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# Spis treści

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# Developing Safety Competencies Among Arctic Nature Guides in Training: An Analysis of Student Experiences

**Abstract.** This paper reports on a yearlong, longitudinal empirical study conducted in Svalbard that sought to explore safety competency development among tour guides undergoing training. This paper seeks to clarify how tour guide training in the Arctic contributes to enhancing safety and risk management competencies. The data-gathering methods employed in this study included participant observation by a researcher immersing herself in learning process of students participating in Arctic Nature Guide program. The purpose of the study was to explore the use of Experiential Learning theory in tour guide program. The findings from the study indicate that Experiential Learning theory may be an effective tool for developing students' safety and risk management competencies. This study contributes to existing knowledge on safety training for tour guides, providing insight into how training programs can best prepare tour guides for functioning in extreme environments. This study also provides recommendations for further research related to tour guide safety training.

## 1. Introduction

Safety concerns related to travel in the Arctic is an emerging research topic in tourism and safety studies, especially in the context of field operations (Adumene & Ikue-John, 2022; Kruke & Auestad, 2021; Albrechtsen & Indreiten, 2021; Indreiten, Albrechtsen & Cohen, 2018; Sydnes, Sydnes & Antonsen, 2017). Although remote locations and extreme weather may be attractive for tourists traveling in the Arctic, these attributes make it difficult for adventure guides to ensure the safety of tourists. Research indicates that there is an urgent need to emphasize tour guide training meant to enhance tourist safety (Weiler & Ham, 2002). Risk management

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and safety training for tour guides in high-risk environments teaches the skills needed for effective coordination, especially during emergencies. Tour guides must possess superb leadership, decision-making, and communication skills in order to maintain safety standards. Moreover, both individual and team training should be implemented to enhance knowledge-sharing capacity (Grote, 2012). Tour guide training in the Arctic is intended to enhance tour guides' capacity to lead guests in inhospitable environments, therefore it is important to understand how guides are trained and what learning theories are used to develop safety and risk management skills. This paper addresses the gap in research on training tour guides who work in extreme environments by examining how the Arctic Nature Guide (ANG) program provides students with reliable knowledge that can be applied to manage risk during adventure tours in the Arctic.

This study employs an ethnographic approach to focus on the experiences of guides in training, with an emphasis on integrating their personal perspectives and interpretations of the learning process. The study focused on examining the key factors related to successful safety competency development for tour guide training in the Arctic. Moreover, this paper contributes to the limited body of ethnographic research on nature-based tourism (Rantala, 2011), particularly in the context of tour guide training and safety practices (Rantala & Valkonen, 2011).

The data analysis identified a pattern of reflection on expanding decision-making capacity, which is in line with Kolb's experiential learning (EL) theory. Experiential learning theory is deeply rooted in outdoor education, and it is commonly used for training (Valkanos & Fragoulis, 2007) and education purposes (Lam et al., 2019; Healey & Jenkins, 2000; Fowler, 2008; Kolb & Kolb, 2017). This paper, however, seeks to expand its potential applications by analyzing its utility for tour guide training.

The novelty of this research it twofold: an exploration of the safety skill acquisition process during tour guide training programs in the Arctic by using participant observation method.

Hence, to fulfill the aim of the research, this paper seeks the answer to the following questions:

- How students' experiences during ANG program influence the process of development of safety and risk management competence?
- What strategies can be used to enhance risk management and safety competence acquisition in guide's training?

This paper first summarizes existing knowledge related to safety in the Arctic, tour guide training programs, and EL theory. Next, the paper examines the ANG

program by describing five cases of students' experiences participating in various activities as part of the training program. This discussion highlights the importance of exposing students to real-world environments (in this case, the Arctic) and importance of encouraging students to take on the role of decision-maker when training as a tour guide, as both approaches are crucial to developing target competencies among tour guide trainees. Finally, the conclusion emphasizes potential future applications of EL theory for developing safety and risk management competencies via training programs. It also addresses further avenues of potential research related to training Arctic tour guides.

## 2.  Literature Review

### 2.1.  Tour Guide Training

The occupation of tour guide has a long tradition of informal learning, where guides often learn on-the job rather than in the classroom. Despite continuing efforts to gain recognition of the knowledge and responsibilities of tour guides, limited research focused on value of guides education (Weiler & Black, 2015). Most research on tour guide training has been conducted in countries where tourism businesses require some form of official certification, such as tour guide licenses (Dahles, 2002; Esichaikul et al., 2020; Huang & Weiler, 2010; Mason and Christie, 2003). Some forms of certification are also required from businesses involved in high-risk adventure sports, such as white-water rafting, scuba diving, and mountaineering (Hunter, 2007; Wilks and Davis, 2000; Mackenzie & Kerr, 2012). In the research on tour guide training, Mason and Christie (2003) argue "that good guide training should lead to change, not only in terms of knowledge and skills, but also in attitude and behavior" (p. 1). Many existing studies on tour guide education, including Brito (2020), Mason and Christie (2003), and Prakash and Chowdhary (2010), evaluate program curriculums and discuss whether programs produce the desired outcomes. However, these studies only discuss the well-known roles of guides, including mediator (Cohen, 1985), "leader, educator, public relation representative, host, [and] conduit" (Pond, 1993 in Mason & Christie, 2003), as well as "educator, information giver, leader, role model, catalyst, mediator, protector, organizer, company representative, [and] facilitator of access to non-public areas" (Weiler & Black, 2015, p. 23). Although these roles are essential to facilitating guests' experiences, they all lack to prioritize the role of guide safety management. The importance of the tour guide for ensuring safety has been mentioned in several existing studies

on guide training and practices, particularly in the context of risk perception and guest experience facilitation (Cater, 2006; Mackenzie & Kerr, 2012). Although these studies discuss the safety practices of guides, it is imperative to understand how guide training can successfully develop guides' risk management skills and which strategies can be used to enhance safety skills acquisition. Therefore, this paper addresses the gap in the literature on how tour guide training can successfully enhance the safety competency development among tour guides.

## 2.2. Guiding in the Arctic: Tour Guides' Roles and Safety Competency

Tour guides must continuously balance ensuring tourist safety with delivering experiences (Weiler & Ham, 2002). This tension must be considered when discussing safety procedures, as guides are responsible for meeting the expectations of various stakeholders (Weiler & Black, 2015). Guides working in the Arctic face a twofold challenge: They must ensure that guests' exposure to hazardous environments is within acceptable limits of risk (Berbeka, 2018; Rokenes, Schumann & Rose, 2015) while also coping with environmental uncertainties, such as rapidly changing weather, the risk of avalanches, the dangers posed by glaciers, and the changing availability of search and rescue services (Figure 1).

Figure 1. The Role of Tour Guides in the Arctic



Guests' exposure within a desired and acceptable scope of risk (Weiler & Ham, 2002; Berbeka, 2018; Rokenes, Schumann & Rose, 2015)

Dealing with uncertainity of the Arctic elements (Albrechtsen & Indreiten, 2021)
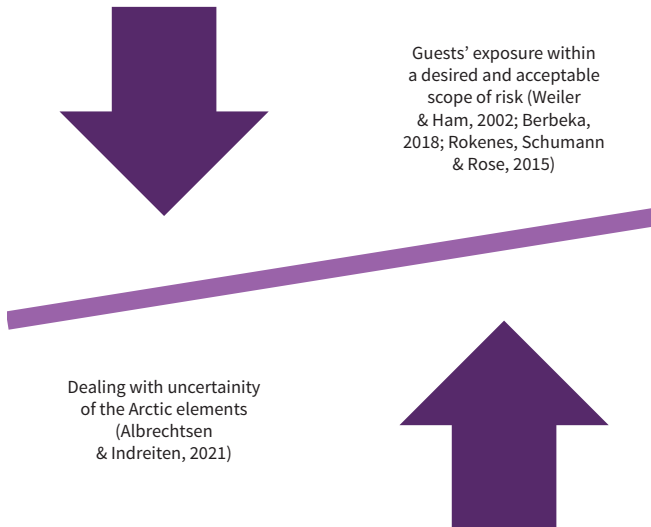
Source: own elaboration based on Albrechtsen & Indreiten, 2021; Weiler & Ham, 2002; Berbeka, 2018; Rokenes, Schumann & Rose, 2015

Arctic safety in an operational context is an emerging research topic in tourism and safety studies. Albrechtsen and Indreiten (2021) have written a comprehensive summary of Arctic safety in operational contexts that addresses several challenges, such as harsh weather conditions, remoteness, limited infrastructure, climate change, and a lack of knowledge and data. In the Arctic climate, guests' wellbeing is dependent on tour guides' sound judgment and decision-making; therefore, it is imperative to understand how tour guides develop their critical thinking and decision-making skills. Tourist safety and accident prevention in the Arctic depend not only on the guide's actions, but also on the organizations where guides are trained and pursue careers.

