context, Bistrița emerges as the only urban nucleus, concentrating administrative functions and regional polarisation. This distribution reflects a spatial organisation in which the rural and productive areas are predominant, while the urban areas play a central role in the territorial network (Figure 5).

The analysis of the maps shows the connection between the territorial units and the big urban centres: Cluj-Napoca, Gherla, Dej, through Beclean and Reghin, through the national road 15 A (DN 15 A)

The relationship between the demographic evolution of the localities and their level of development is a simple one, in which the developed municipalities in peri-urban areas register significant increases in the number of inhabitants as a result of their transformation into residential centres attracting important internal migration flows, especially of urban-rural form (Mihalache et al., 2014).

A second favourable situation for the increase in the number of rural settlements is represented by the regional demographic context, in other words, the demographic development of the area. In this way, the greater the likelihood of population growth in a municipality, the greater the demographic growth in the area as a whole (Mihalache et al., 2014).

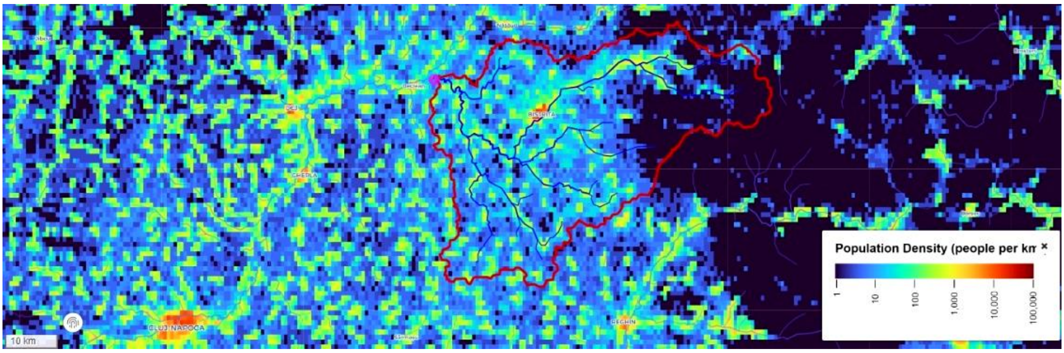
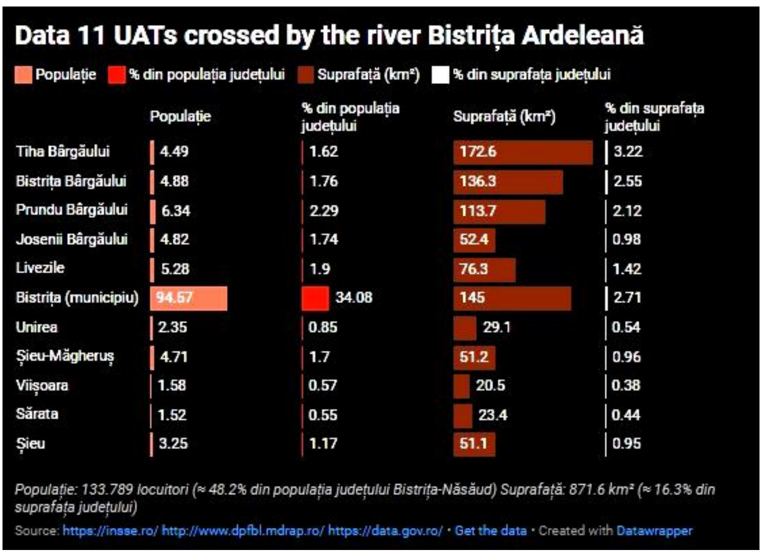


Figure 6. Population density at the UAT level (https://mghydro.com/)

Figure 6 shows the population density at the UAT level. It can be observed at the level of territorial formations that the density level is below the urban-rural relationship, where the urban density is higher. Bistrita is the most sparsely populated area in the UAT. Structural analysis conducted at the level of UAT Bistrița Ardeleană-Șieu (Figure 7, Figure 8).

From the analysis of the UAT Bistrița Ardeleană-Șieu (Table 1) and UAT Someșul Mare (Tătar, 2024), in figures represent 46.6 % of the county surface, 80 % of the county population.



Data 11 UATs crossed by the river Bistrița Ardeleană

Populație · % din populația județului · Suprafață (km²) · % din suprafața județului

	Populație	% din populația județului	Suprafață (km²)	% din suprafața județului
Tiha Bârgăului	4.49	1.62	172.6	3.22
Bistrița Bârgăului	4.88	1.76	136.3	2.55
Prundu Bârgăului	6.34	2.29	113.7	2.12
Josenii Bârgăului	4.82	1.74	52.4	0.98
Livezile	5.28	1.9	76.3	1.42
Bistrița (municipiu)	94.57	34.08	145	2.71
Unirea	2.35	0.85	29.1	0.54
Șieu-Măgheruș	4.71	1.7	51.2	0.96
Viișoara	1.58	0.57	20.5	0.38
Sărata	1.52	0.55	23.4	0.44
Șieu	3.25	1.17	51.1	0.95

Populație: 133.789 locuitori (≈ 48.2% din populația județului Bistrița-Năsăud) Suprafață: 871.6 km² (≈ 16.3% din suprafața județului)

Source: https://insse.ro/ http://www.dpfbl.mdrap.ro/ https://data.gov.ro/ • Get the data • Created with Datawrapper

Figure 7. Analyse the territorial units crossed by Bistrița Ardeleană

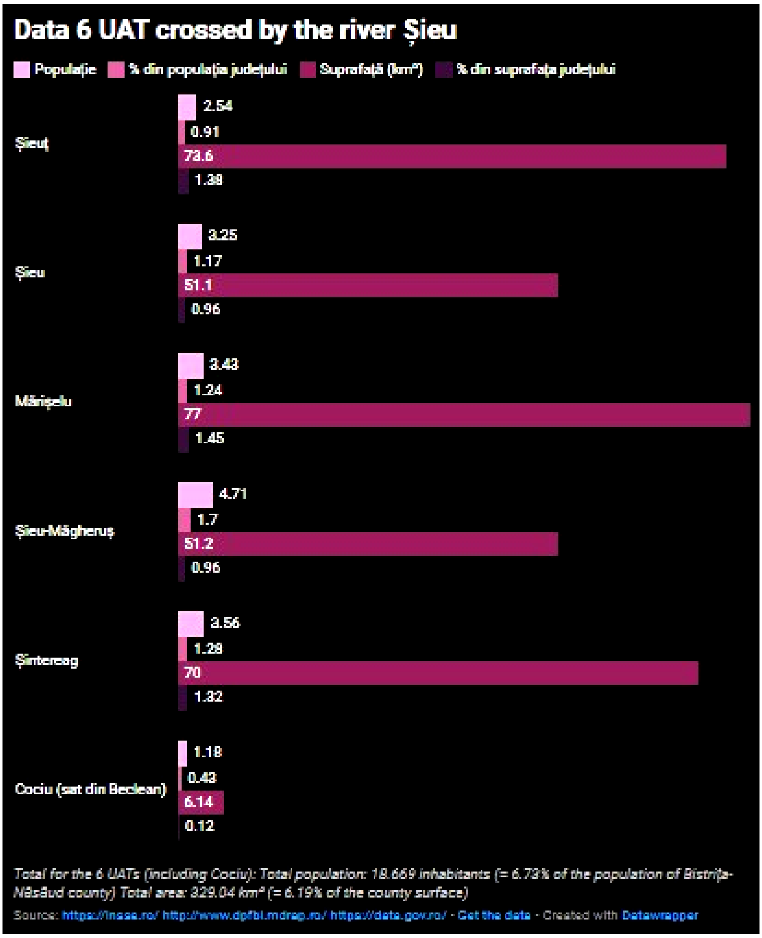


Figure 8. Analysis of the territorial units crossed by the Șieu River

Table 1. The characterisation of the new UAT

Name UAT	Area km²	% of county surface	Population	% of the county population
Bistrița Ardeleană-Șieu	1.200,64	22,49-50	152.458	55

In these two UATs are located the main centres of higher education (UBB, UTCN, UMF-TG), cultural, communications, energy, economic and tourism (Colibița Lake, Figa Baths). Among the two territorial unit formations are the main employers in the county: Leoni, Teraplast, Rombat, Frasinul, Terasteel, Iproeb, Raal, MIS Grup, Comelf, Roxana, Far Foundation and others.

CONCLUSIONS

The creation of an administrative-territorial unit, such as Bistrița Ardeleană-Șieu, can bring multiple social and economic advantages for Bistrița-Năsăud County:

Regional economic development: strengthening resources and infrastructure can stimulate investment and economic development in the region. Job creation: Infrastructure and development projects can generate new jobs, reducing local unemployment.

Access to European funds: A larger administrative-territorial unit can have easier access to European funds for development projects. Improved infrastructure: Strengthening resources can lead to the modernisation of transport, energy and communications infrastructure, facilitating access to markets and attracting investment.

Improved public services: A strengthened administration can deliver better and more efficient public services such as education, health and transportation. Social cohesion: Administrative consolidation can lead to better social cohesion and reduce disparities between communities.

UAT Bistrița Ardeleană-Șieu - UAT Someșul Mare represents a model of sustainable development for Bistrița-Năsăud County, serving as an example of administrative reform that, according to research, fosters economic welfare and a social future for its citizens.

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CONTESTED INNER-CITY GENTRIFICATION: EVIDENCE FROM THE BO-KAAP, CAPE TOWN

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Abstract: Research on gentrification is dominated by scholarship in the urban Global North but of increasing relevance to Southern cities. The novel contribution of this paper is to expand literature and debates around the contested nature of gentrification in the urban Global South through an examination of urban change and restructuring in the environment of South Africa. The neo-liberal policy context of post-apartheid South Africa provides the setting for the progressive advance of gentrification in Cape Town's historic inner-city neighbourhood of Bo-Kaap. The study draws upon primarily the findings from detailed semi-structured interviews which were conducted in 2023-2024 with a cross-section of stakeholders. It is revealed that the city of Cape Town authorities have adopted a growth at all costs mentality which provides the base for much of the area's development trajectory and restructuring. The demand for growth premises the vision and purpose of the local government and supersedes meanings of community. Gentrification processes are purposefully supported by the state in a fashion similar to those documented in cities of the Global North. Powerful property developers determine where and what gets built in inner-city Cape Town, including in the space of Bo-Kaap. It is argued current gentrification trends in the Bo-Kaap are reinforcing socio-economic polarization and confirming it as a defining feature of gentrification processes in the urban Global South.

Key words: gentrification, urban Global South, Cape Town, inner-city change, polarisation

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INTRODUCTION

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Urban transformation is a dynamic process, with gentrification one of its most prominent and contested features. Although processes of urban change and transformation usually are set within the context of cities in the Global North it is evident that they are of increasing relevance to the fast-expanding urban environments of the Global South (Lees, 2012; Horn and Visser, 2023). Arguably, until the early 2000s Visser (2019, p. 197) observes that "in the academic imaginary gentrification was conceptually bound to the Global North". It is acknowledged now by urban scholars that gentrification "has ceased to be a process that is specific and exclusive to certain command-centre cities and has become generalized, both spatially and sectorally, as an urban strategy that has replaced liberal urban policy" (Sánchez-Aguilera and González-Pérez, 2021, p. 243). In recent decades "there has been a rapid and visceral emergence of state-led gentrification in the Global South" such that gentrification processes have 'gone global' and are remaking the urban environments of many Asian, Latin American and African cities (Visser, 2019, p. 297).

Accordingly, the phenomenon of gentrification, initially observed in the urban Global North, has become increasingly visible and researched in cities of the Global South (Visser, 2002; Harris, 2008; Visser and Kotze, 2008; Lees, 2012; Visser, 2016). For example, Lees (2012) addresses cases of gentrification in Southern cities with reference to slum demolition in India, Pakistan and Chile. Similar forced displacement from state lands in China is investigated by Ghertner (2015) while Harris (2008) probes Mumbai's displacement of informal settlements. The advance of gentrification and its impacts for neighbourhood change and residents of Southern cities has not gone unchallenged. Nhlabathi and Maharaj (2021, p. 291) pinpoint that across the international experience civic mobilization against gentrification via the market induced use of urban space "has been very exuberant if not raucous at times". Indeed, heightened socio-economic divides have galvanized protest and resistance movements which have coalesced "around the perceived alienation of the market, where, for example, in urban settings, rising property prices displaced low-income people and businesses from prime locations of cities" (Nhlabathi and Maharaj, 2021, p. 291).

The aim in this paper is to expand the literature and debates surrounding gentrification in the urban Global South by interrogating one facet of the contested post-apartheid South African experience of urban change. Arguably, in South Africa, the country's legacies of apartheid's spatial and economic policies and current political context add complexity to gentrification processes, by often intensifying socio-economic divides and spatial exclusion (Garside, 1993; Visser, 2016; Massey, 2020; Lehloenya, 2022). Our specific focus falls upon the city of Cape Town and the impacts of gentrification on the historic neighbourhood of Bo-Kaap (literally 'Upper Cape'), geographically close to the inner-city. In its broadest context the gentrification of this inner-city space must be understood as part of the advance of wider urban renewal and revitalisation strategies. The development of leisure and tourism nodes, such as the iconic Victoria and Alfred Waterfront, positions post-apartheid Cape Town as an attractive 'world city' for transnational capital and the enjoyment of lifestyles by global elites (McDonald, 2012; Visser, 2016). Following South Africa's post-1994 reintegration in the global economy, Cape Town's neoliberal shift in urban governance prioritized private investment, public-private partnerships, and consumption-driven development (Donaldson et al., 2013; Scheba et al., 2021). Cape Town is observed as in competition with global finance capitals such as London and New

York causing property values to skyrocket, deepening inequality, and exacerbated displacement pressures particularly upon inner-city spaces (McDonald, 2012; Visser, 2016).

LITERATURE REVIEW

Research interest in urban gentrification has accelerated in recent years (Yee and Dennett, 2022; Knieriem, 2023, 2025; Lees and Rozena, 2025; Mezaroş et al., 2025; Mirzakhani et al., 2025; Nieuwland et al., 2025). Historically, the origin of the term 'gentrification' is attributed to the scholarship of the British sociologist, Ruth Glass in 1964 (Brown-Saracino, 2010; Finio, 2022; Lees and Rozena, 2025). A refugee from Nazi Germany, Glass adopted a Marxist approach to scholarship and is widely acknowledged as the founder of urban sociology in Europe (Andersen, 2021). The displacement of working-class residents in central London, by an upwardly mobile middle class, was viewed by Glass (1964) as a sudden invasion. She viewed gentrification as the inevitable consequence of London's political, demographic and economic environment at the time The concept and process of gentrification has since been scrutinized variously by planners, urban sociologists and geographers for several decades. It is contended that the meaning of gentrification has been altered since its first conception by Glass as the process of the rehabilitation of working-class neighbourhoods by middle-class buyers (Visser, 2019; Knieriem 2023). In modern debates the most recent discussions of the evolution of gentrification concentrate upon "polarized urban policies and pro-gentrification policies that facilitate urban renewal by government into international class systems" (Lehloenya, 2022, p. 14).

In the early 1970s the discourse around gentrification began to enter popular language in the USA (Finio, 2022). Scholarship addressing the rise of the 'back to the city movement' in New York during the 1970s and 1980s focused on (re)defining the concept. Finio (2022) identifies gentrification studies in the fields of sociology, economics, criminology, public health and planning, among other inter-disciplinary fields. These studies determine whether neighbourhoods that experience gentrification have different social outcomes to those neighbourhoods that do not gentrify. Marcuse (1985) is often cited for his understanding of displacement effects and the various ways in which this may occur. These include physical displacement by economic means, such as raising rents, tenant evictions (to close a rent gap), or unaffordable rising costs of municipal taxes. Indirect or 'exclusionary displacement' occurs when there is insufficient housing stock as it has been occupied by more recent migrating middle classes, or financially excluded due to unaffordable rising rents. Displacement pressure relates to space alienation, where former residents no longer feel safe or comfortable and feel severed from the space and social connections.

Notwithstanding these interventions Glass's (1964) description of gentrification as the displacement of poorer residents in a process of middle and upper-income groups buying and improving properties in poor neighbourhoods, remains relevant. Bourne (1993, p.97) re-iterates its relevance in a restrictive definition of gentrification as "the invasion of working-class neighbourhoods in the inner city by people of the middle class with a higher income, resulting in the replacement or displacement of many of the original occupants." Smith (2009) describes gentrification as a class conquest of the city. Likewise, Lees et al.

(2010) track the shift of working-class neighbourhoods into more affluent and commercial precincts. Here, it involves the renovation of dilapidated housing stock to meet the requirements of the new owners (Clark, 2005). For Sager (2011) gentrification is often seen as reclaiming the city for middle classes in a form of class-based colonisation and reinvestment in physical housing stock, and neoliberal urban regeneration. There is widespread consensus that gentrification is defined by an influx of new investment and new residents with higher incomes and educational attainment into a neighbourhood (Finio, 2022). Harding and Blokland (2014) suggest the term gentrification be restricted to those processes of urban change that involve displacement, to bring conceptual clarity and avoid the politicization of the term.

Research expanding on the positive outcomes of gentrification is sparse (Atkinson, 2003). Attempts to mask its negative effects, use alternative definitions which invoke positivity such as urban regeneration or urban revitalization. The negative evidence of gentrification appears overwhelming. Nevertheless, Brown-Saracino (2010) asserts that the positive consequences of gentrification processes cannot be ignored. The revitalization of economically depressed areas, increasing tax revenues, the rehabilitation of cultural and heritage offerings, improved services, employment creation and reducing negative social ills such as crime were identified. Whilst acknowledging its conflicting impacts Finio (2022) confirms that gentrification contributes to the tax base, promotes capital investment, advances city branding and attracts urban tourism. It draws higher income residents to city-centres, thereby making it an attractive proposition for urban planners and officials to improve the lives of its constituents (Brown-Saracino, 2017). Arguments presented by Freeman (2006) suggest expanded levels of diversity and opportunities for interaction across social and economic class groups are encouraged via the gentrification process. Increased property values, stabilization of declining areas, reduction of urban sprawl, promoting further development, greater access and variety of goods, amenities, and services are among other cited benefits (Brown-Saracino, 2017).

Situating gentrification within a political economy discourse of neighbourhood change the work of Smith (2010) highlights that economic shifts are coupled with a political turn towards competition within a global frame which is indicative of deregulation, privatisation and withdrawal of state welfare services. The emergence of the 'global city' or larger social transformations toward an international market culture exacerbate inequality by fostering "islands of renewal in seas of decay" (Zukin, 2010, p. 37). Lees et al. (2010) claim gentrification is a global urban strategy, intertwined with circuits of international capital, concerned with capitalist production rather than social reproduction. Atkinson and Bridge (2010) argue that expansionist neo-liberal policy, indicative of deregulation and privatisation of housing markets, accompanied with an entrepreneurial style of urban governance often exacerbate the social and economic divisions between the displaced and gentrifiers, resulting in a distinct type of 'neo-colonialism'.

Competing demand- and supply-side explanations of gentrification draw on political-economic perspectives which came about due to recognition of the failures of capitalism. Centred in Marxist economic theory, Smith (2002) outlines how rent gaps occur, that is the difference between capitalized ground rent and potential ground rent. The argument, however, that the specific means by which global capital seeks to overcome spatial (and regulatory) barriers to growth and 'capture' rent gaps needs political and analytical attention (Ghertner, 2015). Demand-side explanations view gentrification from the perspective of the gentrifiers, who they are and the broader structural elements that affect decision making. The rise of the service sector was a pivotal moment for the growth of professional employment in city centres, thereby increasing the value of nearby residential neighbourhoods as industrial areas were vacated. Gentrification processes often occur in combination with free-market forces (of supply and demand) and accelerated by government involvement through changes to zoning and land use, investment in infrastructure and encouraging urban regeneration and development via financial and tax incentives (Finio, 2022).