This paper makes use of the *Arctic guide safety competency framework*, which the author developed as part of her own Ph.D. research. This framework is based on research conducted on tour guides working in Iceland, Svalbard, and Greenland. The findings, summarized in Table 1, reveal that Arctic adventure guides must possess technical, interpersonal, and operational skills as well as situational knowledge to successfully manage environmental risks on trips.

Table 1. Arctic guide safety competency framework

| Technical skills | Interpersonal skills | Operational skills | Situational knowledge |
|---|---|---|---|
| First aid, navigation, reading and understanding meteorological data, avalanche, polar bear safety, skills related to specific activities (snowmobiling, sailing, skiing, climbing, and hunting); the ability to correct use of the equipment | Leadership, planning, organizational, teaching, stress and time management, storytelling skills. the ability to assess tourists' skills; confidence and flexibility | Decision-making and communication skills; | Knowledge of specific weather patterns, terrain, language, sociocultural contexts, local people and nature, and customs and traditions |

Source: based on own research

Although this proposed safety competency framework builds on existing studies in the field of outdoor adventure education, it is unique for emphasizing situational and local knowledge—in this case, situational and local knowledge about the Arctic. Local knowledge has been identified as a mediating factor in decision-making, and therefore, this paper seeks to understand how situational knowledge is dealt with, if at all, by formal training programs. The findings from mentioned study highlight that knowledge is built on training and experience; therefore, this paper explores the use of EL theory for enhancing safety competency development in training programs.

## 2.3. Experiential Learning

There is little research on the competence learning process in tour guide training programs. Therefore, to discuss the use of EL, it is crucial to conduct research in situations where learning resemble real-world situations, such as outdoor adventure education, wilderness education, and environmental education (Martin et al., 2017; Ewert & Sibthorp, 2014). This kind of learning, according to Martin et al. (2017, p. 5) should include "teaching and learning activities and experiences usually involving a close interaction with an outdoor natural setting and containing elements of real or perceived danger or risk in which the outcome, although uncertain, can be influenced by the actions of the participants and circumstances."

Outdoor education is perceived as transactive, and it emphasizes interactions between two words: students and the natural environment, which is also referred to as "sense-making of active engagement between the inner world of the person and the outer world of the environment" (Beard & Wilson, 2006, p. 2). Such interaction increases student's awareness to participate in the process, create meaning and reflect upon gained experiences. EL theory, introduced by Kolb as "learning as the process whereby knowledge is created through the transformation of experience" (Kolb, 2014, p. 49) has strong relation to outdoor education.

Experiential learning theory is based on the recognition that learning is a lifelong process, adaptive in nature, and oriented towards a conceptual bridging across life real-world situations. Drawing on the work of Dewey, Piaget, and Lewin, with Kolb concluding that "the knowledge results from the combination of grasping knowledge and transforming experience" (Kolb, 2014, p. 51). Kolb's EL cycle, which describes the process of learning, is composed of the following components: concrete experience (CE), reflective observation (RO), abstract conceptualization (AC), and active implementation (AE; see Figure 2).

When discussing EL theory, other related concepts developed by Kolb must be mentioned, such as grasping and transforming experiences. Kolb includes several dimensions of the learning process within the cycle, including grasping and transforming experiences. In this context, grasping refers to the act of experiencing or comprehending an experience (CE and AC), and transforming includes reflecting upon an experience (RO) and applying that experience to a real-world situation (AE). Both, grasping and transforming processes are equally important and complementary within the learning process.

Experiential learning theory places emphasis on the learner and the process of competence acquisition. The process needs to be carefully designed and facilitated, as low-quality experiences and lack of reflection will result in poor educational value. In EL theory, learning is a continual process that can be initiated during

▶ Rethinking the ability to change the course; putting the new idea into implementation
▶ Asking, "What can I do now? How should I act to implement changes?"

▶ Experiencing something that affects me; being engaged in something

**Active Experimentation(AE)**

**Concrete Experience (CE)**

**Abstract Conceptualisation (AC)**

**Reflective Observation (RO)**

▶ Understanding the meaning of the experience; forming new ideas
▶ Asking, "What does it mean?" and "How can I learn from it?"

▶ Reflecting on the experience; comparing with my past knowledge

Figure 2. Kolb's Experiential Learning Cycle with Guiding Questions
Source: own elaboration based on Kolb (1984)

any phase of the learning cycle. Consequently, student knowledge acquisition is measured by the student's ability to critically reflect on their knowledge and skills rather than on their ability to achieve tangible program outcomes, such as obtaining technical skills.

Additionally, EL theory emphasizes the processes of adaptation and learning and recognizes knowledge acquisition as a transformational process of creation and recreation. Hence, to fulfill the aim of the research, this paper addresses the process of student's critical reflection on competence development in Arctic Nature Guide program.

## 2.4. Arctic Nature Guide Program in Svalbard

The ANG program in Svalbard is part of the Arctic Friluftsliv bachelor program at the Arctic University of Norway, which offers 60 credits within the European Credit Transfer and Accumulation System. The program can be completed as a one-year degree or as part of a three-year bachelor's degree. The program at Svalbard is the northernmost specialized tour guide program at the university level in the world. Developed in close cooperation with local tourism industry stakeholders,

the program consists of four main subjects: Arctic safety and field leadership, safe tour guiding in the Arctic, value-based guiding and Arctic nature education, and Svalbard history. The curriculum outlines the main learning objectives as follows:

1. Theoretical knowledge of safe travel in the Arctic, outdoor leadership skills, knowledge of nature-based tourism and outdoor education
2. Skills for safe travel in the Arctic and hostmenship
3. Awareness of the responsibilities, skills, and competencies related to leading guests in demanding arctic environments; the ability to reflect on values related to nature experiences (UiT Norges Arktiske Universitet, 2020)

The curriculum content is taught in the classroom and applied during field trips, and students are required to attend all classes and participate in field trips in order to graduate. Practical skills courses on topics such as glacier guiding, multiday hiking, winter camping, skiing, snowmobiling, sea ice crossing, avalanches, motorboats, and first aid are part of the program. Students must also complete a five-week practice placement, during which students initially follow an experienced guide, to eventually practice guide's role within learning settings. The program also partners with the University Centre of Svalbard, where students take courses on Arctic safety and leadership and receive field assistance during field trips from technical staff. The courses focus on field leadership, as well as technical skills such as Arctic first aid, snowmobile driving, travel on sea ice etc. Each year, approximately 25 to 30 students attend the program, and most are of Norwegian origin. The program is taught in English.

The ANG program enables students to engage in hands-on activities in order to fulfil the numerous objectives of the program. This paper will now examine the relationship between learning outcomes and EL theory in order to better understand the learning process in the ANG program.

## 3. Methods

### 3.1. Research Process

This study is part of the author's larger Ph.D. project, which focuses on the role of Arctic tour guides in managing tourist's safety, as well as the role of training in enhancing safety competency. This research employed an empirical, longitudinal study tracking safety competency development among students of the ANG pro-

gram in Svalbard. Competency development at tour guide training schools occurs mainly through cooperative learning that involves students working together and collaborating on group tasks. This is consistent with a constructivist approach, where "learning occurs when one plays an active role to construct one's knowledge whereas teachers create a platform with challenges and coach them in the learning process" (Chaille, 2008 in Harfitt & Chow, 2020, p. 27). The researcher employed a constructionist approach in order to collect field data on cooperative knowledge creation and classroom interactions and generate meaning upon analyzing observations from the field (Crotty, 1998).

The author, as a participant observer, conducted ethnographic research on a group of students training to become tour guides in the Arctic. The author gathered data by observing and taking field notes on students' behavior during classroom instruction and field trips. The research practices included direct observation, participation in group activities and discussions, note-taking, and self-analysis. Prior to data collection, the researcher identified herself to the group of students and teachers, gained informed consent, and explained her research objective for shadowing the classroom activity. Participant observation involved the following steps: (1) gaining access to the training program upon dialog with the program coordinator; (2) explaining the objectives and methods of the research project to the students and collecting consent from participants; (3) observing classroom activities and collecting data; (5) analyzing data and organizing data into themes; (6) completing the research by drawing an conclusion. The researcher acted as a participant and observer and remained in these roles without taking part in any decision-making processes. During the first few field trips, students approached the researcher seeking advice; however, the researcher explained that she was unable to offer advice as she was simply an observer. The students respected her explanation.

During this yearlong study, various methods of data collection were employed, such as field interviews, photographs, field notes, surveys, and in-depth interviews. For the purpose of this paper, the primary sources for data analysis derived from participant observations, collected as field notes.

### 3.2. Data Analysis

Ethnographers do not always specify their research questions before entering the field; indeed, they sometimes observe their study subjects while employing an inductive and integrative approach (Reeves et al., 2013). Likewise, the research questions for this study were formalized during the time spent in the field conducting observation. The notes taken by the researcher consisted of six 48-page field notebooks, 28 memos, and several field voice recordings. ATLAS.ti software

was used to organize the digitalized data, while the notes in the notebooks were analyzed manually. It is while observing the students that the author formulated the following research questions:

- How student's experiences during ANG program influence the process of development of safety and risk management competence?
- What strategies can be used to enhance risk management and safety competence acquisition in guide's training?

These questions motivated the researcher to focus her observations on students' interaction with potential tour guide environments and discussions that focused on reflecting on those interactions. By exploring this relationship, the researcher sought to identify patterns of how students discussed their skills and knowledge. In the following analysis patterns are presented as cases, each representing learning context- student's milestones in gaining knowledge and experience, including reflective sessions upon skill acquisition.

## 4.  Results

### 4.1.  Identification of Student Experiences During the ANG Program

In the process of data analysis of students' descriptions of the *experiences* during the ANG program, following themes were identified: opportunity and activity. After the initial selection of themes, examples of students' experiences (*further referred as cases*) observed by the researcher were selected and analyzed in the context of codes (action, discussion, exposure, experience, and reflection) as factors influencing the understanding of the elements of the development process. As re-organizing, searching, and re-linking are part of the research process (Reeves et al., 2013), Table 2 was designed as a tool for illustrating the relationship between the themes, codes, and cases. Table 2 also provides a rigorous explanation of the process of safety competence acquisition over time. Activity 1 occurred at the beginning of the study, and Activity 5 occurred at the end of the study.

The findings are summarised in the form of five activities in which students gained experiences during the ANG programme. Each activity (consisting of description of learning environment, learning content, discussion set up and skill development represents an EL cycle, while all experiences (activities 1–5) make up

a yearlong learning cycle (where each consecutive activity builds on the knowledge gained from the previous one).

Table 2. Student Experiences During the ANG Program

|  | Case 1 | Case 2 | Case 3 | Case 4 | Case 5 |
|---|---|---|---|---|---|
| Activity | Hiking | Glacier rescue training | First aid and leadership course | Final skiing trip | Classroom discussion |
| Learning environment | Polar bear territory, exposure to leadership and decision making | Harsh weather, unfamiliar terrain, exposure to social interaction | Remoteness, exposure to leadership role | Guiding guests in the Arctic terrain, being a team member, situational leadership | Reflection on learning environment (leadership role in the Arctic including technical, interpersonal, operational and skills and situational knowledge) |
| Learning content | Issues related to lack or limited knowledge and experience on Arctic safety | Various experiences and background between group members, glacier travel, hiking; interpersonal skills | Technical and operational skills; leadership role | Planning and facilitation of the trip; guide's role in experience creation; interpersonal skills | Performing leadership role, active participation in course as group member; decision making in Arctic environment |
| Discussion set-up | Small group | Small group | Whole class | Small groups and guests | Whole class |
| Skill development area and strategy for improvement | Need for more experience and input from others for better decision-making, improving leadership style | Integrating various experiences and time management in harsh environment | Acquiring skills related to the ability to sustain life in a remote and cold environment; situational leadership | Recognizing the learning process, including role-play and exposure to the elements of Arctic safety and guiding as important in developing competence | Maintaining *competence toolbox* for decisionmaking based on obtained experience and skills related to guiding groups in the Arctic |

Source: own research

Before each trip, students were divided into groups. Once in groups, students planned and prepared for the upcoming activity: They identified group challenges, mapped the various needs and competencies of each group member, and decided

on the group rules. After being divided into smaller groups, the student left the campsite. They hiked different routes during the day but met at the same location to set up camp. This was done primarily so that they could share responsibility for the polar bear watch, which lasted from arrival until departure the next day. Each morning, the "guide of the day" took the lead until lunch, when another person was appointed leader and guided the group to the camp. The purpose of this arrangement was to enable students to practice different roles, solve problem and make decision as guides. Each trip typically lasted five to six days. Each trip typically lasted five to six days. Students were accompanied by teachers for the first four days. After four days, the teachers left the students alone after ensuring that they had established safe camp and hiking routines.

After the activity was over, the group engaged in a discussion, which included presenting their work to the class. As the year progressed, the students became increasingly independent in their planning. They organized a final skiing trip with guests, identified and planned a route, maintained relationships with guests, and solved problems during the trip. The various activities were as follows: a multiday hike (September), glacier travel — rescue practice (October), a first aid and leadership course (late October), a final skiing trip (May), and a final debriefing at the end of the program (June).

## 4.2.  Activity 1: Multiday Hiking Trip

**Description:** After breakfast on day four, the teachers left the field trip location with students who were unable to continue the trip due to health reasons. The remaining students were left to make their own decisions. While some students had already worked as tour guides, for others it was a first-time experience and an opportunity to practice their decision-making and problem-solving skills as guides. The group that the researcher followed was the last one to leave the camp, and the guide in charge displayed a relaxed attitude. Guides can delegate tasks to other group members, and this guide had sent someone else to walk in the front of the group while himself chatted with the group members in the middle. During breaks to adjust clothing or drink water, some students looked confused; they somewhat expected to be given clear instructions from the guide about time and group management during the hike. Such issues eventually escalated into a bigger discussion during lunchtime. Some students who were in Svalbard for the first time were worried that their safety skills were not adequate to travel in polar bear territory. One student recounted a polar bear encounter from the first camping trip two weeks prior to the hiking trip. On that occasion, students guarded their campsite against a polar bear for several hours.

**Reflection:** One of the guides for the day initiated a discussion on leadership style and decision-making. Some students expressed their concerns regarding different leadership styles in relation to specific safety threats, such as polar bears.