Atkinson and Bridge (2010) assert gentrification has resulted in the entrenchment of colonial patterns of segregation, as elites retreat into enclaves of gated communities or luxury residential developments. This larger managerial class enjoys the added advantage of globally transferable skills which can easily be deployed to new cultural contexts, translating the global to the local neighbourhood scale, thereby creating a global rent-gap. Gentrification is thus interpreted as a structural product of the land and housing markets. Capital flows where the rate of return is highest (Smith, 2010). Linkages occur between neoliberal urbanism and a new wave of corporatised gentrification which constitutes a 'restructuring' of the gentrification process, including deepening alliances with corporate developers, new-build gentrification and neighbourhood reconstruction. Lees (2003) styles this a process of 'super-gentrification' where processes are increasingly formally encouraged by the state, reflected in its national and local urban and economic development policies. The hallmark of new phases of gentrification is the "reach of global capital down to the neighbourhood scale" (Smith, 2002, p.441).

Harris (2008) asserts that the legitimacy and proliferation of standardised global gentrification processes must be questioned. The global expansion of gentrification is an extension of neoliberalism as it operates via institutional frameworks and local economic and social contexts. Sager (2011) emphasises that the link between gentrification and neoliberalism is established through the liberalisation of housing markets, the attraction of creatives, branding for the affluent and tourists, increasingly mobile work, urban regeneration and neighbourhood revitalisation. Weber (2002) outlines the process of neoliberalist financial policy which caused the global financial crises in 2008, following mass rental and mortgage payment defaults caused by the secondary mortgage market, created through quasi-public financial institutions. Understanding investments and land values is an essential part of unpacking gentrification as a capitalist process (Harding and Blokland, 2014). Atkinson and Bridge (2010) also aver that gentrification in the current context cannot be excluded from processes of globalisation.

Framing gentrification within the 'city as a growth machine' Logan and Molotch (2010) posit that place is a market commodity which creates wealth and power for political and capital elites, who wield a degree of power over the pattern of urban development. For these elites, the city is a growth machine which increases potential benefits for those in a position to capitalise on rents and consumptive activities (Harding and Blokland, 2014). Logan and Molotch (2010) contend the issue of growth is paramount for competing elites and is one of the few issues on which they agree. Based on this consensus any counter-vision of the purpose of local government or meanings of community is eliminated. The growth machine will sustain only certain persons as politicians if they participate in the growth consensus, superseding their motivations for the alleviation of poverty or inequality with varying degrees. Harding and Blokland (2014) further make the important distinction between 'use value' and 'exchange value' and how these different value systems interact at a personal and community level. Those who defend use values over exchange values tend to resist these interests by forming voluntary or community groups in broader social movements. Arguably, for better or worse, gentrification reconfigures a neighborhood's racial and social landscapes (Brown-Saracino, 2010). Gentrification as a development model is conflicted, however, and produces contradictory impacts, thereby making it a challenge to find political and planning consensus. Planners and officials therefore have a responsibility to address legitimate concerns of long-term residents who experience alienation, displacement and escalating housing and service costs (Brown-Saracino, 2017). Displacement is inseparable from gentrification and invariably linked to inequality and class struggle. Resistance to urban gentrification therefore is attracting a growing literature (Knieriem, 2025).

Among others Knieriem (2023) points out that gentrification is a changing phenomenon. One influential recent strand in gentrification scholarship concerns the role of tourism and more especially the importance of urban tourism in reshaping urban environments both in cities of the Global North and South (Cocola-Gant, 2018; Rogerson and Rogerson, 2021; Nieuwland et al., 2025). A body of international literature discloses that "in common with other consumer spaces (shopping centres, cultural and leisure complexes and entertainment landscapes) tourism too produces gentrification" (Sánchez-Aguilera and González-Pérez, 2021, p. 243). As pinpointed by Cocola-Gant (2018) the growth of urban tourism and 'touristification' modifies the residential and business landscape by changing it to cater for tourist consumption. Tourism development can reinforce gentrification processes in what, based on research in New Orleans USA, Gotham (2005) describes as 'tourism gentrification'. Overall, therefore, the concept of tourism gentrification "refers to the process by which tourism-related activities result in the displacement of long-term residents in favour of capital investment focused on tourism" (Mermet, 2025, p. 269). This process has been especially impactful on cityscapes in the context of booming urban tourism destinations, including for Cape Town in South Africa.

METHODS

The case study is of Bo-Kaap, a small centrally-situated suburb located on the slopes of Cape Town's Signal Hill (Figure 1). The suburb records a long and chequered history. Currently it is home to approximately 6000 residents and distinctive not only for its multi-coloured housing and cobbled streets but also for its association with Muslim Cape Malay heritage. From 1652 the Cape was under Dutch control with much of its settler population drawn from Europe. From 1658 onwards, however, the ancestors of the majority of the Muslim population arrived in the form of 63,000 slaves, high-ranking political exiles, convicts from East Africa, India, Arabia, Madagascar, and South-east Asia (Davids, 1980). The term 'Malay' came to designate 'roots in slavery but no ethnic significance' (Todeschini and Japha, 2024, p. 189). Nevertheless, in the settlement of Bo-Kaap which began from the earliest days there existed links with Islam. As pointed out by Lehloenya (2022, p. 87) Bo-Kaap was the site of the second and the lasting Muslim congregation and would become "the birthplace of Islamic culture in South Africa".

Figure 1. The Location of the Bo-Kaap, Cape Town
(Source: Wikipedia, 2024)

According to van Eeden (2022, p. 224) 'Malay' became "a self-descriptive term used by many Afrikaans-speaking Muslims with free-black or slave roots". Post-1948, during the apartheid period the identity of Cape Malays as a distinctive ethnic group was confirmed with the designation of the Bo-Kaap in 1957 as a Malay Group Area, a classification that allowed the neighbourhood to escape apartheid removals that impacted other such 'non-White' inner-city spaces in South Africa, most notably of Sophiatown in Johannesburg (Rogerson, 2025). This said, as pointed out by Davids (1980) the terms 'Cape Malay', 'Malay Muslims' and 'Malay Quarter' are derogatory and 'ahistorical'. The Bo-Kaap and the sounds of the adhan (call to prayer) broadcast from the neighbourhood's mosques embody the intangible heritage of the history of Islam as a suppressed minority faith in South Africa's colonial past and of the Muslim struggle for belonging in the city of Cape Town (Jethro and Lehloenya, 2023).

Table 1. List of Interviewed Stakeholders

Respondent	Description	Interview Date
A	Ex resident, Bo-Kaap tour guide	26 March 2024
B	Elderly resident of Chiapinni Street	2 March 2024
C	Resident activist and founder of the Bo-Kaap Tourism Association (BTA), resident site guide	24 Oct 2023
D	Resident activist, BTA founder	22 Oct 2023
E	Lawyer, Activist, resident, Member of Bo-Kaap Residents Association (BOCRA)	12 Feb 2024
F	Ward Councillor	20 Sept 2023
G	Tourism Planning Director City of Cape Town	18 Dec 2023
H	Tourism Planning Official, Western Cape Provincial Government	16 March 2023
I	Heritage Planner, City of Cape Town	31 Jan 2024
J	Heritage Planner, City of Cape Town	31 Jan 2024

K	Heritage Consultant/ Academic	22 Feb 2024
L	Heritage Academic/ Mosque board member/ Salt River Heritage Association Member	12 Feb 2024
M	Elderly resident/ Student Host Chiapinni Street	17 Feb 2024
N	Resident Tour operator/ Site Guide/ member of BOCRA and BTA	05 Feb 2023
O	Resident adjacent to informal settlement, home storyteller host, tour guide	24 Feb 2024
P	Resident, Founder of Bo-Kaap Rise; Business developer; Female Youth Movement member	24 Jan 2023
Q	Lawyer, Radio host, Curator of local Cape Muslim Slave & Heritage Museum	11 July 2023
R	Long term elderly resident, recently relocated to Northern Suburbs of Cape Town	22 Feb 2023
S	Bo-Kaap Museum Employee	08 Nov 2023
T	Long term resident of the informal settlement	21 Feb 2024
U	Resident of Chiapinni Street	22 March 2024
X	Resident of Dorp Street	07 June 2023

The findings of this investigation on neighbourhood change and gentrification in inner-city Cape Town are based on a background of an historical analysis which was supported by documentary and archival research, visits to key heritage sites, museum tours and in-depth interviews (see Jessa, 2025). A review of international urban and tourism development scholarship informed an understanding of neighbourhood change. Academic books and journals, policy documents, civic association and cultural resources were supported by 22 semi-structured interviews which were conducted during 2023-2024 with various role players. Table 1 provides details of the interviewees. The semi-structured interviews were based around broad questions, topics and themes and lasted between 45 minutes and three hours. Purposeful sampling allowed for the targeting of participants whose roles often overlapped. The interviewed stakeholders included long-term residents, tour guides, lawyers, museum employees, members of local civic organisations, heritage practitioners, and representatives of both the Cape Town city authority and Western Cape provincial government. Of note was the refusal of certain stakeholders, most notably the developers of large property projects (BLOK developers), to participate in the study because of the contentious nature of gentrification. The information derived from interviews was collated to determine points of coherence and agreement within community structures. Six months of participant observation included visits to historical sites and newly constructed property developments. Informal conversations with residents, business owners and tour guides provided further rich perspectives. Full details of methods and of the selection of interview respondents is given in Jessa (2025).

FINDINGS

The results are organised in terms of two sub-sections of material and discussion. The first provides an overview of the development of gentrification in the Bo-Kaap. The second turns to present the results from the stakeholder interviews and to highlight the divergent perspectives concerning recent developments around neighbourhood change in this distinctive inner-city suburb of Cape Town.

The Advance of Gentrification in Bo-Kaap, Cape Town

At the outset, the gentrification of the Bo-Kaap must be understood as part of similar processes of change and restructuring which occurred in other South African cities. Research investigating the impacts of gentrification by Visser (2002) provides a South African context for gentrification processes, policies and scholarship. The first signs of inner-city gentrification, argues Visser (2019), appeared in Cape Town during the late 1970s albeit were only recorded by academic scholars in the 1990s beginning with Garside's (1993) important study of Upper Woodstock. Massey (2020) suggests gentrification has gained significant traction in urban South Africa over the past two decades. This period is characterized by the adoption of neoliberal approaches in urban policy, facilitating the investment of private capital (and foreign public funds), privatisation, decentralization of the responsibility of local governments, and strengthening of private-public partnerships (Massey, 2020). Across all South Africa's major metropolitan centres – Cape Town, Durban and Johannesburg – evidence exists that inner-city spaces have experienced advancing processes of gentrification and displacement (Visser and Kotze, 2008; Donaldson et al., 2013; Kotze, 2013; Gregory, 2016; Ah Goo, 2018; Gregory, 2019; Visser, 2019, Nhlabathi & Maharaj, 2021).

In the specific setting of Cape Town, the beginnings of gentrification in suburbs close to the CBD were recognizable by the 1980s (Garside, 1993; Kotze and van der Merwe, 2000). For the late 1990s the discriminant analysis performed by Kotze and van der Merwe (2000) discerned few signs of actual gentrification taking place in Bo-Kaap. The following decade witnessed, however, the advance of a range of inner-city development initiatives in Cape Town aligned to foster and retain service-oriented transnational capital as well as catalyse socio-spatial restructuring (McDonald, 2012). Set against the backdrop of pro-growth policy frameworks these shifts "resulted in significant urban change" which attracted new capital and a new urban middle class (Donaldson et al., 2013, p. 173). By the early 2010s Kotze (2013) could write of Bo-Kaap as 'a community in trouble'. It was observed property prices were escalating and that "the area has seen a large number of housing units renovated and upgraded" (Kotze, 2013, p. 124). Donaldson et al. (2013) argued that one of the outcomes of a neoliberal approach to urban policy in Cape Town therefore was its ramifications for both the living environment and built heritage of Bo-Kaap. This historic space was described as "the last remaining inner-city neighbourhood that has not yet gentrified" albeit it "appears to be succumbing to this process" (Donaldson et al., 2013, p. 173). Many other communities within Cape Town suburbs that had earlier succumbed to the pressures of gentrification styled it as a new and insidious form of forced removal.

It was evident by the early 2010s that community leaders and established Muslim residents of Bo-Kaap were engaged "in a constant battle to preserve the neighbourhood's cultural identity" (Kotze, 2013, p. 124). Tourism emerged as a major additional threat at this time. Because the racially discriminatory practices of apartheid were extended to tourism, until democratic change in 1994 Cape Town's appeal as a destination for foreign visitors was limited (Rogerson and Rogerson, 2025). With post-apartheid change the meteoric rise of Cape Town as an iconic international tourism destination became a further trigger for tourism-driven processes of transformation. This posed a threat to neighbourhoods such as Bo-Kaap, which constitutes Cape Town's major hub for cultural tourism (Visser, 2016; Jessa and Rogerson, 2025a). Growing numbers of (mainly) international tourists are attracted to the area because of its cobbled streets and multi-coloured houses prompting mounting concerns about ‘overtourism’ (Jessa and Rogerson, 2025b).

The research findings of Jessa (2025) provide insight upon the tourism-induced impacts of neighbourhood change in the Bo-Kaap. It is evident that gentrification in the area is, to some extent, driven by tourism (Jessa & Rogerson, 2025a). This is apparent also in the response of the host community who have begun increasing the supply of accommodation, restaurants and cultural experiences. For many residents’ tourism presents several lucrative economic avenues, while for others, tourism is resented as it reinforces gentrification. Historical centres and cultural representation have become an integral part of the urban experience in what Koens and Milano (2024, p.276) suggest resembles ‘experiencescapes’ providing further impetus for offers of tourism services. The accelerating touristification of the Bo-Kaap invariably induces impacts on economic growth, social dynamics, and cultural heritage. As tourism has emerged as the dominant activity in the area the unfolding record of Bo-Kaap supports the contention that when tourism quickly becomes the predominant activity, and is embedded in the urban space, the neighbourhood becomes difficult for long-established residents to continue living there (Cocola-Gant et al., 2020).

The advance of extensive gentrification has triggered the wrath of the Bo-Kaap community. As pointed out by Nhlabathi and Maharaj (2021, p. 301) the local residents “have not necessarily viewed gentrification as the rejuvenation, revitalization or renewal of deteriorated urban neighbourhoods”; rather “they have viewed it as leading to the loss of generational heritage, community-family ties, and as spatial violence”. Arguably, some residents of the Bo-Kaap have deemed “gentrification of the place as the modern Group Areas Act”, a throwback to one of the most hated pieces of apartheid segregationist legislation (Maharaj, 2020). Residents consider that gentrification leads to alienation as parts of its historic neighbourhood are lost. Overall, “the area is being stripped of its original social fabric and the emotions are that the acts were heart-wrenching” (Nhlabathi and Maharaj, 2021, p. 301).

It is acknowledged that much of the new capital investment flowing into the Bo-Kaap derives from Europe. The new inhabitants of the gentrified Bo-Kaap bring with them a culture which is in conflict with the established cultural heritage of the neighbourhood. A classic example of cultural conflict occurred when Bo-Kaap’s Muslim community was served with a complaint against the soundscape produced by adhan (Jethro and Lehloenya, 2023). The call to prayer has been rendered by the mosques of Bo-Kaap since 1919 (Davids, 1980). It is an integral part of the area’s cultural heritage, a real environment of memory that has suffered in heritage contestation in Cape Town. Adhan expresses an ethnic past with the embodied remembering of its sensory experience. It was argued that adhan be considered as living heritage with religious significance. Nevertheless, it “is prone to attack because it lives outside ‘official’ heritage protection and receives little support outside the community it lives in”; as consequence this sound is designated as noise (Lehloenya, 2022, p. 14). Attention is drawn by Lehloenya (2022, p. 13) to the concept of ‘acoustic gentrification’ defined “as an extended form of the gentrification process exercised by those that give themselves ‘the right to the city’ through class citizenry, access and consumption to impinge on existing systems/practices". Seemingly, for new gentrifier residents the sound of adhan is viewed as a public nuisance and the march of gentrification must be associated with the sounds of silence.

Figure 2. 40 on Lion Street
(Source: Image Sirhan Jessa)

Figure 3. Artist impression of the completed Paradigm
Note: The scale of the development compared to the adjacent low level modest houses of Bo-Kaap (Source: Sirhan Jessa, 2025)

The pressures of gentrification experienced by the Bo-Kaap community were made visible through their defiance in support of protecting their own heritage. The approval of two large property developments in the Bo-Kaap were further causes for community resentment against the reshaping of the historic neighbourhood. The first was the construction by BLOK developers of a 65-unit upmarket residential development, “40onL” which was completed in 2019 (Figure 2). The second – and more controversial - was The Paradigm, a 19-storey luxury apartment development which will occupy an entire block (on 100 Buitengracht and Rose) in the heart of the historic space of Bo-Kaap (Figure 3). The approval of these developments was contested fiercely by the community with the final legal approval moving to a decision made by South Africa’s Supreme Court in Bloemfontein. The Paradigm is styled as ‘the monster building’ and like 40 on Lion is out of character with the historic low-rise buildings that dominate Bo-Kaap. Moreover, the costs of new build apartments within these mega-structures are way out of the budget reach for the vast majority of residents. Such large-scale property developments have resulted in considerable damage and disruption to the residential landscape of Bo-Kaap (Figure 4). Todeschini (2017) points out these high-rise developments dominate the skyline and sever the Bo-Kaap functionally and visually from the rest of Cape Town city.

Figure 4. Encroaching High-rise Construction, Chiapinni Street, Bo-Kaap (Source: Image, Sirhan Jessa, 2024)

Instead of upmarket expensive residential developments that threaten the heritage landscapes the Bo-Kaap community therefore pressed the case for addressing the urgent need for affordable and decent quality housing for residents. In 2018 the community reached a breaking point. For two weeks in May-June 2018, the community of the Bo-Kaap burned tyres and blocked the entry of tour buses and construction vehicles from the area. Community members picketed against bullying and 'forced removals', blaming big property developers, tourism, and city officials (Jessa, 2025). Residents argued that the city authorities of Cape Town had given property developers consent for the construction of these two complexes at their expense and in the face of their hostile opposition. Although negotiations occurred between city authorities and the community as a result of the anti-gentrification protests of 2018, progress was disrupted in 2020 by the COVID pandemic. The second sub-section turns to the results of the stakeholder interviews conducted post-COVID during 2023-2024.

Stakeholder Perspectives

The findings reveal that large-scale construction developments within the Bo-Kaap precinct and beyond are progressing steadily. Several insights into the approval process of recent large-scale developments were garnered. Residents' concerns remain apparent citing inflationary and displacement pressures along with a reticence of government to implement urgent mitigating measures such as municipal rates rebates, rent controls or maintenance subsidies. Free market forces exert political-economic influences outside of the control of planners. Reflecting on the development of 40onL, community representatives indicate the local community's lack of legal expertise and capacity limited the strength of its opposition to the development. Others suggest that blackmail occurred, along with undelivered promises of community subsidy and social housing.

Respondent D – "The Monster building development went to the Supreme Court in Bloemfontein. I saw the judgement and frankly, from a juristic point of view the appeal against the Monster Building was poorly structured so they lost the case which they could have won".