One of them criticised the choice of the lunch location: although it a patch of hollow ground, which offered protection from the wind, it made it difficult to spot polar bears. This remark was acknowledged by the guide in charge, who described the situation as a "difficult Svalbard choice" between a location with good visibility or one that provides protection from the wind and cold. The decision was evaluated as being the result of "forgetting about the Arctic environment," and was used to highlight the need for guides to gain proper experience and knowledge so that their decision-making skills could improve. According to another student, a decision, such as where to stop for lunch, must be made after consulting with all group members. She said: "If nobody speaks up, then the rest of the group will be unaware of the issue, and it cannot be expected that the problem will be fixed."

### 4.3. Activity 2: Glacier Rescue Practice

**Description:** Students practiced glacier rescue on a glacier in outskirts of Longyearbyen town, the place where students live and study. The exercise required preparation, practice, and documentation of group work, and group members worked together before, during, and after the exercise. In the morning, before heading to the glacier, students gathered at the designated meeting place. Some members were late, and therefore, the group was not ready to leave on time. Once on the glacier, the groups worked together in the roped team (technique used for traveling as group on the glacier) taking part in a "crevasse rescue operation." Once the exercise was over, the followed group prepared to leave the glacier. Some students were taking longer to pack their belongings, making other students impatient and concerned about the unpleasant cold weather and wind. There was a lack of transparent communication between group members; some were left behind, posing a safety risk associated with polar bears. Because the snow was deep, walking back was strenuous and became more challenging, causing gaps between group members to increase. Once back in town, the group decided to discuss the tension between group members.

**Reflection:** Since the discussion was to be held in the kitchen of the house inhabited by some of the students, the group agreed to eat first and then conduct the discussion. The conversation began with addressing the different expectations of group members. This led to a discussion on differences between team members, their previous experiences, especially in relation to safety in the inhospitable Arctic environment. This helped the group to become aware of differences between each member's physical and mental abilities and their previous background. Time

management, especially in the context of upcoming winter trips, was mentioned as a crucial factor contributing to safety. The group did not reach a conclusion; however, the discussion was described by one of the student as "not nice, but needed".

## 4.4.  The First Aid Course and Leadership

**Description:** Students took part in a three-week course on risk analysis, situational leadership, and first aid. Each part of the course consisted of lectures followed by practical exercises. During the week of first aid course, students were able to practice emergency medical cases indoors and outdoors, often working in cold and windy conditions. The discussion took place at the end of the 40-hour first aid course. It was a summary of an outdoor exercise day outdoors, with case scenarios. The debriefing took place in a classroom in the presence of the instructors involved in the first aid course.

Reflection: Students were asked to reflect on the experiences and explain their tasks and roles. Students mentioned experiencing difficulties communicating with rescue services via a satellite telephone. They also experienced stress when reading coordinates from a map and had challenges with decision-making. Students also reported feeling frustrated when the arrival of outside help was postponed. However, they appreciated the exercise as an opportunity to be exposed to "real environment," such as cold and isolated environments which can affect leadership performance and decision-making. Each exercise involved a few hours of exposure to the environment, which helped make students aware of the "seriousness" of the situation. This also highlighted the need for better leadership skills when leading a group.

## 4.5.  Activity 4: Final Skiing Trip

**Description:** The last field trip was a six-day skiing trip that involved students guiding groups of guests. The trip began indoors with an explanation of the plan for the ski trip. Next, members of each group introduced themselves. Afterward, each group went skiing on the mountain and gathered at the joint campsite at the end of the day with other groups. Finally, all of the groups returned to town. At the first pre-departure meeting for each small group, the students asked the guests to introduce themselves and describe their expectations regarding the trip. These included things like wanting to explore Svalbard nature, ski on glaciers, or learn how to camp in the winter. Some group members, who possessed an extensive background in winter sports, mentioned that they had never gone on a multiday skiing trip and had never tried winter camping. This trip provided students with

many opportunities to talk to guests, as everyone gathered for meals in the afternoon and evenings when they talked and got to know each other. In the middle of the trip, especially during the long skiing days, the difference between guests with more skiing experience and those with less experience became more noticeable. However, frustrations of individual tourists had no effect on social interactions between them. During the last two days, the groups spent many hours chatting and discussing their experiences during the trip. The discussions took place after dinner when students served cake and coffee. The groups gathered in the "lunch pit," which was a circular structure made of snow that had walls to lean on. While openly sharing their experiences, the group members sat comfortably next to each other with a clear view of the mountains and the fjord.

**Reflection:** The discussion started with one of the student asking guests what they had learned during the trip. While many expressed their gratitude for being able to take part in the experience of skiing in Svalbard, a few focused on the personal challenges they encountered during the trip. Two of the comments are worth mentioning: one was made by a person with broad experience in skiing and winter traveling who stated that he was "okay with not reaching the goal but enjoyed learning about different people in the group on the trip and felt part of the group." The other comment came from a guest with less experience in winter camping and skiing and focus on her physical condition, expressing her satisfaction with being able to camp on the glacier and ski in such consistently cold weather.

Then, the guests asked the students what they had learned during the year. One of the students stated "learning how to be more comfortable with the winter in Svalbard." Another mentioned, "to work with others and trust my group." The student emphasized that by working with students from a previous trip, they had developed a mutual understanding and respect for each other's space and leadership style while working toward the same goal. Having been able to guide "real guests" instead of just their peers was cited as an important opportunity for applying the knowledge they had learned in the classroom to a real-world scenario.

One student stated that previously she had not been interested in guiding but developed a better understanding of the role of a tour guide due to the training program. She mentioned that being given the responsibility of ensuring the wellbeing of other people and dogs enabled her to see "the bigger picture." She also mentioned that she is considering working as a tour guide after she graduates. Another student mentioned that "being able to make mistakes and learn from them" was crucial to developing his tour guide skills.

## 4.6.  Activity 5: The Final End-of-Year Debrief

**Description:** The last discussion of the year involved the entire student's group and was conducted indoors, upon finishing the exam trip. Students discussed the skiing trip and reflected on their experiences over the past year. Students were situated in a U shape, with the teachers in the front of the group, forming a shape resembling a circle. The discussion started with the teachers reflecting on the logistics and organization of the skiing trip. At the end of the discussion one of the teachers said that the students had accomplished a lot.

**Reflection:** Reflecting on their working and living environments, especially during their experiences as guides during practice placement, students mentioned becoming familiar with the elements of the Arctic environment. Students mentioned the interplay between the hazard of Svalbard—that is, cold temperatures, darkness, and polar bears—and their responsibility as guides to protect guests from the elements while exploring the Arctic environment. They particularly benefited from opportunities to practice crevasse rescue, use navigation skills, and look after the safety and well-being of the group members by preventing blisters and ensuring they were hydrated; they learned how important these skills were in preventing the escalation of safety issues. One student stated that her perception of safety in the Arctic environment changed over the course of the year: "First, you think that everything can go wrong, then you learn that maybe only some things can go wrong, but at the end [of the program] you realise that you have the skills to travel in different areas and deal with those challenges."

When discussing the topic of competency, students expressed what they considered important, highlighting the combination of various skill sets, which can be described as a kind of *competence toolbox* including:

- hard skills related to safety, e.g. knowing how to use the glacier equipment, and
- soft skills necessary to interact with customers or guests, because without them, it is more difficult to ensure safety; this includes the ability to convey knowledge.

"You need a foundation of hard skills, and then soft skills take you further; you cannot have one without the other" he said.

The discussion was summarized by one of the teachers who said that being able to recognize things before they happen, as well as going out, sharing, discussing, and learning from each with an open and honest attitude is what really matters and what helps to create a good atmosphere among fellow guides.

## 5.  Discussion

This paper explored how the experiences of students participating in the ANG program were transformed into reliable knowledge that was applicable to working as a tour guide in the Arctic. This paper addressed the gap in the literature regarding safety and risk management skills development by observing learning processes at a tour guide training program using EL theory with a focus on the EL cycle of grasping and transforming experience. The findings presented in the previous section show that the program helped the students to develop their critical thinking skills and ability to make decisions as leaders of the respective groups. While tour guiding need reflective practitioners (Mason & Christie, 2003), it is important to acknowledge the role of students in the learning process. Therefore, EL may be an effective method for tour guide programs to develop safety competency, since it treat's students' experiences as essential to the learning process.

### 5.1.  The Experiential Learning Cycle

During the training program, students participated in field trips that required preparation, active participation, and debriefing in both small and large group settings. Moreover, self-reflection allowed students to process their experiences and relate them to previously acquired knowledge. Group discussions, in which students shared their subjective narratives enhanced their safety awareness and motivated them to seek other solutions and implementing them in the next phase. Through various experiences, students went through all four stages identified in Kolb's EL cycle: preparation (Active Experimentation — AE), participation in a trip (Concrete Experience — CE), group and class reflection (Reflective Observation — RO), and knowledge formation (Abstract Conceptualization — AC).

The first trip, during which students encountered a polar bear, had a strong impact on students' perceptions of the risk of conducting tours in the Arctic. Indeed, this trip influenced their awareness and behaviors in the field, and other experiences (exposure to various elements of the Arctic environment) influenced students' perceptions of self-preparedness regarding handling safety and risk when conducting tours in the Arctic. The students realized they needed to master a set of specific skills, which one student described as competence toolbox. This is consistent with Healey and Jenkins' (2000, p. 190) view that "the central practical applications of the EL theory include how a session, or a course, can be developed in a way that takes students systematically through the whole cycle, as well as the consideration of the teaching methods that are particularly valuable at certain stages of the cycle."

## 5.2.  Grasping and Transforming Experiences

Students used reflection as the key to understand their experiences during activities. Through discussion, they re-evaluated their existing knowledge and then applied what they had learned during following trips.

This transformation of experiences occurred during the reflection phase (RO), in which students focused on the inclusion of the previous experiences including social and environmental settings, which allowed students to better prepare (AE) for upcoming trips. The findings show that students' reflections during multiday hikes indicated a lack of or limited experience with Arctic environments and a limited understanding of safety when traveling in polar bear territory. The importance of transforming experiences (RO and AE) is also recognized in a studies by Rokenes & Andersen, 2016 (p. 750) on decision-making among skiing guides, highlighting that the "important part of *friluftsliv* [outdoor education] competence is for the guide to constantly and instinctively analyze the situational risks and consequences." As students progressed in their studies, gained more exposure in the Arctic environment (harsh weather, remoteness) and tour guiding (including technical, operational and interpersonal skillset), they were encouraged to develop their competencies in processing and applying new information (grasping experience).

Exposure of being a guide and taking a different role (CE), enhanced students ability to understand (AC) the situation of tourists during guided trips and their own responsibility as guides. This is especially important in the Arctic environment, where guests with various backgrounds rely on the guide's technical competence and ability to strike a good balance between the level of risk and quality of tourist experience (Figure 1). This was most evident at the beginning of the year, when students had the least amount of trust for one another. Exposure to the Arctic conditions that tour guides must work in and opportunities to practice leadership skills are elements that contribute to knowledge transfer. According to Sibthorp et al., (2011, p.113) "learning should involve characteristics of the environment in which learning is applied or to which learning is transferred".

## 5.3.  Safety Competency and Experiential Learning

The findings demonstrate that students reflected on their technical, interpersonal, and operational skills and enhanced their understanding of local nature. The activities covered here included discussions of polar bear safety, first aid skills, planning, organization, leadership, time management, decision-making, and communication.

In particular, in discussions, students mentioned that their exposure to real-life tour guide situations and decision-making scenarios increased their confidence and leadership skills. For them, the field trips served as learning environment in which they were faced with new challenges (CE) and could learn from their own experiences (RO, AC, and AE) before engaging in another activity (CE). In other words, this element of the training program included the complete EL cycle. Figure 3 shows student's activity at each stage of the EL cycle and the type of environment (social and geographical) in which they practiced different skills that a tour guide must possess.
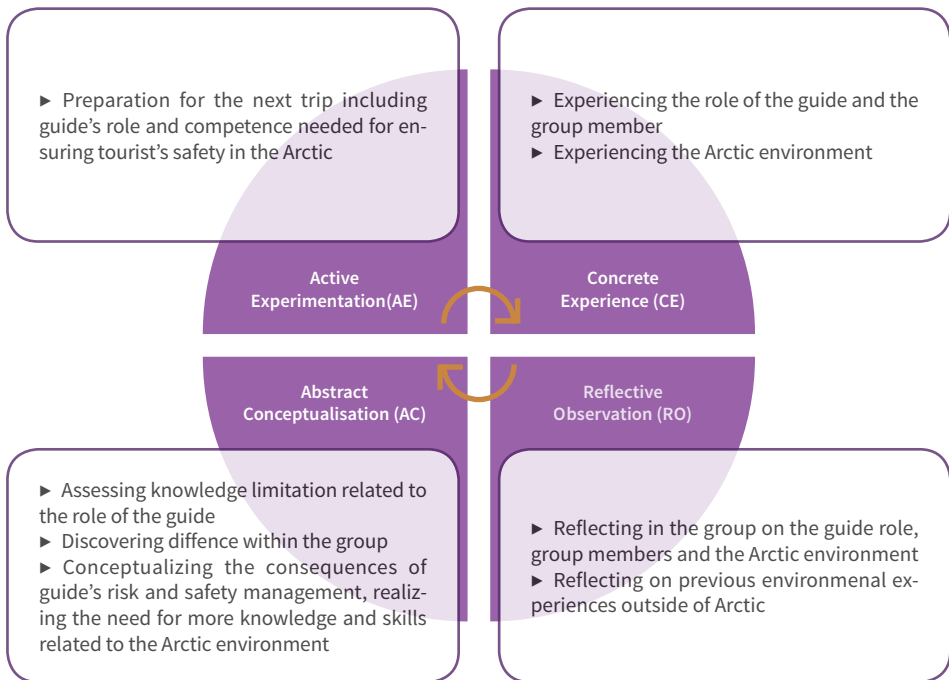


Figure 3. The Use of the Experiential Learning Cycle for Analyzing the
Experiences of Students During the ANG Training Program
Source: own research

## 6. Conclusions

These research findings indicate that tour guide training programs should include various activities and experiences that enable students to evaluate their own knowledge and reflect over decision-making process. By striking a balance between grasping and transforming experiences, the teaching process can address

various learning objectives, including the development of technical, operational and interpersonal skills, while expanding local and situational knowledge, in this case concerning the Arctic environment. Students exposed to the various activities and experiences can engage in continuous and increasingly complex knowledge creation (re-creation), which corresponds with EL premises.

While many tour guide training programs attempt to develop key competencies during short course, it is necessary to appreciate the value of students becoming aware of the process of the competence acquisition during such programs. Student's ability to learn from their own experiences gained in real settings resembling their future work environment plays a key role in developing their safety competence. While certain technical skills, such as using glacier equipment, interpreting weather forecasts, and driving a snowmobile, can be taught over a relatively short period, the acquisition of knowledge that serves as a mediating factor between competence and decision-making requires process of reflection.

Students' exposure to situational problem-solving, real-time scenarios, and real-life tour guide experiences should be included in training programs. By shadowing another guide and then taking on the actual role of guiding tourists' student have a much better change to develop their critical thinking together with key skills required in their job.

To conclude, this study contributes to existing research within outdoor education by providing an initial exploration of the use of EL in tour guide training programs. While the findings of this study indicate that the EL cycle can be used to evaluate students' safety competency development, more research is needed to better understand the curriculums of current tour guide programs, as well as their design and implementation. Follow-up studies on existing programs are also needed. This paper explores the use of EL theory and provides a foundation for future exploration of the use of EL as an analytical strategy for evaluating tour guide training programs. In this way, this study enables researchers to better understand the process of competence acquisition and retention and enhances knowledge transfer strategies.