Respondent E - "I blame the leadership. These people (BLOK) were saying they going to invest in us, they're gonna give money to the soccer club"

Respondent N- "They (BLOK) promised some of the units would be low cost, for social housing for the community but that never materialised."

A resident and community activist lamented the destruction of the fine urban form and highlighted the insensitivity of large developments which sever the community from the City. Another respondent noted the dramatic increase of property costs in the neighbouring suburb of De Waterkant as a driver for increases of values in the Bo-Kaap. It was argued that such rising property prices tempts working class homeowners to capitalize on lucrative offers. Respondents, including some residents, pointed to estate agents, who fearmonger while providing reassurances that they have buyers lined up and willing to offer lucrative prices for properties.

Respondent C- "Estate agents create desperation … Just waiting for one of the D's. Death, desperation, debt or divorce."

Respondent D- "That's gentrification, you can see property prices in De Waterkant are significantly higher than Bo-Kaap and that's coming their way at high speed as the borders are getting gerrymandered. There's a lot of temptation in temptation alley."

Respondent C- "These high-rise developments create hard borders and blockages to access to a city which we always had the right to enjoy."

Another view indicates that favourable foreign currency exchanges (Euro vs cheap South African Rand) makes the Bo-Kaap have high appeal for circuits of global capital, as a lucrative option for second homes, rental properties and commercial short-term rentals. City officials abdicate imposing any sort of regulation, highlighting that the legal protection of private property rights supersedes any possible regulation.

Respondent I- “And the difficulty in dealing with things like gentrification. Which really in a place that we can't use the planning law to really make a huge difference. And I mean we've had many over the years, examples of gentrification that have gone wild… It's mostly people from Europe, certainly very monied people.”

Respondent I -“We can manage form, architecture. We can manage the built component, manage the public areas, we can manage the streets, the streets or in each of the landscape. But we cannot manage ownership. But those are things that no country, no city can those be managed or controlled, it's just not possible, and possibly it's not desirable.”

The compelling argument from a community development activist suggests that the current poor economic conditions, coupled with significant debt levels experienced make it difficult for residents to cope with rising inner-city rents, rates and property costs, leading ultimately to their exclusion from the housing market.

Respondent D- “People need housing and poverty eradication is the fundamental issue. So, if people sell their homes or flats, at least they are out of debt.”

Respondent P - “…and then apart from the Bo-Kaap issues, young people are fighting just fighting like general economic issues, nationwide issues such as unemployment, no electricity. And now you still need to worry about keeping the community together but actually all you can really think about is trying to protect your family, so their rent and rates are too expensive and all of these issues”.

Respondent A- “The City of Cape Town is forcing people out with high rates. Some don’t have pensions and that would be money to live off if they sold their properties”

For some respondents, gentrification in the Bo-Kaap is experienced as economic displacement. Without inclusive economic policies such as rate rebates and rental restrictions, the interviews suggest several residents find the area increasingly unaffordable.

Respondent C- I have been a potential renter looking for accommodation in Bo-Kaap for probably about 20 years, and I still am currently right now looking to rent. I have been a potential buyer for about 10 years. I've never found easy options like every single other person that needs to be retained in Bo-Kaap. There are no options.”

Several other displacement pressures emerged from the findings such as the fragmentation of social connections. The punitive nature of tourism, especially for those who wish to go about their ordinary lives and want little involvement, is experienced most severely by the elderly.

Respondent J- “It really came down to continuation of social practices and people feel because of the displacement, they didn't have the social connection or cohesion that they used to”

Respondent H- “Tourism can be punitive especially for the elderly who just want to go about living their lives. It seems like these properties will eventually be sold off to the highest bidder”.

Several respondents revealed that they have moved on from the Bo-Kaap with their parents' home being placed on sale to expedite shares of inheritance. While one respondent invokes their right to private property another was reluctant to move despite being liable to pay his siblings' share because of concerns about safety and access to services in other parts of Cape Town.

Respondent L- "My wife is from Bo-Kaap. A few years ago, they sold their house because none of them were going to live there. They had a beautiful house up on the hill, the five sisters… two passed on so we couldn't reconcile keeping the house at the time. Nobody wanted to live there so we put it up on the market and got the best possible price."

Respondent Q - "From the resident's perspective that have six or seven children that stand to inherit one house. So, if it's worth R3million or more the only option would be to sell, given its unlikely one of them would be able to raise a bond of that value on their own nor would they be able to pay out a sibling. So that's where the gentrification comes in because the only person that could afford it is a white person from Switzerland."

Respondent X- "My brothers want me out so they can have their share of the inheritance".

Another respondent justified the advance of gentrification by arguing it was a return to the area's original mixed racial constituency.

Respondent S- "In my discussion with the community who had a different view about gentrification and to some extent preservation is important but at one stage the area was very mixed and in a sense gentrification in a sense is returning to that."

The interviews disclose long-standing requests to city authorities to apply rebates on municipal rates and financial assistance in order to maintain heritage homes. Residents contend that the area contributes to the Cape Town tourism economy and preservation is partially the responsibility of government. All officials interviewed agreed that rates rebates should be applied but could not provide an action plan.

Respondent E- "But you see we don't have a legislative framework like a rates rebate or something despite the value we bring into the city."

Respondent I- "We're also very aware of issues around what tax does rates and taxes do. But again, that's outside our ambit as heritage, to be able to influence that over the years, we have tried to meet with the Treasury when I was in a different position and try and look at relief on historical and historical areas, but at that stage there was absolutely no appetite for it, and I can imagine there's no appetite still."

Respondent G- "People's rates and taxes should be subsidised, especially primary owners, even its their children who inherit and perhaps earn below a certain pay scale. The City should assist these community members to stay. Once the property changes hands then it is justified that the rates go up so it is a slower transitional period."

Respondent B- "Tourists are always leaning against the walls when they take pictures, with their shoes, so we have to regularly repaint."

Respondent D- "…provide a tax incentive. Give them 10 or 20 years off levies, You're on the tourist route, we wish for you to benefit from your property so that you can maintain it…"

Respondent C -"Of course, there's some responsibility on government to contribute to the upkeep of heritage homes in the Bo-Kaap in some way. A child can see it even the beggar can see the missing element here. Is the city supposed to care about this? It's an important part of the city, it's part of their asset. Isn't Cape Town Tourism supposed to care about this? Is it not part of what they sell? Then it's obvious."

CONCLUSION

In a recent analysis Knieriem (2025, p. 1) goes so far as to state that "if there is one word in geography that can be described as politically charged, it is gentrification". The novel contribution of this paper is in broadening extant scholarship and debates around gentrification in the urban Global South through an examination of the contestations surrounding urban change and restructuring in the environment of post-apartheid South Africa.

The neo-liberal policy context provides the setting for the progressive advance of gentrification in Cape Town's historical inner-city neighbourhood of Bo-Kaap. The City of Cape Town authorities have adopted a growth at all costs mentality which provides the base for much of the area's development trajectory and restructuring. The findings illustrate the contention of Logan and Molotch (2010) that the demand for growth premises the vision and purpose of the local government and supersedes meanings of community. It is evident boosterism is employed by the authorities of the City of Cape Town as they revalue land prices, improve international competitiveness and employ marketing strategies which are geared to attract external investors. While these strategies support economic development, the costs to local communities are acknowledged only minimally. It becomes apparent then that gentrification processes are purposefully supported by the state in a fashion similar to those documented in cities of the Global North (Lees, 2003). Local government mandates for job creation and economic growth provide the contexts for both large-scale property developments and tourism expansion which have placed financial gains above all else. As Todeschini (2017) maintains powerful property developers determine where and what gets built in inner-city Cape Town, including in the space of Bo-Kaap. Through its current pro-growth urban planning the city authorities of Cape Town therefore exacerbate the uneven patterns of development inherited from apartheid planning (Scheba et al., 2021). Arguably, within the context of spatial justice the current trends of gentrification in the Bo-Kaap are reinforcing socio-economic polarization and confirming it as a defining feature of gentrification processes in the urban Global South.

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CLIMATE ADAPTATION IN URBAN TOURISM DESTINATIONS: INSIGHTS FROM BULAWAYO, ZIMBABWE

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Abstract : Climate change is one of the leading challenges confronting urban tourism destinations in the Global South. Nevertheless, this issue is relatively neglected in existing scholarship and most especially in sub-Saharan Africa. Climate change is an integral part of the 'riskscape' of contemporary urban Africa. The novel contribution of this article is to investigate climate change adaptation by urban tourism businesses in the setting of Bulawayo, Zimbabwe's second-largest city. The research uses a quantitative research design to investigate climate adaptation and mitigation of the tourism industry in Bulawayo. In total, 160 responses were obtained using a stratified random sampling technique to ensure representation from the different sub-sectors of the tourism industry. Key findings reveal leading initiatives as the adoption of energy-efficient technologies, the use of renewable energy, training employees in sustainable and green practices, the installation of water-saving systems, climate emergency response systems, collaboration with other stakeholders on climate action, and efforts to integrate climate risks in strategic planning. Overall, the study adds to the limited existing literature in the African context concerning urban tourism and climate adaptation strategies and their challenges.

Key words: urban tourism, climate change adaptation, Global South, African cities, Zimbabwe

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INTRODUCTION

Urban areas have become important and vibrant tourism spaces with diverse attractions and the ability to cater for people visiting for a range of different reasons (Morrison and Coca-Stefaniak, 2021; Morrison and Maxim, 2022). Visits to urban areas can be undertaken for purposes that include

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business, visiting friends and relatives (VFR), health, leisure and entertainment (Law, 1993, 1996). Urban tourism is now acknowledged as a major subsector of the tourism industry and a vital contribution to city economic development (Kálmán et al., 2024; Shereni and Ndhlovu, 2024). The past few decades have seen research on urban tourism grow in an exponential manner. The literature focuses on various issues that include pro-poor tourism, overtourism, sustainable tourism, tourism impacts in urban environments, slum tourism and residents' perception, among others (Aall and Koens, 2019; Rogerson and Rogerson, 2019; Page and Duignan, 2023; Gómez-Bruna et al., 2024; Koens and Milano, 2024; Maxim, 2024; Makoni and Mearns, 2025). Although most of the existing scholarship continues to be about urban tourism in the Global North, in recent years a considerable amount of research has emerged concerning important urban tourism destinations in the Global South, including in sub-Saharan Africa (Rogerson and Rogerson, 2021a; Horn and Visser, 2023; Makoni and Rogerson, 2023; Rogerson et al., 2024; Drummond, 2024; Makoni and Rogerson, 2024; Jessa and Rogerson, 2025a, 2025b; Rogerson, 2025; Rogerson and Rogerson, 2025a, 2025b).

Arguably, the issue of climate change is humanity's biggest challenge, with the imperative for the enactment of mitigation and adaptation strategies by multiple actors (Dodman et al., 2019; Birchall et al., 2023; S20, 2025). Scott and Gössling (2025) report that 2024 was recorded as the warmest year to date, exceeding the 1.5°C thresholds set out in the Paris agreement and further increasing global climate risks. During recent years, the matter of climate-responsive local economic development has gained traction as a strategic approach towards sustainable development (Nor, 2025). The concept of climate-responsive or climate-smart development "integrates climate adaptation and mitigation strategies with economic development initiatives, aiming to increase the resilience of local economies to climate change impacts" (Nor, 2025, p. 1). Not surprisingly, therefore, within the framing of sustainable tourism discussions, climate change issues have gained considerable attention in urban destinations (Pandy and Rogerson, 2019). This is because climate change and variability are becoming a common phenomenon in urban environments, including many tourism destinations across the world (Lin et al., 2021; Gössling and Scott, 2025). Furthermore, climate change impacts pose an existential threat to natural and human systems (Nguyen et al., 2025).

As documented by Carmody et al. (2024, p. 155), "many African cities are especially vulnerable to the uneven impacts of climate change through heatwaves, sea-level rise, coastal erosion, flooding and droughts". African urban settings are characterised by a diversity in climate hazards, urban vulnerability and governance structures, which necessitate adaptation strategies suited to the local context (Cobbinah and Finn, 2023). Climate change compounds several existing challenges that confront urban tourist destinations in sub-Saharan Africa. Among these challenges are weak governance, inequalities, poor service provision, unplanned urban growth and unemployment (Leonard et al., 2020; Musavengane et al., 2020). Many African cities are considered to face immediate and imminent risks from climate change, raising the urgency for mitigation and adaptation strategies (Pandy and Rogerson, 2019). Urban tourism is still, however, underrepresented in the burgeoning African scholarship around climate change (Fitchett, 2021; Saarinen et al., 2022).

This article, therefore, adds to the limited body of writings and debates in the African context concerning urban tourism and climate adaptation strategies. The novel contribution of the paper is to examine climate change adaptation and mitigation in the context of Zimbabwean urban tourism. Tourism scholarship in Zimbabwe is mostly rural-biased, a trend observed with regard to African tourism research as a whole (Rogerson and Rogerson, 2021b). The Zimbabwean urban landscape is a suitable setting to examine questions about climate adaptation and mitigation from a tourism lens.

LITERATURE REVIEW

As Broto (2017) stresses, urban areas as a whole and cities in particular can be critical strategic arenas for climate change action. For example, with visions for climate neutrality, European cities are considered as unique spaces for the implementation of smart initiatives for climate adaptation and mitigation (Kilkiş et al., 2024; Ulpiani et al., 2025a, 2025b). Climate change has evolved from being a phenomenon imagined in the future to a dynamic business and policy reality severely impacting the tourism industry (Gössling and Scott, 2025). The increased intensity and frequency of extreme weather events disrupt the functioning of the urban ecosystem and change the climatic suitability for tourism in cities (Fitchett, 2021; Pandey and Ghosh, 2023). The high concentration of energy-consuming activities in urban areas is considered one of the major contributing factors to GHG emissions (Salvia et al., 2023). This increases climate risks for urban tourism destinations not only in Africa but globally. In response, cities are necessarily developing adaptation and mitigation strategies that cushion the urban ecosystem from the impacts of climate change (Pandey and Ghosh, 2023).

Regardless of Africa contributing less to global carbon emissions, the continent faces the highest threats of climate change in large measure due to inadequate adaptive capacities (Saarinen et al., 2022; Carmody et al., 2024; Dube et al., 2024). Across sub-Saharan Africa, many cities have already started experiencing the impacts of climate change, with frequent flooding, heat waves and droughts increasing in intensity (Carmody et al., 2024). This raises the importance of integrating climate change issues in urban planning and creating sustainable cities and communities, as is emphasised by the United Nations Sustainable Development Goal (SDG)11 (Teller and Saarinen, 2024). It is important to note that urban areas are a major part of climate change discussions because of their significant contributions to greenhouse gas emissions and at the same time, because they are vulnerable to climate change (Aall and Koens, 2019). In support, Salvia et al. (2023) observe that urban areas are responsible for 70 percent of global greenhouse gas emissions, making them highly exposed to climate change impacts.

Arguably, despite growing awareness of the challenges concerning climate change across much of sub-Saharan Africa, there is limited capacity to undertake certain climate adaptation practices and as well to integrate climate adaptation with local economic strategies. This minimal capacity for implementation "is hindered by weak infrastructure, governance and financial constraints" (Nor, 2025, p. 1). For other observers, the limits and ineffectiveness of adaptation policies require a political economy base to climate change in order to understand the hegemony of neoliberal approaches toward climate risk management (Chakraborty et al., 2025).

Fitchett (2021) maintains that adaptation and mitigation measures depend largely on the already existing climate challenges, the context-specific climate hazards, as well as the demographics of the city's tourism sector. The study further notes that measures such as installation of sustainable urban drainage systems, low flow taps, installation of fans and air conditioning, green building designs and the use of dolloses in coastal cities have been adopted largely depending on the nature of the tourism hazards facing a particular city (Fitchett, 2021). In addition, Lin et al. (2021) point out the effectiveness of a balanced integration of technological as well as urban nature-based and social solutions to adequately adapt cities to climate change.

Phasing out fossil energy from transport, heating and cooling, among other energy uses, is critical in reducing carbon emissions in urban areas (Pan et al., 2023). Vehicle use in urban tourism is high and includes airport transfers as well as moving tourists from one attraction to another. This increases GHG emissions because most of the transport options available in the African context utilise fossil fuels like petrol and diesel. Balaban and de Oliveira (2022) propose smart mobility, which entails introducing innovative solutions in urban mobility aimed at reducing the carbon footprint in the way tourists move from one place to another in urban spaces. Although this is still limited in the African urban context, it remains a viable option to adapt and mitigate climate change. While innovations such as the adoption of electric vehicles and sustainable fuels have gained popularity, especially in the global north urban destinations, their uptake in the global south is still limited (Balaban and de Oliveira, 2022).

Tang et al. (2023) argue that promoting green consumption among tourists can effectively reduce the negative impacts of tourism. In line with this, pro-environmental behaviours such as walking and cycling can significantly reduce carbon emissions from motor vehicle use (Pan et al., 2023). Reducing vehicle use is one critical way of cutting carbon emissions, considering that transport is responsible for about half of tourism's contributions to climate change (Gössling et al., 2024). This can be achieved by encouraging the use of public transport over personal vehicles (Lin et al., 2021). In line with this, the growth of ride sharing in urban environments is also acknowledged for its role in cutting carbon footprint per person because of its ability to allow people to share one vehicle (Giddy, 2019; Perkumienė et al., 2021).

Green infrastructures are now widely considered critical in achieving carbon neutrality in cities (Barreira et al., 2023). This includes interventions like creating urban parks, community gardens and green roofs (Pandey and Ghosh, 2023). Complementing green infrastructure with green building designs, including green roofs, reduces heating and cooling demands in residential and industrial areas, which ultimately reduces energy use (Rogerson, 2014; Pan et al., 2023). Considering that the energy mix for most African countries is still dominated by energy produced from coal-powered plants, reducing energy use ultimately results in a reduction in GHG from energy production. Moreover, urban areas are mainly associated with the urban heat island, which increases the intensity of climate change-induced heatwaves. Investment in green infrastructure and green building designs provides the cooling effect, cushioning tourists from the resultant severe impacts of heatwaves (Fitchett, 2021).

The adoption of green and renewable energy is a common initiative adopted in the tourism industry, as it helps to cut carbon emissions (Dube and

Nhamo, 2021). Shereni (2022) confirms that clean energy sources like solar, LEP gas and hydroelectricity are valuable pathways for reducing carbon emissions in the tourism industry. Other climate adaptation measures that have been widely adopted in different contexts, albeit not limited to urban tourism destinations, include rainwater harvesting and water saving strategies, air conditioning, and diversification of tourism activities away from climate-dependent offerings (Saarinen et al., 2022).

Nieuwland & Nieuwland (2024) identified several external barriers faced by the tourism industry in transitioning to sustainability. These include the existence of weak regulatory frameworks, the unavailability of infrastructure, as well as the belief that others are not willing to cooperate with a perception that different actors are responsible for the transition to sustainability. Nieuwland & Nieuwland (2024) further isolated internal barriers as a lack of knowledge, a lack of time and resources as well. Fitchett (2021) argues that one of the major challenges in adapting to climate change is the attitude of tourism operators who are quite often reluctant to invest in infrastructural and managerial change because of the belief that climate change will be a challenge only in the distant future.