## 7.  Research Limitations

Given the scope of this article, it does not include all aspects of existing research on outdoor education. Experiential learning is often criticized for its lack of clear positioning: some consider it as a philosophy, others as a method of teaching, still others, as a field of science. Similar ambiguity exists in the Norwegian literature

on outdoor education, which is referred to as *frilustliv*. There are few publications in English that discuss *friluftsliv* and the development of safety competence, especially in the context of formal education. Some authors call for more integrated and in-depth research on program facilitation (Dahl et al., 2016; Dahl, Leirhaug & Moe, 2023).

The training activities described in this article are subjective ethnographic investigations of how safety competence develops. In addition to inherent subjectivity of participant observation, the presented findings reflect the subjective nature of data analysis, which was influenced by the author's personal beliefs and experiences, both as a former student of the program, an active tour guide and outdoor teacher in the Arctic region. While these shortcomings cannot be ignored when analyzing the findings of the study, it is the author's unique background that made it possible to include these various perspectives in her research.

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## Rozwój kompetencji przewodników w zakresie bezpieczeństwa arktycznego: analiza doświadczeń uczestników programu Arctic Nature Guide

**Streszczenie.** W artykule przedstawiono wyniki badania przeprowadzonego na Svalbardzie, którego celem było zbadanie rozwoju kompetencji przewodników wycieczek w zakresie bezpieczeństwa na terenach arktycznych. Na podstawie obserwacji zebranych podczas jednorocznego programu szkoleniowego Arctic Nature Guide autorka opisuje, w jaki sposób program ten przyczynia się do rozwoju kompetencji kursantów w zakresie bezpieczeństwa arktycznego. Szczególną uwagę zwrócono na rolę uczenia się przez doświadczenie. Uzyskane wyniki wskazują, że ten rodzaj uczenia się może być skutecznym narzędziem rozwijania kompetencji w zakresie bezpieczeństwa. Niniejsze badanie zawiera wskazówki na temat tego, w jaki sposób organizować szkolenia z zakresu bezpieczeństwa, aby jak najlepiej przygotować przewodników wycieczek do pracy w ekstremalnych warunkach.

**Słowa kluczowe:** przewodnik turystyczny, kompetencje w zakresie bezpieczeństwa, uczenie się przez doświadczenie, turystyka arktyczna

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# Study Abroad Departures: A Case Study of the Influence of Chinese Families in Location Decision Making of Study Abroad

**Abstract.** This paper explores the decision making process of Chinese students when choosing to study abroad, focusing on an under-represented group in the literature: students' families. The paper has three objectives: 1) To explore the relationship between Chinese parents and their children in the context of a decision to study abroad; 2) To discover the rationale offered by parents for influencing their child's decision; and 3) To investigate the role of the macro environment on the family decision-making process in the context of international education. Primary qualitative evidence is presented, drawing on semi-structured data collected in China with families between 2022–2023. During this period of time strict control of China's borders remained in the context of pandemic management. The findings of the study reveal that parents in China exhibit high levels of involvement and interest in their children's international education decisions. Financial capability empowers parents to have a stronger voice than their children concerning the decision-making process. Social capital is one of the motivations for parents to support the study abroad for their children. Destination managers, university management, recruitment agents and policymakers need to pay deeper attention to the role of parents in international education decision-making. A deeper understanding of parental ambitions, concerns and wishes would facilitate more targeted marketing and an improved student experience.

**Keywords:** study abroad, global education, student mobility, Chinese families

## 1. Introduction

Universities have a long and storied history of attracting international students, with foreign teachers and students in European universities dating back to the mid-sixteenth century" (Kerr, 2001). This trend has continued to grow exponentially, with the number of students studying overseas skyrocketing from 150,000 in 1955

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to a record number of 1,061,511 Chinese students looking for a degree abroad in 2021 (ICEF Monitor, 2023), reflecting the increasing global mobility of students seeking higher education opportunities (Naidoo, 2009; UNESCO, 2019).

In recent years, China has emerged as a significant contributor to the growth of international students, with 2.51 million Chinese students studying abroad from 2016 to 2019 and over 703,500 students venturing abroad in 2019 alone, marking a notable increase of 6.25% from the previous year (Ministry of Education of China, 2020; Yu, 2020). Since 1978, the total number of Chinese students who have pursued education overseas has reached a staggering 6.56 million, with a significant proportion of 4.23 million of them returning to China after graduation, indicating the growing impact of Chinese students on the global higher education landscape (Ministry of Education of China, 2020). The number of outbound students from China since 2016 can be seen in Figure 1.

In line with the dramatic expansion of higher education and the devaluing of domestic degrees in China (Mok, 2020), young people are increasingly choosing international universities to secure good jobs and achieve upward social mobility or maintain their social position (Tsang, 2013). Middle- and upper-class families have more options for their offspring and believe that studying abroad may create new opportunities for differentiation based on the current social reproduction, which is uneven in terms of education options (Perkins & Neumayer, 2014).
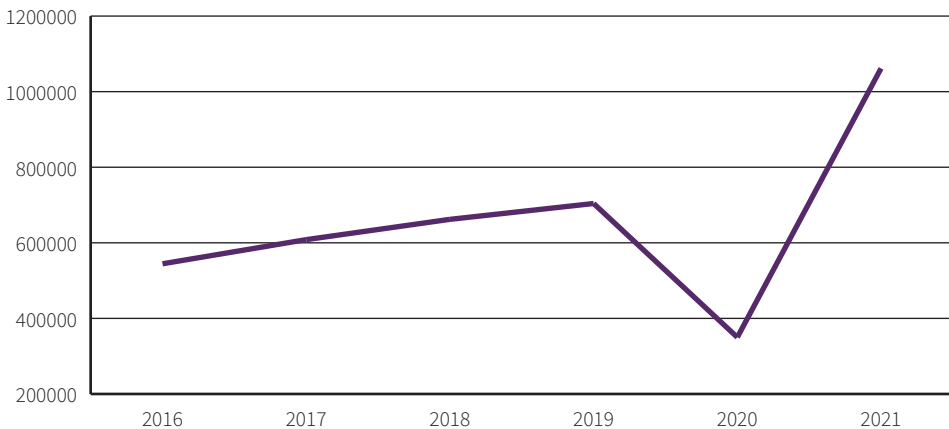


Figure 1. International outbound student numbers from China
Source: ICEF Monitor, 2023; MOE China, 2020

Chen et al. (2013) believe that in the context of Chinese society, parent-child relationships prioritise interdependence, with parents often assuming a guiding and even intrusive role in their children's private lives. Chinese youth experience

autonomy described as "relating" or "inclusive," in which they feel autonomous even when acting independently. Adolescents' well-being is not based on whether they make decisions themselves or leave them to their parents but whether they do so willingly (Chen et al., 2013). Chinese adolescents who make independent decisions out of personal conviction experience more psychological need satisfaction and higher well-being (Chen et al., 2013).

## 2.  Literature Review

From the supply perspective on international education and destination marketing, previous research has argued for the inclusion of international students as tourists in the tourism studies literature, given international students' cross-border movement, their economic impact, the socio-cultural consequences of host-guest interactions, and their potential for destinations (Gullace & Griffin, 2021). Our cross-sectional study considers one of the world's largest study abroad markets, Chinese university students, as international tourists, and argues that destination and education marketers need to pay deeper attention to both the potential of the market and the influence of students' families in attracting economically significant students to their regions.