Financial restrictions present limitations for small, medium and micro tourism enterprises as they may fail to meet the capital requirements for climate adaptation and mitigation (Fitchett, 2021). Investment in solar and green building designs demands huge capital investments, which may not be readily available, especially in smaller tourism establishments (Shereni, 2022). Saarinen et al. (2022) mention that large-scale infrastructure adjustment is required to adapt to climate change effectively, however, this strategy remains difficult to adapt and implement in the African context due to huge capital requirements. Lin et al. (2021) identified several other challenges that limit adaptation capacities in urban areas, including competing priorities, limited space for green strategies and retrofitting, as well as uncertainties around timing and impact of climate change. Saarinen et al. (2022) further contend that the major challenge facing African tourism in adapting to climate change is the failure to prepare for and invest in a climate future and lack of knowledge on climate scenarios by the non-scientific community.

METHODOLOGY

The research was undertaken in the city of Bulawayo, which is in the national urban settlement system of Zimbabwe. After Harare, the national capital, Bulawayo is Zimbabwe's second largest city. Historically, in the colonial period and early independence years, Bulawayo was a significant industrial centre of Zimbabwe. In recent years, however, the city has experienced economic decline, which has been exacerbated by recurrent droughts and water shortages (Maphosa, 2025). Indeed, Nyathi et al. (2025, p. 13) show that the impacts of climate change in the city and surrounds "are progressively apparent".

Geographically, Bulawayo is situated in a semi-arid region, and thus the challenge of climate change becomes a local imperative (Maphosa & Moyo, 2024). Indeed, Kurehwatira et al. (2025, p. 1) assert that "Zimbabwe's urban centres are confronted by poly-crises, including climate challenges". Nevertheless, Nyathi et al. (2025, p. 2) highlight that "existing literature lacks sufficient focus on direct actions toward climate risk and adaptation in Bulawayo". In terms of tourism, Bulawayo is the cultural hub of Zimbabwe. Indeed, Matura and Mapira (2018, p. 134) assert that Bulawayo "is the hub of history, culture and heritage" and "the best place to visit and appreciate" the heritage of Zimbabwe. Cultural tourism thus, is a well-developed niche as part of local urban tourism and alongside business tourism, both formal and informal. The city of Bulawayo is also important as a gateway to other tourism attractions in Zimbabwe, such as Matobo National Park, Hwange National Park and the iconic attraction of Victoria Falls.

The study adopted a quantitative research design to investigate climate adaptation and mitigation of the tourism industry in the urban environment of Bulawayo. A stratified random sampling technique was adopted to ensure representation from the different sub-sectors of the tourism industry. The population of the study was drawn from the list of registered tourism operators provided by the Zimbabwe Tourism Authority (ZTA). It comprised tourism businesses operating in Bulawayo that include guest houses, lodges, hunting operators, hotels, restaurants, travel agents, car rentals, tour operators, safari operators and visitor activities. These businesses constituted the sampling strata for the study because their vulnerability, exposure and response to climate change are variable. Random sampling was further done in each stratum to establish climate adaptation and mitigation practices by tourism businesses. The sample size reached up to 160 respondents spread across different subsectors of the tourism industry operating in the city of Bulawayo.

A semi-structured questionnaire was designed to collect data from the respondents. The questionnaire included information on the demographic profile of the respondents, the climate adaptation and mitigation initiatives pursued by the tourism businesses and the challenges faced in adapting and mitigating to climate change. The questionnaire was administered online using the Google Forms platform. Respondents were first contacted by telephone to ask for their consent to participate in the study, and the link to the questionnaire was shared with the respondents who accepted to participate. The questionnaire was administered to supervisors, departmental managers, general managers, travel consultants, camp managers and owners in tourism establishments. These were considered to be knowledgeable about climate action activities in their organisations because of their strategic positions.

Data analysis was done using the Statistical Package for the Social Sciences (SPSS version 29). Frequency distribution was computed for the demographic characteristics of the respondents. This was followed by the computation of the mean scores across the different sub-sectors of the tourism industry to establish their climate adaptation and mitigation practices, as well as the challenges they face. One-way Analysis of Variance (ANOVA) was carried out to determine if there were significant differences in the mean scores across the sampled sub-sectors of the tourism industry.

RESULTS

Table 1 presents the demographic characteristics of the respondents, highlighting that the majority were in the 31-40 years age group (49%), with more males (53%) than females (47%) and 48% of the respondents holding a bachelor's degree. The results reveal that most respondents were from guest houses (38%), followed by hunting operators (16%) and hotels (14%). More than 90% of the respondents revealed that they are involved in climate change activities within their organisations and also that their establishments are experiencing climate-related impacts. Overall, the results reflect that the respondents are knowledgeable about climate change issues facing their organisations because of their involvement in climate change and environmental initiatives, making them suitable participants for this study.

Table 1. Demographic Characteristics of the Respondents (n=160)

	Variable	**Frequency**	**Percentage**
Age of Respondents	18-30 Years	49	30.6
	31-40 Years	79	49.4
	41-50 Years	31	19.4
	51 Years and Above	1	0.6
Gender	Male	85	53.1
	Female	75	46.9
Highest Educational Qualification	Bachelor's Degree	77	48.1
	Diploma	49	30.6
	Postgraduate Qualification	19	11.9
	High School	15	9.4
Sector of the Tourism Industry	Guest house/Lodge	61	38.1
	Hunting Operator	26	16.3
	Hotel	22	13.8
	Restaurant	20	12.5
	Travel Agent	11	6.9
	Car Rental	8	5.0
	Tour Operator	5	3.1
	Safari Operator	4	2.5
	Visitor Activity	3	1.9
Involvement in climate change and environmental initiatives	Yes	146	91.2
	No	14	8.8
Experience of climate-related impacts	Yes	133	83.1
	No	27	16.9

The respondents were asked to identify climate change adaptation and mitigation strategies which had been adopted by their relevant organisations. The findings are presented in Table 2. These show that the respondents agree on the presence of several initiatives in their organisations based on the mean scores within the 3.41-4.20 range. Some of the leading initiatives identified include the adoption of energy-efficient technologies, the use of renewable energy, training employees in sustainable and green practices, the installation of water-saving systems, a climate emergency response system in place, collaborating with other stakeholders on climate action, as well as integrating climate risks in strategic planning.

The overall results indicate that climate emission reporting, investment in climate resilient infrastructure and environmental certification are not established initiatives in the Bulawayo tourism industry based on the mean scores that fall in the neither agree nor disagree range. One-way ANOVA was done to examine if there is a statistically significant difference in climate adaptation and mitigation initiatives across the sectors of the tourism industry at $p<0.05$. The strategies with a significant difference are as follows: "Our organisation encourages tourists to use soft modes to visit the destination" and "My organisation engages in carbon emission reporting". Post hoc procedure using Tukey's HSD on the item "Our organisation encourages tourists to use soft modes to visit the destination", Tukey's HSD post hoc follow up procedure revealed a statistically significant difference between restaurants and most of the sectors of the tourism industry [Hotels (p<0.05=0.001), guest houses, (p<0.05=0.001), tour operators (p<0.05=0.043) travel agents (p<0.05=0.001), hunting operators (p<0.05=0.001), car rentals (p<0.05=0.001) and safari operators (p<0.05=0.029). Respondents from restaurants disagree that they encourage tourists to use soft modes of transport, contrary to the other sectors of the tourism industry. Further, there is disclosed a statistical difference between travel agents and guest houses (p<0.05=0.043).

Table 2. Climate change adaptation and mitigation initiatives (n=160)

Initiatives	Total Sample	Guest houses/ Lodges	Hotels	Hunting operators	Restaurants	Travel Agents	Car Rentals	Tour Operators	Safari Operators	Visitor Activity	ANOVA	
	Mean SD	Mean SD	Mean SD	Mean SD	Mean SD	Mean SD	Mean SD	Mean SD	Mea n SD	Mean SD	F-Value	P-value
We have adopted energy-efficient technologies (e.g., solar, LED, etc).	3.93 0.55	3.95 0.59	3.64 0.72	3.81 0.491	4.1 0.31	4.09 0.302	4.13 0.35	4.20 0.84	4.00 0.00	4.00 0.00	1.65	0.115
We prioritise the use of renewable energy in our organisation.	3.84 0.59	3.89 0.66	3.68 0.78	3.81 0.491	3.9 0.31	3.91 0.30	3.63 0.74	4.00 0.71	3.75 0.50	4.00 0.00	0.50	0.856
Our employees are trained in sustainable or green practices.	3.83 0.60	3.79 0.66	3.86 0.71	3.73 0.533	4.00 0.46	3.82 0.41	3.75 0.46	3.80 1.01	4.00 0.00	4.00 0.00	0.42	0.911
We engage in environmental awareness or education campaigns.	3.79 0.62	3.74 0.73	3.55 0.67	3.85 0.543	4.00 0.32	3.82 0.40	3.63 0.52	4.00 0.71	4.25 0.50	4.00 0.00	1.28	0.256
We have installed water-saving systems or policies.	3.76 0.63	3.8 0.65	3.45 0.74	3.73 0.53	4.05 0.22	3.82 0.75	3.5 0.76	3.6 0.89	3.75 0.50	4.00 0.00	1.53	0.153
We have climate emergency response plans for extreme weather.	3.75 0.68	3.73 0.71	3.59 0.85	3.77 0.587	3.80 0.41	4.00 0.63	3.63 0.74	3.6 1.14	4.25 0.50	4.00 0.00	0.73	0.667
Our organisation has taken steps to adapt to climate risks.	3.73 0.65	3.69 0.73	3.50 0.74	3.81 0.567	3.95 0.22	3.91 0.70	3.38 0.74	3.8 0.45	3.75 0.50	4.00 0.00	1.21	0.300
We collaborate with the government or civil society on climate actions.	3.59 0.68	3.60 0.69	3.68 0.84	3.48 0.51	3.6 0.68	3.82 0.60	3.13 0.35	3.60 0.51	4.00 1.16	3.33 0.58	0.99	0.441
Our organisation includes climate risks in strategic planning.	3.58 0.70	3.56 0.79	3.64 0.66	3.65 0.629	3.53 0.77	3.55 0.52	3.25 0.71	4.00 0.71	3.50 0.58	4.00 0.00	0.65	0.739
We monitor climate-related changes affecting tourism.	3.48 0.75	3.44 0.85	3.64 0.66	3.68 0.476	3.00 0.86	3.55 0.52	3.25 0.71	4.00 0.71	3.50 0.58	4.00 0.00	2.06	0.043*
Our organisation encourages tourists to use soft modes to visit the destination.	3.41 0.75	3.31 0.72	3.59 0.67	3.73 0.533	2.55 0.69	4.00 0.45	3.50 0.76	3.60 0.55	3.75 0.50	3.67 0.58	6.82	0.000*
Our organisation invest in environmental certification.	3.38 0.77	3.49 0.77	3.36 0.79	3.31 0.736	3.35 0.88	3.20 0.63	3.13 0.64	3.20 1.30	3.50 0.58	3.67 0.58	0.46	0.884
We have invested in climate-resilient infrastructure.	3.35 0.76	3.43 0.76	3.50 0.67	3.36 0.7	3.40 0.75	3.27 1.00	3.00 0.51	2.80 0.84	2.50 0.58	3.67 0.58	1.49	0.165
My organisation engages in carbon emission reporting.	2.91 0.86	2.87 0.87	3.41 0.80	3.00 0.913	2.20 0.52	3.09 0.83	3.13 0.64	2.60 0.89	2.75 0.96	3.33 0.58	3.33	0.002*

Note: Responses based on a 5-point Likert scale range from 1 (Strongly Disagree) to 5 (Strongly Agree); *One-way ANOVA is significant at p<0.05 (Source: Author Survey)

The results of Tukey's HSD post hoc test on "My organisation engages in carbon emission reporting" demonstrate that statistically significant differences exist between the restaurant sector and other sectors of the tourism industry [Hotel (p<0.05=0.001), guest houses (p<0.05=0.045), travel agents (p<0.05=0.095), and hunting operators (p<0.05=0.035)]. While only hotels show a weak agree score in carbon emission reporting, the rest of the sub-sectors of the tourism industry were either in the neutral or disagree score, with restaurants gravitating further towards the score of strongly disagree.

Overall, the findings disclosed the existence of several challenges faced by the Bulawayo tourism industry in mitigating and adapting to climate change. These are indicated in Table 3. The respondents agree to the following as their major challenges, namely, low prioritisation of climate change issues by the tourism industry, lack of coordination among tourism operators, inadequate government support, lack of technical expertise to support climate action, as well as limited information on climate risks. It is evident that our respondents neither disagree nor agree that stakeholders lack awareness of climate mitigation benefits and policies on climate and tourism are not well integrated are challenges faced by the tourism industry. This may be interpreted to mean that the respondents did not have a strong opinion on these two as challenges. Surprisingly, lack of funding was not considered to be a major issue in climate action, as this is usually a challenge for most tourism enterprises operating in the resource-scarce environments of the Global South.

Table 3. Climate adaptation and mitigation challenges (n=160)

Challenges	**Total Sample**	**Guest houses/ Lodges**	**Hotels**	**Hunting operators**	**Restaurants**	**Travel Agents**	**Car Rentals**	**Tour Operators**	**Safari Operators**	**Visitor Activity**	**ANOVA**	
	Mean SD	**Mean SD**	**Mean SD**	**Mean SD**	**Mean SD**	**Mean SD**	**Mean SD**	**Mean SD**	**Mean SD**	**Mean SD**	**F-Value**	**P-value**
Tourism businesses do not prioritise climate action.	3.90 1.18	3.86 1.33	3.95 1.25	4.32 0.80	3.89 0.88	3.90 1.45	3.38 1.19	3.60 0.90	4.00 0.82	2.67 1.53	1.058	0.39
There is a lack of coordination among tourism operators in climate action.	3.75 1.16	3.77 1.34	3.68 1.29	3.96 0.94	3.89 0.96	3.20 1.14	3.38 0.74	3.80 0.84	3.75 1.50	4.00 1.73	0.523	0.838
Government support for urban tourism adaptation is inadequate.	3.73 1.13	3.84 1.11	3.73 1.24	3.80 1.26	3.84 0.83	3.70 1.06	3.13 0.84	4.20 0.84	2.50 1.29	3.00 1.73	1.281	0.258
There is insufficient technical expertise to address climate risks.	3.69 1.21	3.71 1.29	3.77 1.11	3.96 0.94	3.32 1.16	3.80 1.40	3.63 1.41	3.80 1.10	3.50 1.29	2.67 2.08	0.687	0.703
There is limited access to climate risk information.	3.69 1.16	3.78 1.13	3.68 1.13	3.96 1.17	3.61 1.15	3.40 1.27	3.13 1.13	3.20 1.30	4.25 0.96	2.67 1.53	1.067	0.390
Urban tourism infrastructure is not designed for climate resilience.	3.59 1.20	3.58 1.16	3.73 1.16	3.80 1.26	3.47 1.22	3.60 1.35	3.00 0.93	3.80 1.10	4.25 0.96	2.00 1.73	1.242	0.279
Climate adaptation is viewed as too costly by most tourism operators.	3.55 1.17	3.56 1.28	3.52 1.21	3.72 1.10	3.79 0.98	3.50 1.35	2.75 0.71	3.40 1.14	3.75 0.96	2.67 1.16	0.865	0.548
Climate adaptation strategies are too complex or difficult to implement.	3.53 1.14	3.53 1.20	3.18 1.22	4.00 0.87	3.61 1.03	3.20 1.40	3.25 1.28	3.75 0.96	3.75 0.96	3.00 1.00	1.079	0.381
Coordination between the public and private sectors is weak.	3.48 1.30	3.45 1.31	3.73 1.32	3.60 1.26	3.37 1.30	3.60 1.43	3.13 1.13	3.80 1.31	3.25 1.71	2.33 1.53	0.566	0.805
Lack of funding is a major barrier to implementing carbon reduction measures.	3.47 1.11	3.44 1.25	3.43 1.08	3.52 0.96	3.53 0.96	3.50 1.35	3.63 0.97	3.80 0.45	3.25 1.26	3.00 1.73	0.176	0.994
Stakeholders lack awareness of climate mitigation benefits.	3.31 1.27	3.28 1.40	3.27 1.28	3.64 1.04	3.21 1.18	3.50 1.43	2.75 1.04	3.80 1.10	3.25 0.96	2.33 1.53	0.767	0.632
Policies on climate and tourism are not well integrated.	3.22 1.18	3.26 1.13	2.82 1.14	3.48 1.26	3.26 1.24	3.40 1.27	2.75 1.04	3.80 0.84	2.50 0.58	3.00 2.08	1.021	0.423

Note: Responses based on a 5-point Likert scale range from 1 (Strongly Disagree) to 5 (Strongly Agree); *One-way ANOVA is significant at $p<0.05$; Source: Author Survey

One-way ANOVA tests on all items did not show any statistically significant difference in climate change mitigation and adaptation challenges across the different sectors of the tourism industry based on the F values and P values observed. This indicates that all the sub-sectors of the tourism industry face more or less similar challenges in adapting and mitigating the challenges of climate change.

DISCUSSION

The results of this study reveal a high interest in climate change issues by the sampled Bulawayo tourism businesses based on the number of respondents involved in climate action initiatives in their organisations. The research further evidences that respondents consider that their enterprises are already experiencing climate-related impacts. This confirms that in Zimbabwe, climate change is a phenomenon that urban tourist destinations are facing, and there is already action from the tourism businesses in terms of adaptation. Resultantly, there are several initiatives highlighted in this study that are being adopted in urban tourist destinations. For example, the adoption of energy-efficient technologies such as LED lighting, albeit driven by legal requirements, is a widespread climate mitigation measure (Shereni et al., 2022).

In addition, the use of renewable technologies in the sampled organisations was cited to be high. In the context of Zimbabwe, this can be linked to the country's erratic electricity supply, which has forced tourism businesses to look for alternative sources of energy (Mushawemhuka et al., 2024; Shereni, 2024). Most Bulawayo businesses (and even households) have shifted to the use of solar energy and LP gas in the kitchen as an alternative to grid electricity. This transition has not only resulted in a reliable energy supply for the tourism business but also helped to cut carbon emissions by reducing an over-reliance on electricity, much of which in Zimbabwe is produced from coal-powered plants (Dube and Nhamo, 2019). Also, the results reveal that there is high employee involvement in climate change through training on sustainability and green practices across all the subsectors of the tourism industry. Training is an important element for improving the green performance of tourism companies as it raises awareness of green practices and increases the environmental behaviour of employees (Vakira and Shereni, 2025). Similarly, engagement in environmental and educational campaigns targeted at tourists, employees and the general public is regarded as an effective way of reducing the carbon footprint of tourism businesses.

Other initiatives have shown variable applications such as environmental certification, investment in climate-resilient infrastructure, and carbon emission reporting. Previous research has demonstrated that environmental certification and carbon emission reporting only have low uptake in the tourism industry within the context of sub-Saharan Africa (Motsaathebe and Hambira, 2022; Spenceley, 2019). Investment in resilient infrastructure is consistently low among the different sub-sectors of the tourism industry, an observation which can be accounted for by the huge capital investment required (Saarinen et al., 2022). As shown in South African research, the making of resilient infrastructure requires retrofitting as well as changing building designs (Rogerson, 2014; Ismail and Rogerson, 2016).

Several challenges exist that limit the adoption of climate mitigation and adaptation measures by tourism businesses in Bulawayo. Regardless of the sampled establishments indicating that they are involved in climate action, the results show that there is a perception that tourism businesses do not prioritise climate action. Competing business interests may limit the prioritisation of climate change issues, resulting in only those practices that make a business case being pursued (Shereni et al., 2023). Further, this causes a lack of coordination among local tourism businesses as each operator pursues what serves their best interests. Indeed, without proper coordination between the public and private sectors, climate action becomes disjointed. Another major challenge that emerged from the study is the perception that climate adaptation strategies are too complex or difficult to implement. Arguably, this is linked to insufficient local technical expertise to address climate risks (Shereni et al., 2023). In turn, this reduces the capacity of urban tourism businesses to implement adaptation and mitigation strategies that are technical in nature. Another challenge is that urban tourism infrastructure in Zimbabwe is not designed for climate resilience. In the case of Bulawayo, this is compounded by the fact that many buildings in the city are historical and were constructed in the colonial period before climate change was recognised as an issue. Such buildings are protected under the municipality's by-laws, which limit the flexibility of tourism businesses to climate-proof their infrastructure. Lastly, climate adaptation is viewed as expensive by most tourism operators in an environment wherein funding at the national scale is considered a major barrier to the implementation of carbon reduction measures (Mzembe, 2021)

CONCLUSION

The challenges of climate change for urban tourism destinations represent an important and emerging international knowledge domain. Climate change is part of the 'riskscapes' of African cities (Carmody et al., 2024). Unquestionably, climate change adaptation must be an essential element for the sustainability of expanding urban tourism destinations of sub-Saharan Africa (Coghlan, 2024). Using the case of Bulawayo in Zimbabwe, this research has established the main climate adaptation and mitigation measures by tourism businesses within urban destinations, as well as pinpointing the multiple challenges they face in implementing these measures.

As climate change and tourism research are underrepresented within the urban context, this study is a modest contribution to closing this gap in Global South environments. Arguably, this research has several practical and management implications for urban planners, DMOs, policy makers, as well as tourism stakeholders in urban Zimbabwe. For DMOs and tourism stakeholders, it is important to ensure a coordinated approach in the fight against climate change and also to strengthen collaboration between the private and public sectors. Further, there is a need for policymakers to ensure access to information to reduce information asymmetry and the belief that climate action is complex and costly to implement. Finally, urban planners, particularly municipalities in cities like Bulawayo, need to devise appropriate guidelines for the building and maintenance of climate-resilient urban infrastructures.

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THE DYNAMICS OF VOTER TRANSFER BETWEEN ROUNDS OF THE 2025 PRESIDENTIAL ELECTION IN POLAND

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Abstract : In 2025, Poland held presidential elections. These were crucial for all parties. A victory of the government's candidate, Rafał Trzaskowski, would allow for the continuation of the government's proposed reforms, whereas a victory of the opposition's candidate (PiS) could block the implementation of the government's proposed reforms. The aim of this research is to analyze the electorate flow between the first and second round of the presidential election and to identify the impact of turnout on the final election result. Data for the analysis of voter transfer were obtained from the National Electoral Commission and public opinion polls. The research utilizes analysis of spatial variation in results, supported by analyses of changes in voting preferences based on polls. The analyses show that the mobilization of voters opposing Rafał Trzaskowski, as well as support from right-wing competitors who did not advance to the second round were key to Karol Nawrocki's victory.

Key words: behavior, election, electorate, presidential election, Poland, transfer, voters

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INTRODUCTION

Research in the field of electoral geography has always attracted considerable interest from politicians, local government activists, the media, and

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voters. Hence, the extensive literature on this topic in Poland presents analyses of electoral results from various perspectives: theoretical (Rykiel, 2011; Sobczyński, 2003;), geographical differentiation (Matykowski, 2007; Kowalski and Śleszyński, 2018), voting preferences (Zarycki 2000; Kowalski, 2000; 2003; Wendt, 2007), ideology, power, and democratization (Wendt, 2001; 2004; Kwiatkowska et al., 2016), and the decision-making process (Matykowski et al., 1995; Pysiak, 2006; Singh and Roy, 2014; Wielgosz, 2020; Boateng and Boateng, 2025). Similarly, many are dedicated to various elections, local government (Flis and Stolicki, 2015; Gendźwił, 2015; Kulas and Wendt, 2018; Bógdał-Brzezińska, 2020; Borkowski et al., 2022; Sieklucki, 2024), parliamentary (Krzemiński, 2009; Markowski, 2016; Skomski et al., 2017; Podemski, 2023) and presidential (Matykowski and Kulczyńska, 2010; Konarski, 2011; Mazurkiewicz, 2012; Falkowski and Cwalina, 2002; Wendt and Bógdał-Brzezińska, 2020; Domalewska, 2021; Wendt, 2021; Madej, 2023; Więckowska, 2023; Lisicki, 2024). Research covering various aspects of elections is of interest to political scientists, ethicists, lawyers, and political geographers, especially when election results may influence significant political, social, or economic changes, as is the case with the 2025 presidential election in Poland.

After two terms as President Andrzej Duda, representing Law and Justice (PiS), the 2024 parliamentary elections were won by PiS, but they failed to form a government due to their inability to form a coalition. After ten years in opposition, the Civic Platform (PO) and its coalition partners formed the government. Therefore, the 2025 presidential election promised to be exceptionally important for each of the two largest parties in Polish politics. Civic Platform, in coalition with the Polish People's Party, Poland 2050, and left-wing parties, needed a president who supported their program and whose vetoes would not hinder or even prevent the necessary changes, according to the ruling camp. Meanwhile, Law and Justice, which joined the opposition after losing power, saw only its victorious candidate as a defender of the changes implemented over the past ten years (e.g., in the judicial system). Another important issue was the reckoning with irregularities, erroneous decisions, violations of the law, and even abuses during the PiS government. With the right of veto, the Civic Platform (PO) president could facilitate these actions, while the PiS president could hinder or even prevent them. Therefore, the 2025 presidential campaign promised to be exceptionally fierce.

In internal primaries held by the Civic Platform (PO), Rafał Trzaskowski, Mayor of Warsaw, was chosen as the party's candidate, entrusting him with another run for president. The process of selecting the PiS candidate took longer, and from among the many potential candidates, PiS selected Karol Nawrocki, President of the Institute of National Remembrance, calling him a civic candidate. Szymon Hołownia, Speaker of the Sejm of the Republic of Poland, ran as the candidate for Poland 2050. Left-wing parties fielded three candidates: Adrian Zandberg (Together party), Magdalena Biejat, and Joanna Szenyszyn. Sławomir Mentzen, in turn, became the candidate of the Confederation of Freedom and Independence, while Grzegorz Braun represented the Confederation of the Polish Crown. Krzysztof Stanowski, a journalist who also runs a Twitter account, ran as a candidate on his own electoral committee. As the election results after the first round showed, the remaining four candidates, Marek Jakubiak, Artur Bartoszewicz, Maciej Maciak, and Marek Woch, received nationwide votes ranging from 151,000 to 18,000, or between 0.77% and 0.09%.

According to the electoral calendar, the first round of the election was held on May 18, 2025, with a turnout of 66.91%. Rafał Trzskowski won the highest number of votes, 6,147,797 (31.36%), while Karol Nawrocki finished second with 5,790,804 (29.54%). The battle for the presidency of Poland was decided between these two candidates in the second round, which took place on June 1, with Karol Nawrocki, supported by the Law and Justice party (PiS), winning. The winning candidate received 10,606,877 votes (50.89%), while his opponent, supported by the Civic Coalition (KO), received 10,237,286 votes (49.11%), for a turnout of 71.31%.

The purpose of this study, based on data presented by the National Electoral Commission (PKW, 2025), is to analyze the electorate's flow between the first and second rounds of the presidential election and to indicate, to the extent possible but limited by data availability and quality, the impact of turnout on the final election result. What decisions could voters have made? There are several scenarios of how voters decide. A person eligible to vote (presentation of voter behavior scenarios):

A) did not vote in both rounds.
B) did not vote in the first round but did so in the second.
C) voted in the first round but did not vote in the second.
D) voted in the first round for a candidate who did not advance to the second round and in the second round voted for a candidate who was close to that person's views.
E) voted in the first round for a candidate who advanced to the second round and voted for him in the second round as well.
F) voted in the first round for a candidate who advanced to the second round but in the second round voted for that candidate's opponent (Figure 1).

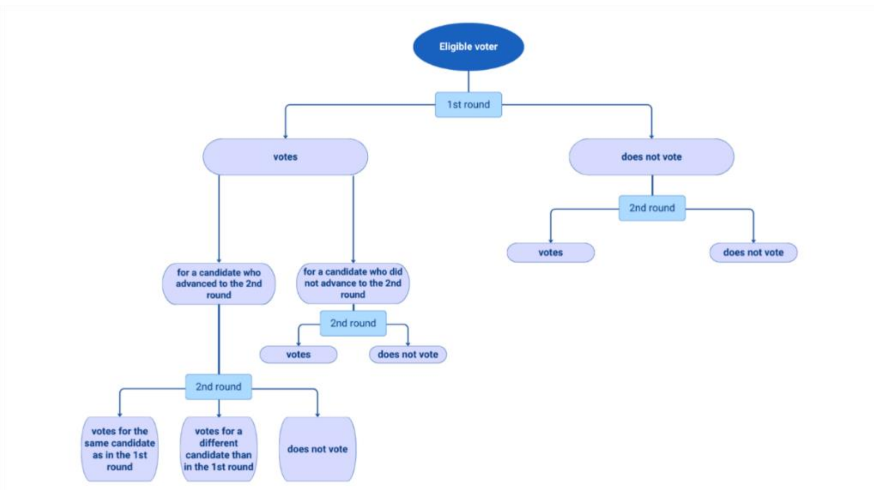

Figure 1. Diagram of scenarios for deciding by a person entitled to vote
Source : own study

Each scenario carries consequences and influences the final outcome. Therefore, each scenario was analyzed. A limitation of the research, which deserves attention in this case, is the obvious lack of precise data. Therefore, we cannot precisely determine how many people made a given decision, which leads to an estimation analysis, which has as much explanatory value as the indicated research limitations allow. Analysis of possible voter behavior:

A) In this case, the eligible voter only influenced voter turnout (lowering it).

B) In this case, the voter voting in the second round increases support for one of the candidates in the second round, but due to the lack of precise data, we cannot determine exactly how many people did so.

C) In this case, the voter had their candidate in the first round, but for some reason (possibly because none of the candidates who advanced were suitable for them) they did not vote in the second round. Because of this situation, this voter did not increase support for any candidate in the second round.

D) The situation we are primarily considering in this article – the voter either voted in line with our thesis, meaning for a candidate who holds similar views to the candidate from the first round, or refutes our thesis and votes for the second possible candidate.

E) In this case, the voter voted conventionally. This directly impacts the outcome of the candidate I vote for.

F) This is a hypothetical case that seems unpopular, and we assume such votes were insignificant, but such cases, though rare, may occur in practice.

DATA, METHODS AND LIMITATION OF RESEARCH

The aim of this research is to analyze the electorate flow between the first and second round of the presidential election and to identify the impact of turnout on the final election result. To achieve the aim of the work indicated above and in the introduction, data presented by the National Electoral Commission after the first and second round of elections (PKW, 2025) were used. The results of individual candidates were presented both on a national scale and spatially, divided into voivodeships and poviats, which allowed for the identification of differences in a geographical perspective (Wendt and Bógdał-Brzezińska, 2020; Wendt, 2021). The issue of unstable voivodeships was also interesting, as it was the case in Poland during the local elections (Kulas and Wendt, 2018) and subsequent parliamentary elections. The largest and smallest differences in the results of a given candidate between the election rounds were counted. Particular attention was paid to extremely large and extremely small differences. In the case of Rafał Trzaskowski, results higher than 20 percentage points and lower than 10 percentage points were taken into account. In the case of Karol Nawrocki, results above 30 and below 15 percentage points were taken into account. Various extreme differences were used because in the case of Karol Nawrocki, these differences were significantly higher due to the lower number of votes obtained by Rafał Trzaskowski in most regions during the first round, which constitutes another research limitation. An attempt was made to indicate the differentiation of electoral results depending on the urban-rural relationship and to indicate the impact of the level of urbanization on the final election result (Matykowski et al., 1995; Matykowski and Kulczyńska, 2010).

Obviously, and also contributing to the limitations of the research, only data provided by the National Electoral Commission (PKW) can be used in the analyses. However, this limited the possibilities of detailed analysis and interpretation of the results due to the fact that the PKW website only contains data on the percentage distribution of votes. With this in mind, it should be noted that due to the type of available data, it has been impossible to precisely determine the direction of vote transfer from candidates in the first round to candidates in the second round (Mazurkiewicz, 2012). To best reflect the process of transferring votes from candidates in the first round to those in the second round, data were needed with information on how each individual voter decided. In this case, data from CBOS polls (16.10.2025, CBOS Flash no. 24/2025) and studies (Cybulska, 2025a; 2025b) were used; from the report conducted by Ipsos for OKO.press, conducted on 27-28.05.2025, also from the Ipsos study (Danielewski & Pacewicz, (2025) and from the report of the National Research Group (OGB, 2025), conducted on 28-29.05.2025 for the Wirtualna Polska portal, together with a commentary (Ratajczak, 2025). The OGB survey was conducted using the CATI method on a representative sample of 1000 people, and the Ipsos survey for OKO.press was conducted using the mixed-mode method (CATI and CAWI) on 27-28.05.2025. The Ipsos survey was conducted on a nationwide A representative sample of adult Poles, N=1,000, was used. The number of interviews conducted by telephone and online was approximately 50% each. This should also be considered a research limitation, both due to the scope and method of the research. Given the limitations of data access and reliability, the ability to conduct analyses was limited, and an attempt was made to analyze the collected data and assess how voter transfers were shaping up.

RESULT AND DISCUSSION

Rafał Trzaskowski and Karol Nawrocki, the candidates who placed first and second in terms of vote count in the first round, advanced to the second round. However, their respective votes reached 31.36% and 29.54% of the 19,603,784 valid votes cast, a difference of only approximately 370,000 votes in the first round. During the campaign between the two rounds, Rafał Trzaskowski and Karol Nawrocki courted the votes of voters of the remaining candidates who advanced to the second round. The analysis assumed that in most cases, voters of the first-round candidates voted in the second round for one of the two candidates who expressed similar views to their initial candidate. This is to some extent demonstrated by the results after the first and second rounds, broken down by voivodeship (Figure 2) and poviat. As shown by the results in both election rounds for Karol Nawrocki (Figure 3) and Rafał Trzaskowski (Figure 4).

The analysis presented changes in support between the first and second rounds, as well as the potential vote flow from candidates who did not advance to the second round. The figures show that Rafał Trzaskowski recorded results below 20% in the second round in eight counties, including Janów, Łomżyce, and Brzozów. Karol Nawrocki, on the other hand, had support above 20% in each of the counties, although in Poznań, Sopot, and Gdańsk he received 27.27%, 27.48%, and 29.97%, respectively. This suggests that Karol Nawrocki's lowest ratings exceed 27%, while Rafał Trzaskowski achieved results below 30% in a total of 72 counties, representing 18.9% of all counties (Figure 5).

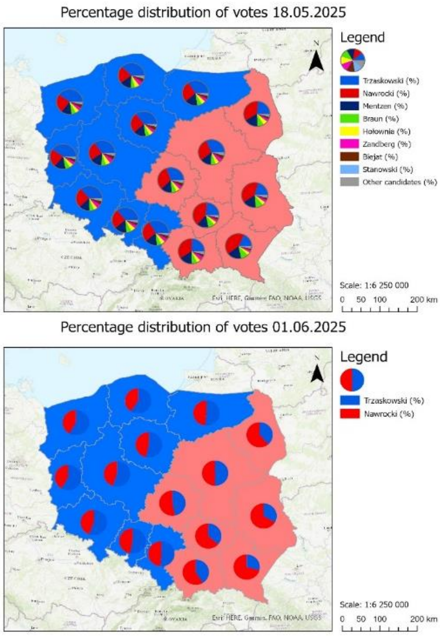

Figure 2. Percentage distribution of votes
Source: own study based on data from the National Electoral Commission (PKW

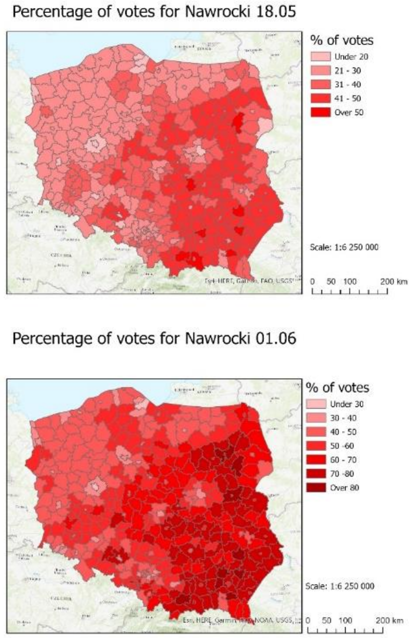

Figure 3. Percentage of votes for Nawrocki
Source: own study based on data from the National Electoral Commission (PKW)

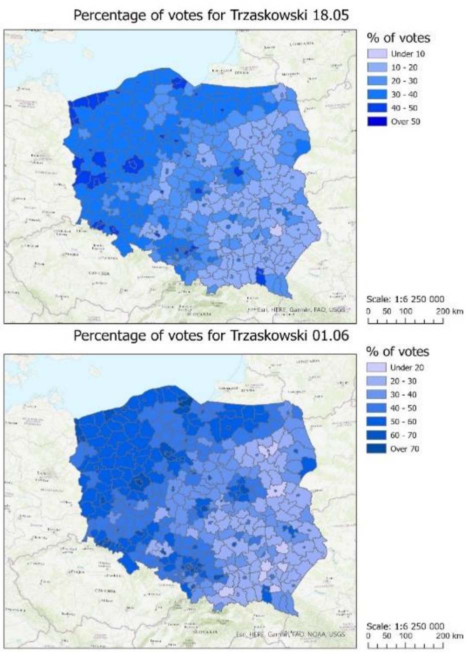

Figure 4. Percentage of votes for Trzaskowki
Source: own study based on data from the National Electoral Commission (PKW)

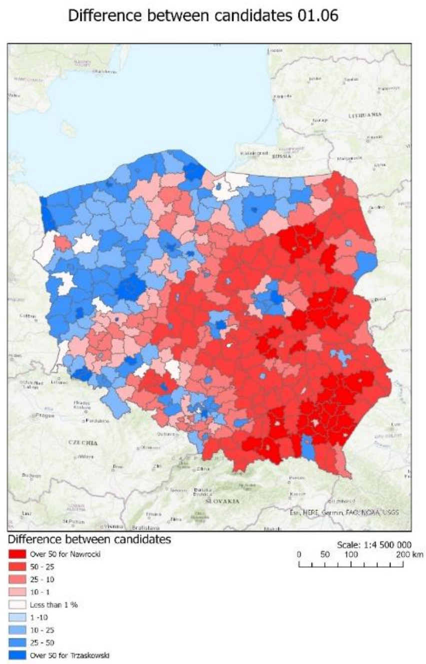

Figure 5. Difference between candidates
Source: own study based on data from the National Electoral Commission (PKW)

A comparative analysis of the results of Rafał Trzaskowski's first and second round election reveals electoral districts experiencing a shift in support, known as the swing effect. This concept refers to a sudden shift in electoral preferences in specific territorial units, observed over a short period of time, leading to a shift in the balance of political power across the country. A similar effect occurs in unstable voivodeships in Poland (Kulas and Wendt, 2018), as well as in the presidential elections in the United States. This phenomenon occurred, among others, in Bolesław County (in the first round, the difference was 5.07% in favor of Rafał Trzaskowski, while in the second round it was 1.8% in favor of Nawrocki), and Wołów County (from 0.19% for the Civic Coalition (KO) candidate to a 7.54% advantage in favor of the PiS candidate). This indicates the swing effect, but in these cases, it is difficult to clearly identify the causes without additional in-depth research. Possible explanations include the disintegration of local communities or local political marketing activities. Previous support for candidates from other parties also played a significant role in this context. In places where we observe a shift in the lead in favor of a candidate from a more right-wing party, relatively high results can also be observed for Sławomir Mentzen (Confederation) and Grzegorz Braun (Confederation of the Polish Crown). Their significant advantage over more left-wing candidates (Szymon Hołownia, Adrian Zandberg, Magdalena Biejat) and Krzysztof Stanowski, as well as the difference in votes they received in the first round, is also evident. Similar changes can also be noted in Rawicz County, where the difference in votes changed by 8.74%, while the difference in the results between the remaining right-wing parties (25.24%) and the left-wing parties (15.6%) was 9.64%, which is not significantly different from the actual difference. The same situation likely occurred in Gliwice County, where the 6.67% difference between rounds 1 and 2 can be compared to a 7.32% difference between the candidates in round 2. This allows for a conservative assumption, beyond the intuitive feeling or the assumption commonly presented by politicians and the media, that the majority of voters for right-wing candidates in the second round supported Karol Nawrocki, while left-wing voters supported Rafał Trzaskowski.