From the demand perspective, numerous studies have shown that parental involvement strongly predicts students' academic achievement and positive school behaviours (Anderson & Minke, 2007; Flouri & Buchanan, 2004). In China, it is uncommon for parents to share power with their children in decision-making, and obedience and conformity are highly valued virtues in Chinese culture (Yang & Laroche, 2011). Therefore, after parents say "no", negotiating is usually not an option, which could impact students' decisions on whether to study abroad and where to study.

Family influence has been reported as a key factor affecting the choices of international education (Lawley, 1993; Mazzarol & Soutar, 2002). However, most studies only mention two aspects of family influence: recommendation and financial support. Pimpa (2005) argues that the influence of family on students' choices of international education extends beyond just these two aspects and could include expectation, persuasion, and competition. Additionally, Bodycott (2009) suggests that marketers need to pay greater attention to cultural values when recruiting students from Confucian societies like China. Despite China's exponential financial and social development, traditional Confucian values are still largely upheld by parents, which can impact students' social and academic well-being beyond the initial decision-making (Bodycott & Lai, 2012).

Chinese students are often raised in a culture rich in Confucian ideals, which emphasise the importance of education, respect for family traditions and authority, and the value of "filial piety" (Salili et al., 2001). Filial piety is a cornerstone of Confucian Chinese culture, and it involves devotion, love, respect, obedience to one's parents, and the preservation of family honour and lineage (Leung et al., 2010). According to Chao (1994), filial piety, or "Xiao Shun," is the key concept of Confucianism in Chinese family life. The term "Xiao" refers to the younger generation's duty to respect their elders, while "Shun" means obedience and compliance. This set of cognitions, affects, intentions, and behaviours concerning being good or nice to one's parents is a specific and complex syndrome (Yang, 2007). Kwan (2000) argues that filial piety is an indigenous construct essential to understanding Chinese psychology and social relations.

Filial piety has been further developed into two models: reciprocal filial piety and authoritarian filial piety Yeh (2003). Reciprocal filial piety involves respecting and loving parents and supporting and memorialising them Yeh (2003). This model emphasises emotional and spiritual attention to one's parents and physical and financial support out of gratitude for raising one. Providing for parents' material and non-material needs is an act of respect and responsibility that one should carry towards them (Kwan, 2000; Nainee et al., 2016). Authoritarian filial piety, on the other hand, emphasises obedience, indebtedness to parents, impulse control, proper conduct, and inhibition of self-expression (Ho, 1994). This model can be broken down into two aspects: oppressing oneself and glorifying one's parents' reputation for the force of role requirement (Yeh & Bedford, 2003).

Traditional parenting styles in China have been greatly influenced by Confucian cultural values, which have traditionally emphasised parental control over children's decisions. However, there is evidence of a shift towards a more liberal parenting style (Bodycott & Lai, 2012). Regardless of these changes, children remain the centre of the family, and their upbringing is influenced by the importance placed on filial piety (Liu, 2018). This cultural value is particularly salient given China's one-child policy, which has been in place for the past three decades.

Research has shown that filial piety beliefs tend to be negatively related to parent-child conflict among adolescents and positively related to happiness in adults (Liu et al., 2000; Yeh & Bedford, 2003). However, filial piety has also been shown to be positively correlated with authoritarian moralism and cognitive conservatism in children (Ho, 1994). Children who endorse filial piety values tend to demonstrate a passive, uncritical, and uncreative learning orientation and hold fatalistic, superstitious, and stereotypic beliefs (Ho, 1994). Kwan (2000) discovered that Chinese students may struggle with choosing an academic major

that meets their parents' expectations, which can lead to fear of disapproval and guilt for disappointing their parents.

International education can provide valuable outcomes, such as foreign language proficiency, cross-cultural awareness, cosmopolitan vision, and ideologies, that fall under the category of embodied cultural capital. Formal Western qualifications and degrees are considered institutionalised cultural capital that can be converted into economic capital in the labour market (Bourdieu & Richardson, 1986; Savicki, 2008). The experience of studying abroad, with its inherent exposure to diverse cultures, can also assist in accumulating social capital, which can benefit future careers and social development (Crossman & Clarke, 2010).

## 3.  Methodology

This study aims to understand the role Chinese parents played in their child's selection of a foreign location and higher education institution (HEI). The project draws on the multidisciplinary theoretical framework, including sociology, tourism and geography, to understand if and how Chinese parents play a role in influencing a critical education decision. Understanding the decision-making process of the students and their parents regarding the study location can provide insights into the flow of Chinese students into different countries. This, in turn, can have implications for the tourism industry in those host countries. A higher number of Chinese students studying in a particular country may lead to increased tourism-related activities, such as visits by family members, future trade relationships, tourism by the students themselves during breaks, etc.

The key objectives of the study are:

1. To explore the relationship between Chinese parents and their children in the context of a decision to study abroad;
2. To discover the rationale offered by parents for influencing their child's decision;
3. To investigate the role of the macro environment on the family decision-making process in the context of international education.

This study is inductive, exploratory, and qualitative in nature. The data gathered is rich with an intention to explore motivations, relationships, and aspirations. There is no intention to quantify or model, given the scale and diversity of the

Chinese population. The research method tools are semi-structured interviews and focus groups with a variety of stakeholders, including parents, children, international recruitment agents, university and high school educators and other relevant influential people (see Table 1). Interviews were conducted between 2022 and 2023, both online and face-to-face in English where possible, and others were conducted in Mandarin and translated and transcribed into English.

Table 1. Key interview details

| # | Type of Interview | Interviewee type | Language | Approx length |
|---|---|---|---|---|
| 1 | In-depth interview with a parent | A professional: A mother whose child is studying in abroad; | Chinese | One hour |
| 2 | In-depth interview with a parent | A teacher: A mother whose child has been studying abroad since very young age; | Chinese | One hour |
| 3 | In-depth interview with a parent | A businessman: A father whose daughter is in top level university in China but considering studying master course in abroad; His son is in middle school with weak academic background; | Chinese | One hour |
| 4 | In-depth interview with an education professional | A manager of an educational agent | Chinese | 50 minutes |
| 5 | In-depth interview with an education professional | A university lecturer who looks after international cooperation program | English | 50 minutes |
| 6 | In-depth interview with an education professional | A university staff working at the international office | Chinese | 50 minutes |
| 7 | In-depth interview with an education professional | A manager of an international educational organization | Chinese | 50 minutes |
| 8 | In-depth interview with an education professional | A consultant from an educational agency | Chinese | 45 minutes |
| 9 | In-depth interview with an education professional | A recruitment office from a foreign university in China | Chinese | 50 minutes |
| 10 | In-depth interview with an education professional | A foreign teacher working at the international school in China | English | 45 minutes |
| 11 | In-depth interview with an education professional | A consultant from an educational agency | Chinese | 50 minutes |
| 12 | In-depth interview with an education professional | A manager who has been working within the Irish higher education | Chinese | One hour |

| #     | Type of Interview                    | Interviewee type                                              | Language | Approx length |
|-------|--------------------------------------|---------------------------------------------------------------|----------|---------------|
| 13    | In-depth interview with a student    | A university student who does not have plan to go abroad      | Chinese  | 40 minutes    |
| 14-15 | In-depth interview with a student    | Two students who are from the international program           | Chinese  | One hour      |
| 16    | In-depth interview with a graduate   | A returnee student from abroad                                | Chinese  | One hour      |
| 17    | Focus group with students            | A group of 6 students from international program              | Chinese  | One hour      |

Source: Authors

## 4. Findings

Three findings emerged from the interviews: 1) Evidence indicated that Chinese parents demonstrate high levels of involvement and interest in their child's international education decision-making, 2) Children showed a strong adherence to their parent's wishes in line with filial piety norms, 3) Pragmatic issues, such as the Covid19 pandemic, have increasingly overshadowed internal family discussions in recent years.