This may also indicate increased mobilization of the right-wing electorate, who cast their votes differently in the second round than in the first due to their candidates' elimination. This may be due to the desire for negative voting, meaning voting not for the candidate they support most, but for the one they dislike the least. This is the effect of voting against a candidate who is less likely to meet voters' preferences than for their preferred candidate who did not advance to the second round. The results of the vote distribution by voivodeship in the first and second rounds of the election show a clear division of votes between the selected candidates (Figure 2). This reflects the division of Poland into two distinct mental and political areas, which, according to some researchers, may be due to historical conditions (Kowalski, 2000; 2003; Kowalski & Śleszyński, 2018). The western, more liberal and pro-European, and the eastern, which is decidedly more conservative and traditional. This clearly demonstrates the long-standing division in Poland, reminiscent of the borders of the former partitions. This may indicate how the process of cultural inheritance of electoral structures influences the contemporary preferences of the electorate.

As is well known, polls are not a perfect source of information, which was pointed out above as a significant limitation of research. They are not infallible and may be subject to various statistical errors, depending on the sample. Poll results vary depending on the sample and research methods used and therefore cannot be considered entirely reliable. However, it is possible to analyze several polls and pay attention to the estimated results, as they may indicate an emerging trend. The polls tend to show a shift in voters from supporters of more extreme parties towards candidates whose views more closely align with voters' preferences (Figure 6).

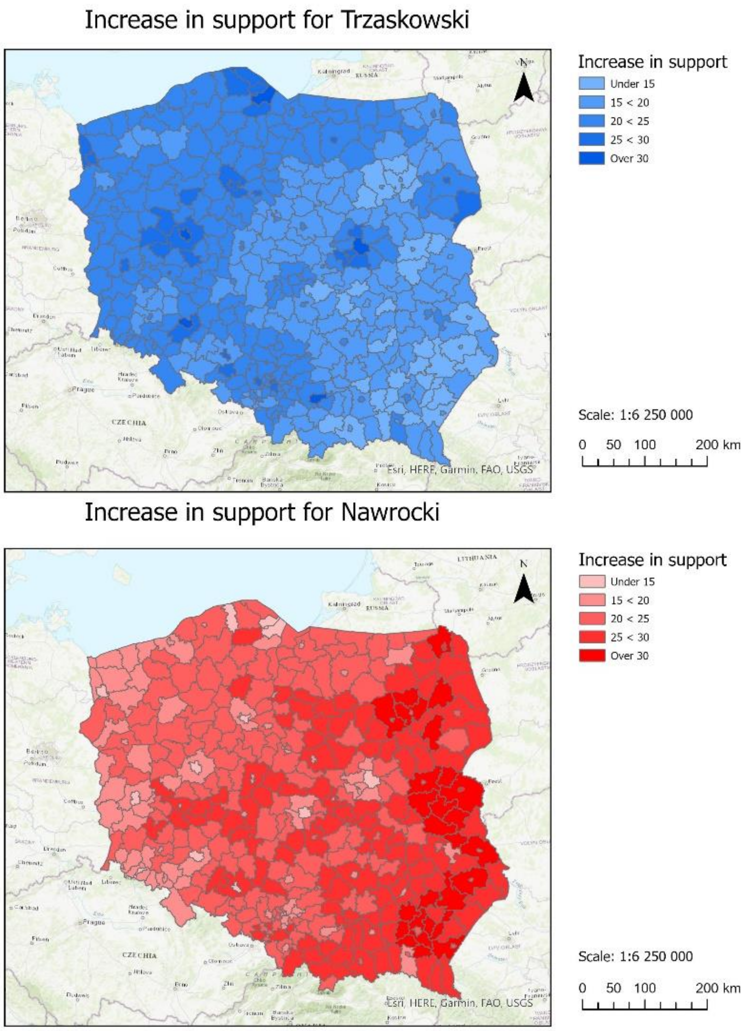

Figure 6. Increase in support for candidates compared to first round

Source: own study

According to a poll conducted by Ipsos for OKO.press, voters of the selected candidates in the first round will vote in the following percentage distribution (Ipsos):

• Rafał Trzaskowski voters - "100% of Rafał Trzaskowski's voters from the first round declare (definitely or probably) that they will participate in the run-off. Among those surveyed, 99% intend to vote for the Civic Coalition candidate again, and 1% are still considering it".
• Karol Nawrocki voters - "Among Karol Nawrocki's voters from the first round, 93% declare that they will participate in the run-off, of which 1% declare that they will vote for Trzaskowski, 98% for Nawrocki, and 1% are undecided".
• Sławomir Mentzen's Voters - "77% of Sławomir Mentzen's voters say they will vote on Sunday: 8% want to vote for Trzaskowski, 78% for Nawrocki, and 14% are undecided".
• Grzegorz Braun's Voters - "Only 45% of Grzegorz Braun's voters want to vote in the second round. Among them, 23% are Trzaskowski supporters (a surprisingly high number), 61% are Nawrocki supporters, and 16% are undecided".
• Szymon Hołownia's Voters - "Among Szymon Hołownia's voters, 70% say they will vote, with their support split as follows: 82% for Trzaskowski, 10% for Nawrocki, and 8% undecided".
• Adrian Zandberg voters - "In the second round, we can expect 80% of Adrian Zandberg voters, of whom 76% want to support Trzaskowski, 15% Nawrocki, and 9% don't know who yet".
• Magdalena Biejat voters - "In turn, as many as 99% of Magdalena Biejat voters declare they will participate in the second round, of whom 85% intend to support Trzaskowski, 10% Nawrocki, and 5% are undecided".
• Krzysztof Stanowski voters - no data available.
• Voters who did not vote in the first round - "Among those who did not participate in the first round, 48% intend to vote for Trzaskowski, 44% for Nawrocki, and 9% are still deciding".

According to a poll conducted by the National Research Group (OGB, 2025) for Wirtualna Polska, voters of the selected candidates in the first round will vote in the following percentage distribution:
• Rafał Trzaskowski's voters - "99.43% of Rafał Trzaskowski's voters declare they will support their candidate again in the second round, which demonstrates the very high loyalty of his electorate – only 0.57% of them are switching to Karol Nawrocki".
• Karol Nawrocki's voters - "Karol Nawrocki's electorate, in turn, appears to be completely unanimous – 100% of his voters from the first round intend to vote for him in the second round as well".
• Sławomir Mentzen Voters - "Among Sławomir Mentzen's supporters, the vast majority, 94.54%, support Nawrocki, while only 5.46% choose Trzaskowski, indicating strong support for Nawrocki among right-wing voters".
• Grzegorz Braun Voters - "Furthermore, 97.02% of Grzegorz Braun's electorate choose Nawrocki, while only 2.98% choose Trzaskowski".
• Szymon Hołownia Voters - "Szymon Hołownia's electorate votes for 92.75% of Trzaskowski, while 7.25% for Nawrocki.".
• Adrian Zandberg Voters - "Among Adrian Zandberg's supporters, 94.61% support Trzaskowski, while 5.39% support Nawrocki".
• Magdalena Biejat voters - "Magdalena Biejat voters support Trzaskowski by 97.08%, and Nawrocki by only 2.92%".
• Krzysztof Stanowski voters - "Krzysztof Stanowski's electorate flows show that 65.17% support Nawrocki, and 34.83% support Trzaskowski".

• Voters who did not vote in the first round - "Among those who did not participate in the first round, 44.57% declare support for Trzaskowski, and 55.43% for Nawrocki".

According to a survey by the National Research Group (OGB, 2025), "Nawrocki is gaining decisive support among right-wing voters, particularly those associated with the Confederation and its sympathizers, such as voters of Mentzen, Braun, and Jakubiak. Trzaskowski, in turn, is consolidating support among centrist and left-wing voters, including supporters of Hołownia, Biejat, Zandberg, and Senyszyn, reflecting the profound ideological differences between these electorates. The results indicate that the mobilization of specific voter groups, especially in the context of political polarization, will be crucial for the outcome of the second round" (OGB). Furthermore, according to the conclusions of a poll conducted by the Public Opinion Research Center (Cybulska, 2025a; 2025b), voters of the selected candidates in the first round will vote similarly to the results of the other two polls (Table 1).

Table 1. Possible electorate flows from the first round of voting based on polls (CBOS)
Source: Own study based on CBOS data

Electoral votes of candidates in the first round of the presidential election	Which candidate do you intend to vote for in the second round of the presidential elections? [%]			
	For Karol Nawrocki	For Rafał Trzaskowski	I don't know	I won't participate in the second round of the election
Rafał Trzaskowski	0	99	0	1
Karol Nawrocki	99	0	1	0
Sławomir Mentzen	58	12	10	20
Grzegorz Braun	86	2	5	7
Szymon Hołownia*	0	94	6	0
Adrian Zandberg*	6	82	9	3
Magdalena Biejat*	3	90	3	3
Pozostali kandydaci (łącznie)*	33	42	0	25
Niegłosujący w I turze wyborów prezydenckich	29	32	8	31
*The results of Szymon Hołownia, Adrian Zandberg, Magdalena Biejat and the remaining candidates together (i.e. Krzysztof Stanowski, Joanna Senyszyn, Marek Jakubiak, Artur Bartoszewicz, Maciej Maciak and Marek Woch) should be treated with caution due to the small number of respondents declaring they would vote for them in the first round of the elections.				

Based on the comparative analysis, it can be seen that Rafał Trzaskowski achieved the greatest percentage differences between rounds in cities (Table 2). Contrary to these results, Karol Nawrocki achieved the lowest percentage differences in cities and the highest in rural counties (Table 3).

Table 2. Percentage increase in support between the first and second round of elections for Trzaskowski in selected cities and counties
Source: own study based on data from https://wybory.gov.pl/prezydent2025/pl/wynik/pl

Counties	Trzaskowski I round (%)	Trzaskowski II round (%)	Difference
Poznań	44,16	72,73	28,57
Wrocław	39,67	67,09	27,42
Kraków	35,06	62,16	27,10
Gdańsk	43,33	70,03	26,70
Warszawa	42,27	68,21	25,94
poznański	43,64	67,49	23,85
Gdynia	46,67	69,94	23,27
hajnowski	33,31	55,83	22,52
gdański	39,42	61,83	22,41
Katowice	40,76	63,15	22,39
Sopot	50,30	72,52	22,22
Olsztyn	41,34	63,55	22,21
Pucki	36,03	58,18	22,15
Toruń	42,00	63,80	21,8
wrocławski	37,86	59,43	21,57
Chorzów	39,52	61,03	21,51
Siemianowice Śląskie	38,54	60,02	21,48
nowotomyski	35,04	56,18	21,14
Opole	46,81	67,89	21,08

Table 3. Percentage increase in support for Nawrocki between the first and second round of elections
Source: own study based on data from https://wybory.gov.pl/prezydent2025/pl/wynik/pl

Counties	Nawrocki I round (%)	Nawrocki II round (%)	Difference
łęczyński	39,54	73,48	33,94
siedlecki	46,97	80,84	33,87
strzyżowski	45,43	78,53	33,10
radzyński	43,08	76,12	33,04
łukowski	45,92	78,94	33,02
Bialski	39,88	72,74	32,86
chełmski	41,35	74,16	32,81
Łosicki	45,43	78,16	32,73
łańcucki	43,84	76,25	32,41
ostrołęcki	44,31	76,34	32,03
ropczycko-sędziszowski	49,21	81,16	31,95
lubartowski	41,25	72,84	31,59
rzeszowski	43,57	75,14	31,57

suwalski	37,47	69,04	31,57
parczewski	38,47	70,00	31,53
łomżyński	48,93	80,34	31,41
moniecki	43,07	74,16	31,09
przeworski	45,99	77,00	31,01
przemyski	45,14	76,13	30,99

In the case of vote flow between candidates who made it to the second round and those who were eliminated, the phenomenon of "proximity voting" can be observed, i.e., choosing the candidate whose views are closest to the voter's (Singh and Roy, 2014). Significant polarization between right-wing and left-wing electorates is visible (Wielgosz, 2020). In many cases, this is not the first candidate a voter would have preferred, as strategic voting is very important in the Polish two-round electoral system. According to P. Pysiak (2006), strategic voting is a form of rational behavior by voters who make decisions based not only on their own preferences but also on predictions about the behavior of other voters and the election outcome. The goal is to vote not for the voter's candidate, but for a candidate with a chance of victory. Furthermore, it aims to prevent the voter from electing a candidate they disapprove of. Negative voting has a similar effect. In the case of a two-round system, in the second round, not only electoral preferences are crucial, but above all, voting "for the lesser evil"—not for the candidate who aligns most closely with the voter's views, but for one who is not their opponent, so that the opponent of a given viewpoint cannot win. This phenomenon is called negative voting (Więckowska, 2023).

In this election, as in previous ones, voters for the presidential candidate differed by place of residence, and here we are dealing with a classic "urban-rural" divide (Krzemiński, 2009). The better results of more liberal parties in cities are explained by the concentration of elites, traditions of the post-noble intelligentsia, greater spontaneity, and a high degree of socioeconomic development (Kowalski, 2000). Similarly, Matykowski (2010) pointed to the importance of the urban-rural divide. This phenomenon is also noticeable in the 2025 elections we analyzed, in which Rafał Trzaskowski, the Civic Coalition (PO) presidential candidate, achieved better results in cities than Karol Nawrocki. The situation is similar for Karol Nawrocki, except that the latter has significantly better support in small towns. This indicates a visible division between Poland A and Poland B, confirmed by T. Zarycki (2000) and M. Kowalski (2003), among others. The latter argues, and is reflected in literature and the media, that the division between Poland A and Poland B indicates not only economic and social differences but primarily different patterns of political behavior. Poland A is the area of larger cities and more developed regions, where liberal-progressive attitudes predominate, while Poland B comprises peripheral, rural, and post-industrial areas with a predominance of conservative attitudes (Kowalski, 2003). This division is also visible in the presidential election results (Figure 2).

What could be the reasons for the observed increase in the number of votes cast for candidates in the second round?

There are many reasons for the increase in votes for both candidates. Primarily, due to the limitation of two candidates in the second round, voters wishing to participate in the elections are forced to choose one of them or have their vote invalidated. The increase in voter turnout is due to increased turnout. Negative mobilization played a key role in voter engagement. However, as the campaign period between the two rounds demonstrated, voters were motivated by numerous campaigns to vote "against" the other candidate, which also influenced the turnout.

In the first round, turnout was 67.31%, and in the second round, 71.63%, making the difference in the total number of votes cast a significant 4.32%. This is likely due to the significant mobilization of voters by candidates who did not advance to the second round. The Internet, as has been the case for many years (Bógdał-Brzezińska & Gawrycki, 2003; Bógdał-Brzezińska, 2012), played a significant role in engaging voters in the campaign for each candidate (Owczarek et al., 2025). Currently, presidential campaigns have relied heavily on presenting their demands and views on social media. Millions of people (a significant portion of Polish society) were able to view the election manifesto online. Debates hosted on popular national television stations, which enjoyed high viewership, also played a significant role in mobilizing voters.

What mechanisms could have influenced the direction of voter migration?

During the election campaign, each candidate presented their own platform. However, this campaign focused particularly on security, the state of healthcare, major infrastructure investments, foreign policy, migration, and the Ukrainian minority, which were also the subject of debates between the candidates.

Voter migration between rounds is therefore a result of many overlapping factors. A number of social, psychological, and political mechanisms influenced the decision-making of wavering voters. Concerns about potential armed conflict, the spread of the war in Ukraine, or other global threats (interestingly, the climate crisis was relatively insignificant compared to its importance) could have increased support for the candidate perceived by voters as capable of ensuring national security.

The issue of military and political aid for Ukraine was a polarizing factor. For some voters (especially conservative or nationalist voters), Poland's excessive involvement in this conflict could have been a reason to shift support to Karol Nawrocki. In turn, the more pro-European and pro-Solidarity electorate could have shifted its votes to Rafał Trzaskowski, who clearly supports Ukraine. Voter migration may therefore be a reaction to the candidates' stance on this issue, especially if the differences between them are clear.

A strong "anti-PiS" stance has been and continues to be one of the main mobilisers of the Polish electorate since 2023. Even if voters supported a different candidate in the first round, they could still vote for a candidate with a greater chance of defeating the PiS-backed candidate in the second round, simply to bring about a change of power in the presidential palace. This is a typical negative voting mechanism, which often generates large electoral shifts in the second round.

On the other hand, there is also an "anti-coalition" mechanism, meaning that some voters may fear a "solidification of power," leading to a president and prime minister from the same political party. For this reason, such a voter could vote for a PiS-supported candidate in the second round, even though they had chosen a centrist or independent candidate in the first round. This is also a form of strategic voting, but on the other side of the political spectrum.

The shift in support could also result from specific programmatic proposals that the voter deemed most important at a given moment. These could include proposals to work on: increasing the tax-free allowance; increasing social assistance; changing housing policy; increasing public sector wages or healthcare policy.

Because the remaining candidates in the second round differed in their views on the issues mentioned above, some voters could switch their votes to the candidate whose program better suited their needs, regardless of their previous ideological preferences.

Issues such as LGBT rights, the role of the Church, sexual education, and the attitude toward traditional values had strong mobilizing and demobilizing potential. Conservative voters can mobilize en masse against a candidate perceived as too progressive, while liberal voters can do the opposite.

Some voters were guided primarily by ideological identification, so in the second round they could vote for the candidate who presented views closest to their own. For example, a Confederation voter could vote for neither of the two finalists, but could also, depending on their ideological emphasis, support one of them.

The state of the economy and the candidates' economic proposals were among the main rational factors influencing voter migration (Madej, 2023). While price increases, inflation, unemployment, mortgages, and financial support programs (e.g., the 800+ program, the thirteenth pension) did not significantly differentiate the two candidates, these are topics that directly affect the everyday lives of Poles. Therefore, voters chose based on whether they were more concerned about the crisis or more eager for reform. In this election, disinformation and polarization in the media's public debate had a significant impact on voters (Domalewska, 2021). Media involvement was evident in many ways, with media outlets clearly siding with one candidate rather than presenting information impartially. Foreign intelligence agencies and funds also intervened in the disinformation campaign.

CONCLUSION

The official difference in the number of votes cast for the two candidates, as reported by the National Electoral Commission, was minimal: a mere 369,591 votes. Both candidates came close to winning the election. Ultimately, Karol Nawrocki won. The current President sits in the Palace thanks to millions of votes from people who didn't support him in the first round. His victory resulted primarily from the voters who believed there were better candidates in the first round. However, because their candidates didn't advance to the second round, they supported a candidate more congruent with their views. Karol Nawrocki didn't win because he was the best; he won to prevent Rafał Trzaskowski from winning. This mechanism also worked the other way around. In many cases, voters decided to participate in the second round solely to prevent Karol Nawrocki from winning. In the election, the majority of voters were voting for lesser evil, which fueled the campaigns of both camps and led to Nawrocki's ultimate victory. Nearly 370,000 votes were cast for lesser evil. More voters considered Karol Nawrocki a better candidate or the "lesser evil" than Rafał Trzaskowski.

The topic of electoral transfer between presidential election rounds is an extremely broad and complex topic, opening numerous research and analytical opportunities. Analyzing citizens' voting preferences between the first and second rounds of voting not only allows us to understand the mechanisms of voter decision-making but also provides valuable information on the effectiveness of election campaigns, the dynamics of candidate support, and the role of social, economic, and geographic factors in shaping election results.

Each of the aspects discussed in this analysis can be further explored and expanded. Detailed segmentation of the electorate is possible, for example, by age, gender, education, place of residence, or political involvement. This would enable more accurate identification of the social groups responsible for the transfer of support between candidates.

Spatial context is also an important and valuable complement to the analysis. Electoral data can be analyzed territorially. Analysis at the municipal level or even more detailed would be particularly interesting, as it allows for the identification of regional differences in voting behavior. Variations in support for individual candidates may stem from local socioeconomic conditions, political traditions, or the effectiveness of campaign campaigns in a given area. Further research would be particularly interesting to focus on local analysis, focusing on specific regions where significant shifts in support or unusual patterns of voting behavior have been observed. Such an approach would not only allow for a better understanding of local specifics but could also point to broader trends occurring across the country. This type of analysis could also provide a basis for modeling future electoral behavior and designing more effective electoral strategies.

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STAKEHOLDER INTERACTION AND COHESION: ADVANCING INCLUSIVE DEVELOPMENT IN THE TOURIST GUIDING SUBSECTOR

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Abstract : Tourist guiding plays a critical role and is often regarded as a mechanism for social and economic upliftment due to its relatively low barriers to entry. However, transformation within the subsector has progressed slowly, particularly for women and youth. This study explores the nature of stakeholder interaction and cohesion in advancing the ongoing development and inclusive transformation of the tourist guiding subsector. The research employed in-depth interviews with provincial registrars of tourist guiding and representatives from various guiding associations, resulting in a total of 14 interviews. The findings underscore the importance of recognising and respecting the distinct roles and responsibilities of stakeholders. The study found that a lack of clarity and coordination among stakeholders led to inefficiencies in fulfilling their mandates and aligning with the broader strategic vision for transformation. Overall, the study emphasises the critical role of collaboration, both within and beyond the subsector, in ensuring its continued development amid historical and contemporary challenges. The study contributes practical and theoretical insights to guide inclusive and transformative development within the tourist guiding subsector.

Key words: tourist guides, transformation, inclusive development, stakeholder collaboration, South Africa

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INTRODUCTION

Tourist guides have long been recognised as key frontline workers in the tourism sector, playing a crucial role in shaping memorable experiences that can be leveraged for sustained destination growth (Nyahunzvi and Njerekai, 2013; Kapa et al., 2022; Fu et al., 2023). Despite their diverse roles as interpreters, educators, cultural brokers, co-creators of experiences, and mediators between tourists, destinations, and tourism suppliers (Weiler and Black, 2015; Chen et al., 2018; Kapa et al., 2022), the value and importance of the tourist guiding subsector remain underacknowledged in tourism literature, industry practice, and government policy globally (Nyahunzvi and Njerekai, 2013; Hurombo et al., 2025). This renders a critical component of the tourism value chain vulnerable to the effects of crises, economic fluctuations, lack of formal recognition and regulation, and insufficient access to training and succession planning. The consequent domino effects can lead to diminished visitor experiences, weakened destination reputation, reduced economic benefits for local communities, and a decline in the overall tourism sector and destination itself (Fu et al., 2021; Chen et al., 2018; Kapa et al., 2022). Addressing these challenges is therefore central to advancing the inclusive development of the tourism sector, as empowering tourist guides contributes to greater equity, participation, and representation within the tourism workforce.

Certainly, inclusive development within the tourist guiding subsector remains a pressing concern, given the promises attached to the sector regarding job creation and the reduction of existing marginalisation within the tourism workforce (de Beer et al., 2014; SATSA, 2024; Shumba et al., 2024; Department of Tourism, 2023) as well as the greater need for transitioning away from the traditionally exclusive nature of the subsector (Trilaksono et al., 2025; Lekgau et al., 2025). Furthermore, in the South African context, the legacy of apartheid is still evident, particularly for individuals from previously disadvantaged groups (Lekgau et al., 2024; Abrahams, 2019), thus making transformation a major national policy imperative, with attention to tourism, as a labour-absorptive sector, being critical (Abrahams, 2019). Compounding these challenges, the tourist guiding subsector was one of the most adversely affected during the COVID-19 pandemic in South Africa, with many guides exiting the subsector in search of alternative opportunities for self-support (Mbatha et al., 2021). This has raised concerns regarding the longer-term implications of the crisis, which include shortages of qualified guides, particularly evident during the sector's reopening, thereby significantly exacerbating the vulnerability of the guiding subsector (Kapa et al., 2023; Bama and Nyikana, 2021). More recently, uncertainty surrounding the qualification framework has further constrained the sector’s stability. In 2022, it was announced that all existing qualifications accredited by the Culture, Arts, Tourism, Hospitality, and Sport Sector Education and Training Authority (CATHSSETA) would expire. This followed the implementation of the Occupational Qualifications Sub-Framework (OQSF) Policy in 2021, which mandated that, by 30 June 2023, all previous skills programmes be discontinued and replaced with new occupational qualifications (Schultz, 2023). These issues have a significant impact on the continued growth and development of the subsector, particularly in consideration of previously disadvantaged population groups and their involvement.

Thus, in the pursuit of transforming the tourist guiding subsector, it is crucial that all stakeholders within the tourism sector and value chain work cohesively to ensure effective short-, medium-, and long-term planning that aligns with the inclusive developmental goals of the sector at large (Trilaksono et al., 2025). It is against this backdrop that the current study was conceptualised, recognising the importance of the tourist guiding subsector and its potential to provide a defined career path for previously disadvantaged individuals, while also acknowledging the historical legacy and contemporary issues that affect it, some of which remain unresolved. This study draws attention to the systemic issues underlying cohesion between key stakeholders in the subsector, encompassing both private and public arenas, which affect the continued development of the subsector towards its goals of inclusivity and transformation. Certainly, fostering synergy between the various stakeholders is essential for the development of the subsector, as although public sector stakeholders lead the direction of development, the private sector can leverage resources that are often scarce in the public sector context (Chiwawa and Wissink, 2023). Hence, leveraging synergy between stakeholders is a critical step towards the strategic inclusive development of the subsector, stemming from the concept of stakeholder cohesiveness (Bama and Nyikana, 2021). Thus, this paper is grounded in an examination of the importance of stakeholder cohesiveness for inclusive development in the tourist guiding subsector.

LITERATURE REVIEW

Theoretical Underpinnings: Stakeholder Theory and Inclusivity

To understand the significance of stakeholder cohesiveness for inclusive development in the tourist guiding subsector, it is paramount to identify the relevant stakeholders. The application of stakeholder theory in this context is particularly pertinent, given its relevance to tourism (Martini and Buffa, 2015). This theory offers a valuable framework to comprehend the nature, interactions, and outcomes of various stakeholders within the tourism sector (Xiao and Xu, 2025; Nyanjom et al., 2018), which can influence its inclusive growth. The theory posits the importance of identifying stakeholders and their interests and influence, with issues of power, urgency, and legitimacy underpinning their interactions (Khazaei et al., 2015). Nyanjom et al. (2018) emphasise the importance of ensuring that marginalised stakeholders are continuously involved in planning and development efforts. Ultimately, employing this as a theoretical underpinning provides a lens through which the importance of stakeholder cohesiveness in the tourist guiding subsector can be understood, and how this can be leveraged to facilitate inclusive development (Nicolaides, 2015).

The second theoretical construct underpinning this research is inclusivity, or inclusive development, which has been proposed as both an aspirational idea and an analytical concept (Rogerson and Rogerson, 2020). Certainly, research highlighting the fundamental importance of inclusivity— the guiding principle of all Sustainable Development Goals (SDGs)— directly acknowledges the historical exclusion of marginalised communities within tourism (Schevyens and Biddulph, 2018; Lekgau et al., 2025; Nyanjom et al., 2018; Rogerson and Rogerson, 2020). Given South Africa’s exclusionary history, which has resulted in uneven and inequitable participation of stakeholders in the tourism sector, efforts within the broader tourism industry, particularly in the tourist guiding subsector, are now concentrated on promoting inclusivity and transformation

(Rogerson, 2025). The concept of inclusive development seeks to ensure equitable participation of relevant stakeholders, particularly those who have been previously marginalised (Sánchez-Soriano et al., 2024). Identifying relevant stakeholders for inclusivity in the subsector is not the sole important step that must be undertaken. The boundaries of inclusivity extend towards the meaningful involvement of the identified stakeholders, ensuring that all stakeholders collaborate synergistically towards a common goal. This underscores the significance of stakeholder cohesiveness for inclusive tourism development (Trilaksono et al., 2025; Bama and Nyikana, 2021). In the context of the current study, stakeholders identified originate from various backgrounds, encompassing the public and private sectors, as well as civil society. Aligning on shared goals, responsibilities, and roles presents a complex issue.

The tourist guiding subsector in South Africa

The environment within which tourist guides operate is volatile, characterised by various impacts and challenges. In the South African context, despite the importance of this profession within the tourism industry, tourist guides encounter additional challenges stemming from the country's tumultuous past (De Beer et al., 2014; Van der Merwe, 2016). Challenges related to barriers to entry in the industry - specifically those pertaining to race, gender, and differently abled individuals (i.e. previously disadvantaged groups) - along with regulatory requirements for the qualifications of tourist guides, represent significant obstacles that the tourist guiding subsector in South Africa must confront (Kapa et al., 2023).

Democratic South Africa's economic policy promotes economic inclusivity and social equality as principles for restoring socio-economic order, in light of the imbalances and structural inequalities that resulted from the apartheid regime (Rogerson, 2013; Mofokeng et al., 2018). The tourism sector has been identified by the government as a strategic area for achieving the country's broad socio-economic and transformation objectives (Department of Tourism, 2020). Tourism, with its extensive entrepreneurial and employment opportunities, ranks among the largest contributing sectors to South Africa's gross domestic product (GDP) (Abrahams, 2019; Adinolfi et al., 2018). Crucially, it has the potential to provide employment to vulnerable groups within society, including women, individuals with disabilities, those with inadequate literacy and skill levels, and those residing in rural communities (Harilal and Nyikana, 2019). Additionally, tourism serves as a significant foreign exchange earner, thereby stimulating the broader economy through its direct, indirect, and induced spinoffs (Nyawo, 2020; South African Tourism, 2020).

The tourism sector encompasses multifaceted stakeholders across five subsectors: travel agencies and tour operators; transport services; accommodation establishments; entertainment facilities; and other support and indirect services, often referred to as tourism supply chains (South African Tourism, 2020:7; Rahmiati et al., 2019; Butowski, 2021; González-Torres et al., 2021; Ferreira and Perks, 2020), with tourist guides forming an integral segment of this tourism supply chain (Nyawo, 2020). Consistent with De Beer's (2011) assertion that the profession of tourist guiding remains male-dominated, primarily composed of elderly Caucasians, Kapa et al. (2022a) note that the majority of tourist guides in South Africa are middle-aged men, thereby emphasising the necessity for transformation within the subsector, with a focus on inclusivity of previously disadvantaged individuals. Furthermore, those engaged in tourist guiding often transition from other careers and professions, having been drawn into the profession by, among other factors, a desire for travel and a passion for biodiversity, culture, and people (De Beer, 2011).

Tourist guides generally depend on, and primarily sustain themselves through, proceeds generated from their tourist guiding activities, executed either as independent/freelance operators or as direct contract employees of tour operating companies. This situation raises concerns regarding the financial viability of being a tourist guide, particularly in the context of widespread financial vulnerability, a legacy of the apartheid regime, affecting previously disadvantaged individuals. Studies further indicate that their remuneration is primarily determined by their skills and experience, as well as their capabilities, and secondarily by other factors such as personality traits and language skills (Mbatha et al., 2021; De Beer et al., 2014). Therefore, there is a clear need to strategically grow the subsector, concentrating on how new talent can be nurtured while ensuring that the subsector offers opportunities for viable career development. A crucial aspect of this, and a starting point, would be to engage all relevant stakeholders within the subsector to leverage the skills and resources available. It is from this perspective that the present paper was conceptualised, emphasising the importance of stakeholder cohesiveness for inclusive development in the tourist guiding subsector.

The role of tourist guides in South Africa

In South Africa, tourist guides are recognised as brand ambassadors of the tourism sector (Mbatha et al., 2021), tasked with delivering quality service to visitors in such a manner as to encourage return visits from tourists to the destination where they are based, as well as to elicit associated positive recommendations (Látková et al., 2018). Through their commentary on the relevant destinations and their interactions with visitors, tourist guides are perceived as playing a key role in the sector by enhancing visitors' knowledge about the destinations involved.

The Basic Conditions of Employment Act (BCEA) of 1996 [2002] mandates numerous requisite employment protocols to be established by South African employers across all subsectors. Notably, in the case of tourist guides, only those enrolled in the formal staff establishments of the tourism supply chain are afforded protection under the provisions of the Act. This situation indicates that many tourist guides are disadvantaged in accessing benefits such as leave, regulated working hours, competitive remuneration, and overtime benefits, which are prescribed by law, primarily due to their status as independent contractors/freelancers. Additionally, the report by Ramphele (2020) and other articles (see De Beer, 2011; Rogerson and Rogerson, 2014; Parliamentary Monitoring Group, 2020) document shortcomings in the current state of the tourist guide profession. Of significance is the inadequacy of documentation relating to the legislation governing tourist guiding activities, and the regulation of such by the relevant authorities; poorly recorded transformation milestones; a lack of professionalisation; and the limited amount of academic research available on the topic.

Accurate and up-to-date statistics concerning tourist guides in South Africa are not widely accessible; however, in 2017, the number of registered tourist guides was reported to be 10,000 (Kapa et al., 2022b), with more recent statistics suggesting that there were approximately 14,000 guides across the country in 2023. Although this increase has occurred in contrast to pre-COVID-19 figures, a significant proportion of existing guides are noted as being unregistered (Hes, 2023), with only about 60% of the total number of tourist guides being fully registered and active at the time of this report. Regarding their work status, many tourist guides are employed either full-time or part-time, while others are self-employed (with registered businesses or as sole proprietors). In most cases, the latter scenario applies, with the guides tending to operate independently as freelancers (Ramphele, 2020). This situation highlights one of the most significant challenges that the subsector must address, which ultimately pertains to the registration of guides.

Challenges in the tourist guiding subsector

Stakeholders within the South African tourist guiding subsector encounter numerous challenges, stemming from a historical context that has resulted in socio-economic difficulties, as well as from interactions between stakeholders from different spheres, or even within the same sphere, who may work at cross purposes. The noted lack of coordination constitutes a significant impediment that hampers the efficiency of the subsector, ultimately diminishing its capacity to achieve strategic goals effectively and efficiently. Furthermore, the resultant scarcity of tourist guides in the subsector due to the COVID-19 pandemic remains a considerable challenge faced by the subsector (Mbatha et al., 2021; Nyawo, 2020). This situation has implications for succession planning within the subsector, further underscoring the necessity of strategic stakeholder cohesiveness, not only to ensure continuity within the subsector but also to facilitate inclusive development.

METHODOLOGY

This paper employed a qualitative approach, utilising in-depth interviews with key stakeholders from the tourist guiding subsector in South Africa. These stakeholders, purposively selected, included various representatives from national government, provincial registrars, and representatives of tourist guiding associations from the private sector. The cross-section of selected stakeholders permitted the exploration of diverse perspectives regarding the importance of stakeholder cohesiveness, as well as the challenges encountered in achieving such cohesiveness. Ultimately, understanding these varied perspectives, particularly from both administrative and practical viewpoints, is essential for fostering inclusive development in the tourist guiding subsector. Within the South African context, the tourist guiding subsector is niche, comprising tourist guides, government authorities such as one national registrar, nine provincial registrars, and four associations specifically for tourist guides. As the study focuses on inclusive development and transformation within the subsector, stakeholders responsible for providing enabling conditions were approached to participate in this research, namely registrars and associations. As detailed in Table 1 below, a total of 14 in-depth interviews were conducted from January to February 2024, with interview questions centred on understanding their roles within the subsector, areas of collaboration, and challenges and opportunities in the growth and development of the subsector. Each participant was allocated a code to maintain anonymity. All interviews were audio-recorded, transcribed verbatim, and analysed using thematic content analysis. Atlas.ti, a qualitative data analysis software, was also employed to enhance the analysis of the data and identify relevant themes.

Table 1. Research participants and rationale for their inclusion

Participants	Participant codes	Rationale for inclusion
National Registrar	**P1**	The National Registrar collaborates with all Provincial Registrars to promote the advancement and transformation of the guiding subsector. Due to their role in overseeing the development of the subsector and monitoring trends, they were deemed crucial for providing insight into transformation in the subsector from a national perspective.
Provincial Registrars	**P2–P9**	The provincial registrars are responsible for the registration and renewal of tourist guides in their respective provinces and operate under the directives of the National Registrar's office. Given the varied contexts within these provinces and their closer contact with tourist guides, these provincial registrars were instrumental in providing contextual perspectives on transformation within the subsector.
Tourism Industry Experts	**P10–P11**	Tourism industry experts included individuals who were tourist guides and who work closely with tourist guiding associations and tourist guides themselves.
Tourist Guide Associations	**P12–14**	The various tourist guiding associations represent the different facets of the subsector, namely, types of guiding and professionalisation within the subsector. Generally, the associations advocate for the views of their representative members, assist in the training and development of tourist guides, and promote the professionalisation of the subsector. Their position within the subsector bridges the gap between tourist guides and governing authorities (registrars), enabling them to provide a holistic overview of contemporary issues in the subsector.

RESULTS

The importance of stakeholder cohesiveness was underscored by participants, being central to the growth and development of the tourist guiding subsector. Key themes related to this were identified in the data analysis and included the significance of all stakeholders in the subsector, the role of stakeholders and collaboration among stakeholders, and the facilitation of such collaboration.

Recognising the Importance of All Stakeholders in the Subsector

The tourism industry comprises numerous stakeholders, which extend into the tourist guiding subsector. Apart from the tourist guides themselves, various stakeholders from the public sector (government) and the private sector (associations) are essential to the operation, management, and achievement of the strategic vision of the subsector. It was widely acknowledged that all stakeholders are important, with this importance relating to their roles and responsibilities. However, an important observation that emerged was that some stakeholders were regarded as 'more important' than others – a perception that requires clarification. Each stakeholder within the subsector has specific roles and responsibilities, thus solidifying their importance. The diverse skills, competencies, and contexts that various stakeholders contribute highlight their significance and represent the diversity of the subsector. This diversity allows for dynamism to be embedded within the subsector, enabling stakeholders to learn from one another and leverage opportunities for the benefit of the subsector. However, this can only be realised when all stakeholders recognise each other's importance and are willing to engage. Participants acknowledged the significance of tourist guides as stakeholders, stating, *"the tourist guide has an important role to play, in terms of social interaction, safety and to provide information and tell stories that are unique and interesting." (P5)*

Moreover, the significance of all stakeholders from both the public and private sectors was emphasised, as evidenced by their interactions. One participant stated, *"I got invited in November to do a presentation online to all the registrars about what we do…so that we are all aware" (P11).*Creating awareness among all stakeholders facilitates optimal resource utilisation, fostering synergy within the subsector.

Recognising the importance of all stakeholders will dispel the notion of inequality between them and promote an understanding that each stakeholder group contributes uniquely to the operation of the subsector. A participant noted, "*the industries are willing to come to the party*" (P12), indicating the readiness of stakeholders to collaborate. This highlights the knowledge-sharing that results from recognising the importance of all stakeholders, as well as how varied perspectives can be advantageous in planning for and implementing strategies to ensure transformation within the subsector. While the tourism sector is driven by the National Department of Tourism, other stakeholders, particularly within the private sector, play a crucial role in executing the Government's strategic vision for the sector. Thus, recognising the importance of all stakeholders is an essential contextual component for the long-term strategic development of the subsector.

The Role of Stakeholders in the Subsector

The role of each stakeholder group is crucial to ensuring that the strategic vision of the subsector is achieved. It is through a clear understanding of these roles that stakeholders are empowered to act in their various capacities for the transformative development of the subsector. However, whilst this is theoretically understood by participants interviewed there is a lack of understanding regarding the roles (and responsibilities) of various stakeholders and positions within the organisational structure. Consequently, there are numerous inefficiencies in stakeholders performing their roles, with some placing an undue burden of over-reliance on others, causing a domino effect within the subsector. This concern is encapsulated by the following quote: *"I don't think the understanding of roles and responsibilities is there. You will find that registrars, provincial registrars, rely a lot on the department, and the department has a very different role to play in managing the affairs of tourist guides, but you will find an over-reliance on the national department, in terms of their understanding or execution of some of their roles and responsibilities"* (P1).

Another key issue that emerged was stakeholders themselves not fully comprehending their roles within the subsector and how these fit into the strategic vision for the sector's development. To accelerate this understanding, stakeholders must possess a comprehensive awareness of their contexts - whether that be the province in which they operate or the type of tourist guiding and guides with whom they work. Such awareness will inform the type of assistance required for potential and existing guides to advance the sustainable and strategic development of the subsector, ultimately contributing to the growth of the cohort of tourist guides in the country. This is particularly important, given the differing contexts of the various provinces, which necessitate a tailored approach to the support rendered. For instance, one participant highlighted:

"I don't think there is an understanding that in their (registrars') own provinces, tourist guiding can be one of those aspects where we can create jobs for the country. The exercise of someone being here, wanting to apply but not meeting the criteria, leading to their decline, is not productive. There needs to be a focus on how I can help this person. How can I assist this person to obtain this registration?" (P1).

Furthermore, tourist guides, as the primary actors within the subsector, play a crucial role in the larger tourism sector. Simply put, tourist guides act as hosts to tourists, ambassadors of the country, and bearers of historical and local knowledge and stories. The importance of this role should be fully appreciated, as it is central to the growth and development of the broader tourism sector itself. Such perspectives are exemplified by the following two quotes:

"I think if you look at what the guide does in any guest experience or visitor experience in this country, they are our ambassadors, full stop"

(P13), and "Feedback from tourists, especially international tourists, indicates that the tourist guide has an important role to play in terms of social interaction, safety, and providing information and narratives that are unique and interesting" (P5).

It was also noted that the various tourist guide associations play a vital role, particularly in the training and continuous development of tourist guides, demonstrating efficiency in their daily operations. Their effectiveness appears to stem from the clarity they possess regarding their role within the subsector and what is within their capacity to achieve, as shown by one participant stating: *"They (tourist guide associations) manage this efficiently. They play an active role and know their* responsibilities" (P1).

The efficiency of associations is underpinned by their organisational structures, as well as their networks of skilled individuals across the country. This enables them to mentor tourist guides within their organisation, ensure the transfer of essential skills and training, and engage in forward-thinking regarding succession planning within the subsector. One association representative underscored: *"We are very strong in terms of our structure. It is a choice to belong to the organisation, but the real value lies in the mentorship and support provided. We take guides from entry level to a professional level, thereby offering a definitive career* path" (P13).

The roles of government stakeholders, particularly provincial registrars, extend beyond merely maintaining a database of registered guides. For various government stakeholders, their primary roles are inherently linked to fulfilling legislative requirements. Thus, responsibilities encompass aspects of training, continuous development, marketing of guiding opportunities, succession planning within the subsector, and mentorship - all conducted with the goal of transformation, as exemplified in the two quotes below from provincial registrars:

"As a tourist guide registrar… [my role] is to promote and develop the tour guiding subsector in the province through training programmes, capacity building,

and access to market opportunities. I am also responsible for ensuring that the tourist guide complies with the act when providing guiding services and that tourists are kept safe wherever they go with them. Other support functions I provide include attending association or forum meetings as a representative of the government and playing a supportive role in addressing their requests for assistance" (P9).

"Registrars assist tourist guides in accessing funding, addressing compliance matters (such as tax and renewal of registrations), and providing training opportunities for tourist guides. Additionally, we advocate for the development and maintenance of attractions" (P4).

This, however, is a significant undertaking that necessitates the input and support of other stakeholders, such as associations, emphasising the importance of the roles of all stakeholders within the subsector. Leveraging the skills, competencies, and reach of associations can be extremely beneficial for the fulfilment of legislative requirements by the government.

It is evident that provincial registrars play a crucial role in organisation, management, and overall coordination within the subsector. The extensive range of responsibilities associated with registrars' roles indicates that there should be an equivalent level of empowerment corresponding to these responsibilities. However, a concern raised was the limited capacity of registrars to make decisions or act independently, relating to *the statement: "Registrars need to be given some discretionary power, because they ultimately become accountable for what has or has not been accomplished"* (P6). Another concern raised pertains to the extent of assistance expected from registrars by guides. This highlights the need for clarity regarding the roles of guides and their expected contributions to the subsector. Becoming a guide represents a viable career path, particularly with the assistance of government and the facilitation of associations. However, it requires hard work, continuous training, innovation, and dedication from the guides themselves:

"The government is here to facilitate and assist guides in becoming economically active by providing them with skills and networking opportunities. However, we cannot do more than facilitate guides to become economically active; it is ultimately an individual decision" (P9).

Thus, the roles and responsibilities of all stakeholders in the subsector ultimately contribute to supporting tourist guides themselves and, by extension, the tourism sector at large. It is important to note that the success of the tourist guiding subsector is a direct contributor to the success of the country's tourism sector. The growth and promotion of tourism is a significant strategy within the country and therefore requires substantial input and collaboration from all stakeholders.

***Collaboration among Stakeholders in the* Subsector**

Drawing on the foregoing results, it is evident that the functioning of the subsector is dependent on several diverse stakeholders. Thus, effective collaboration among stakeholders becomes a key success factor for achieving a transformed subsector. The manner in which collaboration occurs is important, as is with whom collaborative efforts are undertaken. For example, in addition to the stakeholders discussed above, collaboration with other government departments to further the objective of increasing awareness of the subsector among prospective guides would be essential. This would assist in promoting the uptake of guides in the future, thereby ensuring continuity within the profession. Collaboration with the Departments of Basic Education and Higher Education could be beneficial in embedding information about the subsector into curricula for learners, who can then begin to view tourist guiding as a viable career path. In this way, a broader view of the development of the subsector is adopted, focusing on potential guides rather than solely on the continuation of existing guides. In this regard, one participant expressed the following view:

"I believe that enhanced collaboration and a clear definition of the roles of education and training are essential. It is imperative that our educational and training programmes are designed to empower individuals to pursue careers in guiding or utilise it as a livelihood. Our focus should not be solely on those already within our organisation; rather, we should seek to foster greater collaboration with the Department of Basic Education and the Department of Higher Education. Our efforts should centre on creating opportunities for prospective guides at the educational stage when learners are making decisions about their future courses". (P1)

A significant issue identified by one participant is the current lack of collaboration among stakeholders, many of whom attempt to operate independently but face challenges due to decision-making and capacity constraints. One *participant remarked, "We are not initiating enough collaboration and partnership initiatives. We work in silos." (P8).* This has led to considerable inefficiencies within the system, with numerous stakeholders striving towards a common goal but doing so in isolation and *ineffectively.* This situation underscores the necessity for collaboration among various governmental and private sector actors, all of whom contribute to the development and management of the tourist guiding subsector. Collaborative efforts can enhance developmental efficiencies, allowing stakeholders to leverage one another's initiatives to improve various plans and strategies. Despite an awareness of the importance of collaboration, an element of friction persists. Some stakeholders, having encountered difficulties, are keen to expand their portfolios and be active within the subsector. Nevertheless, this approach can be perceived by governmental stakeholders as an attempt to monopolise the subsector, thereby diminishing the role of government. In this context, participants expressed the following views:

"There are many aggressive voices within the industry." (P14)

"We are not in that space, and the private sector is attempting to lead. If they take the lead, they will, of course, dictate the course of action in terms of serving their own interests." (P6)

The current state of independent operations among actors does not facilitate the growth and transformation of the subsector. Unfortunately, an unintended consequence of this is the demotivation of guides and other involved stakeholders, resulting in their disinvestment in the subsector: *"It's going to discourage people from entering the industry, and individuals become increasingly frustrated by the* numerous obstacles." (P13). This sentiment was echoed by another participant, who highlighted the importance of collaboration among all stakeholders, particularly for the purpose of providing comprehensive training to tourist guides. At present, there appears to be a disconnect, as those who offer training often lack current hands-on experience as tourist guides, as one participant *noted: "There was significant segregation; even the training providers do not actively engage in guiding."* (P12). This results in guides receiving suboptimal training, particularly as the context in which tourist guides operate is dynamic and subject to numerous changes.

Another facet of collaboration pertains to establishing relationships with relevant stakeholders to effectively target the intended demographic of future tourist guides. For instance, partnering with the National Department of Education to ensure representation at Career Expos by the National Department of Tourism would facilitate widespread exposure of the subsector and promote tourist guiding as a viable career path for youth. One participant recounted: *"The department's presence at the national Tourism Career Expo, with a focus on guiding, was excellent, as it addresses the critical issue of engaging with youth and introducing them to the* field." (P14). It was further noted that collaborations aimed at attracting new or potential guides should be strategic to ensure that these efforts result in an increase in the number of guides entering the subsector. This is particularly crucial given the substantial costs associated with such events and marketing initiatives. Therefore, the outcomes must yield an increase in new guides who will not only enter but also remain within the subsector. In addition to collaborating with government departments, it is vital to consider partnerships with local organisations across various regions. This approach will facilitate awareness of opportunities within the subsector among previously disadvantaged individuals, particularly women and other marginalised groups. Such initiatives can be supported through collaboration between provincial registrars and various organisations, including local social groups, leveraging traditional community structures or partnerships with associations that maintain strong community ties.

The critical role of registrars as key stakeholders has been illustrated in the preceding discussion. Although the role of registrars is predetermined, its implementation may vary across provinces. Given the local context in each province, collaboration with stakeholders, facilitated by registrars, cannot adopt a 'one size fits all' approach. This highlights the necessity for all registrars to possess a comprehensive understanding of their roles and responsibilities, the unique contexts of their provinces, and the capacity to enforce action and decision-making that will foster transformative growth within the subsector.

"Providing registrars with some degree of autonomy is crucial, as legislation permits such flexibility. However, we should adopt a targeted approach, collaborating with local tourism organisations and considering the demographic characteristics of our province, which is predominantly rural." (P6)

***Facilitating Collaboration Among* Stakeholders**

The importance of facilitating collaboration for inclusivity was widely affirmed by participants, given the perceived under-transformed state of the subsector, as illustrated by the following quotes:

"In the adventure guiding sector, we consistently evaluate this through the lens of transformation. To some extent, the subsector remains significantly untransformed." (P11)

"In the field of adventure tour guiding, there exists a shortage of trained, experienced, reliable, and qualified guides. Overall, those who have swiftly and efficiently completed training and qualification tasks tend to be white, benefitting from quality education and the financial means to pay for training." (P10)

Participants emphasised several methods through which collaboration among stakeholders can be facilitated, enhanced, or increased. For instance, establishing clear and open pathways for communication and information sharing was identified as a fundamental aspect of collaboration. This includes keeping all stakeholders informed of changes within the subsector, particularly those driven by government initiatives. A lack of communication and clarity on these matters can hinder governmental, private sector, and other parties from functioning effectively as supportive structures and organisations within the subsector. This theme is also linked to the previously discussed necessity for stakeholders to have a clear understanding of their roles within the subsector.

"We have been working since 2014 but have only recently been invited to present on our activities." (P12)

"I do not believe there is a clear understanding of roles and responsibilities... provincial registrars rely heavily on the department, which has a very different role in managing the affairs of tourist guides. They cannot perform this effectively..." (P1)

Another crucial consideration for facilitating collaboration among stakeholders is the provision of financial and other necessary support to enable them to implement plans for transformation across the subsector, as evidenced by the responses received:

"We require support to achieve this; we need a substantial cash injection. We possess the resources and have delivery partners throughout Southern Africa who are willing to assist, and we have already urged them to include previously disadvantaged candidates." (P13)

"We periodically assist individuals from marginalised communities with tourist guide training, although this is limited due to budget constraints." (P5)

DISCUSSION

The preceding results indicate a clear need for enhanced strategic collaboration among the diverse stakeholders in the tourist guiding subsector to achieve inclusive growth. The current state of the subsector continues to reflect the legacy of the apartheid regime, as well as the more recent impacts of the COVID-19 pandemic (Kapa et al., 2023; Mbatha et al., 2021). Other significant challenges facing the subsector include the introduction of new qualifications for tourist guides, which has generated a degree of concern and confusion among the existing active cohort of guides (SATSA, 2024; Schultz, 2023).

An important outcome of the results is that each stakeholder in the subsector plays a significant role, from the recruitment of tourist guides to their training and long-term career development. The concept of broad-spectrum stakeholder involvement has been noted to be effective within the industry (Bama et al., 2022), with the goal of inclusive development. It is impossible for a single stakeholder to execute all the associated responsibilities due to capacity, skills, and financial constraints. Thus, leveraging the strengths and capabilities of various stakeholders is key to developing an inclusive tourist guiding subsector. The precarious state of the sector in the post-COVID-19 era (Nyawo, 2020), coupled with the systemic qualification changes in the subsector (SATSA, 2024; Schultz, 2023), presents an opportunity to re-examine how development is occurring and to aim towards inclusive growth. Recognising the importance of private stakeholders, such as those from tourist guiding associations and federations, is crucial to ensuring the development of reliable, authentic, and knowledgeable tourist guides. It is also important to understand that for the subsector to be inclusive, it must be developed in a way that provides a viable and progressive career pathway for incoming individuals (Schultz, 2023). Many of the skills that tourist guides must possess are soft skills, which can only be developed over time.

Additionally, a degree of seasonality is embedded in the career of a tourist guide, necessitating guides to structure their finances in a way that allows them to continue in the career. This can be achieved through the professionalisation of the subsector to provide a livable wage for tourist guides, as well as by offering specific financial education and capacity building for guides that enables them to work under these circumstances (Kapa et al., 2023; Mbatha et al., 2021). Tourist guides are often referred to as hosts for tourists, responsible for creating memorable experiences and interactions (Hurombo et al., 2025), thus requiring them to be knowledgeable, flexible, authentic, and possess a flair for storytelling and relating to people from diverse backgrounds (Makopo et al., 2018). It must be acknowledged that not all individuals will fit this role. In doing so, attracting and onboarding potential candidates extends beyond merely including individuals from previously disadvantaged groups to encompass those who have the capability to grow and develop in this role as a career path (Kapa et al., 2022a).

All stakeholders have a role to play in the subsector, some of which are distinct and some of which overlap. It is essential that stakeholders internalise the primary goal of developing an inclusive subsector (i.e., inclusive development) to ensure that this objective is met (Sánchez-Soriano et al., 2024; Chiwawa and Wissink, 2023). Currently, there seems to be a degree of discord not only among the various stakeholder groups but also within the stakeholder domains. For example, it is widely acknowledged that government stakeholders drive the agenda towards a transformed and inclusive subsector (Tourism Sector Masterplan, 2023). However, there appears to be a lack of clarity regarding who is specifically responsible for what. In some cases where clarity exists, there is a lack of capacity (financial or human resources) to ensure that their mandate is fulfilled. Moreover, there seems to be a misconception that the private sector is attempting to hijack the mandate of government, thereby causing an element of friction. It is important that this issue is overcome, recognising that prioritising hierarchy in this instance will be detrimental to the inclusive development of the subsector. Given the various constraints of each stakeholder, it is crucial to leverage all forms of human and financial capital, as well as the experience of those who have been within the industry. Building trust between stakeholders is therefore of paramount importance, with the understanding that all stakeholders are working towards a common goal (see Lekgau et al., 2024; Bama and Nyikana, 2021). This can be facilitated by ensuring that all stakeholders have clarity on their roles and responsibilities within the subsector and by maintaining open lines of communication with other stakeholders (Rogerson, 2021).

Whilst government stakeholders drive the agenda of policy development for the subsector, the private sector is crucial for capacity building and skills development of incoming tourist guides, especially the different types of guides who have specific training and development needs (see Nyikana and Bama, 2023; Tourism Tattler, 2020). The wealth of knowledge accumulated within the private sector is a key component of continued, inclusive development, thereby emphasising the need for cohesiveness among stakeholders. The notion of cohesiveness, through partnerships between the public and private sectors, is not a novel one and has long been touted as an exemplary framework for collaborative management and for leveraging the strengths of stakeholders (Litheko, 2022; Bama and Nyikana, 2021). The new qualification requirements for tourist guides, together with the move towards the professionalisation of the subsector and the reinstatement of it in the post-COVID-19 context, presents a new opportunity for the reestablishment of the subsector as one that is firmly rooted in inclusivity.

CONCLUSION

The importance of the tourist guiding subsector is undeniable, with tourist guides playing a central role in the broader tourism sector nationally. The subsector was severely affected by the COVID-19-induced crisis, leaving a legacy of a lack of active, registered guides, as well as financial constraints for those who remained. The subsector also underwent a series of changes related to the necessary qualifications and training required for individuals to become registered guides. This was done with the end goal of professionalising the subsector, making it a viable career path. The effects of the crises and various changes within the subsector emphasised the need for a high level of cohesiveness and mutual support among all relevant stakeholders. This was a significant finding in the study due to the widespread agreement regarding the lack of awareness of stakeholders' roles and responsibilities within the subsector. This has had a detrimental impact on the ability of various stakeholders to achieve the objectives outlined in key tourism and transformation policies. As a result, stakeholder collaboration within the subsector was underlined as crucial in addressing the resource and capacity constraints felt by various role players in supporting the growth and transformation of the subsector. In this light, the study recommends establishing a professional body, which could include representatives from tour guiding associations, government, higher learning institutions, and tourist guides, to lead advocacy efforts for tourist guides and mobilise resources towards the goals of the subsector. Furthermore, while the research provided valuable insights by focusing on the stakeholders providing the support structure for the subsector, as opposed to the few existing studies that have only examined the views of the tourist guide (see Kapa et al., 2022a, 2022b; Hurombo et al., 2018; Mbatha et al., 2021), it underscores the need for further research attention on issues related to transformation and inclusion within this subsector, especially concerning the registration process and the challenges associated with attaining the necessary qualifications, which further hamper the participation of marginalised groups.

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