### 4.1. Chinese parents' level of involvement

High levels of involvement and interest in their child's international education emerged as a key finding from interviews. Parents want to be involved and strongly influence the discussion and the final decision about where the child will go for international study. The overall theme of autocratic decision-making came up repeatedly in interview responses, particularly in the context of economic influence; whoever has the money to pay for the fees and study abroad will yield the strongest influence. Thematic analysis of the interviews highlighted this issue repeatedly. For example, from the parental perspective, one participant stated that:

> whoever has the right to speak at home will make the decision. Because a Chinese-style family is not a democratic-style family, it is generally not possible for people to sit down and discuss together. If grandparents are rich, grandparents decide. I see husband and wife; usually, whoever has more control makes the decision. (Respondent 2, parent)

Another participant emphasised the significance of economic status within the family and highlighted how the parenting style of the couple could affect their children's decision-making.

The first is the economy; the second is the ideological height between husband and wife. If one party has a high ideological height, it must be that he will have more right to speak, and he will be the master. Third, character. If you assume that your wife is a very impatient person, you are a very annoying person. You have to discuss with her before making this decision, and you have to think about your strategy before consulting. (Respondent 3, parent)

Interviews with the students illustrated that they shared the same perspective on the top-down decision-making process. Respondent 13, a prospective student, stated that it was clear there was little choice but to listen to parents and that their own views didn't matter if they didn't have individual financial capacity.

To be realistic, the money is still with my parents, so I think they should have more decision-making power. I have no choice if they don't want me to study abroad. Because I don't have the financial capacity. (Respondent 13, student)

This view was also evident among education professionals. However, they offered a more holistic perspective, noting that while some may be open to discussion on country and major, beyond money, the parents would also consider the child's character.

It's still parents because parents need to consider from a comprehensive perspective, not simply responding to their children's decisions or thoughts. He must consider it from a comprehensive perspective. The economy is an unavoidable topic. Economic conditions and the student's character, parents will think he is suitable for going out, which is also a very important link. (Respondent 9, education professional)

Generally speaking, parents have a stronger voice than students. Parents normally would say they would agree with their kids' thoughts. Those thoughts are mostly within the detail of country destination and perhaps which major. Parents would consider the abovementioned students' suggestions, but parents take the lead in making decisions for most other details. Most of the parents have the deciding power. (Respondent 12, education professional)

## 4.2.  Filial piety norms and international education decision-making

While finding 1 illustrated the non-democratic decision-making in families regarding international education, finding two demonstrated that children either strongly adhere to their parents' wishes in line with filial piety norms or were encouraged to think this way. One interviewee, for example, stated that:

> They don't have time to think. So, you must trust your parents. (Respondent 8, education professional)

While a similar view states that:

> Since the parents have decided, they should obey the parents' arrangements. Such families and children account for a considerable part of the total number of people going abroad. (Respondent 9, education professional)

Interestingly, gender did not feature in many of the interviews in the context of filial piety. However, a student interviewee (14) said she was supported to go abroad because she was a woman.

> They have higher expectations for my brother in the future and hope that he can take on more family responsibilities. My parents would prefer my brother to study in China. They feel that the family will need my brother's help in the future, that there will be a lot of decision-making matters, and they don't want him to go too far. (Respondent 14, prospective student)

> Our generation may call this aspect of filial piety more important. They are relatively indifferent, but the indifference is because they do not understand, which does not mean they do not have this feeling. After I communicated with my daughter in this regard, she basically accepted it. (Respondent 3, parent)

The parents mentioned previously also ensure that their daughter behaves properly towards her grandparents. The father requires their daughter to call her grandparents at least 2–3 times a month and visit them in person at least once a month, despite her busy schedule.

Overall, the evidence suggests that children in Chinese families strongly adhere to their parents' wishes, aligning with the cultural norm of filial piety. This adherence often precedes independent decision-making and reflects the trust in parents' judgment. Filial piety is a cornerstone of Confucian Chinese culture (Bodycott &

Lai, 2012). It is the critical concept of Confucianism in the Chinese family (Chao, 1994). The parents' aspiration for their children's education is also crucial in shaping their educational decision-making (Davis-Kean, 2005). Filial piety plays a pivotal role in shaping children's attitudes and behaviours, reinforcing the influence of parents in the context of international education decision-making.

## 4.3. The influence of practical issues

Our third finding highlights the growing significance of pragmatic concerns in internal family discussions regarding decisions about international education. Proximity to China emerged as a crucial factor when families consider sending their children abroad, with Japan and Singapore being popular choices due to their relative closeness. This perspective demonstrates the influence of geographical convenience on decision-making. Safety concerns were prevalent among parents, particularly regarding the pandemic and security problems in certain countries like the United States. These considerations emerged as significant obstacles for some families contemplating international education. In one instance, an interviewee expressed their perspective, stating:

> I believe the fundamental subjects taught in high school and college remain static while our society constantly progresses. What is the value of stagnancy? For instance, the chemistry, mathematics, and physics we learned in the past will be forgotten if we don't apply them in our work. Such knowledge doesn't contribute significantly to our professional endeavours; hence, it can be considered static. (Respondent 1, parent)

During In-depth interview 15, a student shared their father's perspective on the cost-effectiveness of studying abroad:

> My father believed that given the current economic environment, the epidemic situation, and the fact that I am an only child, he hopes I can take over the family business as soon as possible. Consequently, he perceives the cost of studying abroad as relatively high in comparison. (Respondent 15, Prospective student)

In interview 12, an education professional shed light on the motivation behind the demand for studying abroad:

> The middle school entrance examination admits only 50% of students into high school. Many families must find alternative solutions if their children fail to be admitted. Hence, studying abroad becomes an appealing option. (Respondent 12, Education Professional)

Additionally, during In-depth interview 8, another education professional highlighted families' reluctance to send their children too far from home:

> When families consider sending their children abroad, the proximity of the destination country to China becomes a significant factor. For example, many parents are now choosing Japan as a destination due to its relative closeness. Another popular option is Singapore, owing to the prevalence of the Chinese language there. (Respondent 8, education professional)

Furthermore, In-depth Interview 11 uncovered other pragmatic issues:

> Every family places great importance on the cost of studying abroad. However, cost doesn't solely refer to monetary aspects; the safety of their children is also a paramount concern. The United States' current security problems are particularly notable, causing many parents to worry even if they desire to send their children there. (Respondent 11, Education Professional)

A student participating in In-depth interview 13 expressed their parents' reservations about letting them go abroad, citing the ongoing pandemic, political factors, international relations, economic conditions, and the family's specific circumstances as reasons for their reluctance.

Similar sentiments were shared during in-depth interviews 14 and 15:

> My parents still perceive going abroad as highly dangerous due to numerous online news reports highlighting the freedom in foreign countries, which compromises pandemic control. They believe it is not as safe as China, leading them to consider the pandemic a significant obstacle to my overseas plans. (Respondents 14–15, prospective students)

These and similar comments underscore the growing influence of pragmatic factors, including the COVID-19 pandemic and security concerns, in shaping internal family discussions concerning decisions about international education. Recognising and recording the growing significance of practical considerations in international education decision-making is crucial for ensuring well-informed, equitable, and beneficial educational choices for students and their families. It also has implications for policy, resource allocation, and cross-cultural understanding within international education.

## 5.  Analysis & Discussion

Chinese students make up the largest international student population in the world, with their numbers continuing to grow. The decision to pursue international education opportunities is significant for Chinese families, and it is influenced by a range of cultural, social, economic, and practical factors. Understanding these factors is essential for destinations, university promoters, higher education institution leaders and government policymakers seeking to engage with Chinese students and their families.

In the context of Chinese parental influence on their children's international education decisions, the interviews consistently highlighted the manifestation of elevated levels of parental involvement and profound interest. Discernible factors encompassed within this phenomenon include economic leverage, ideological consonance and dissonance considerations, and personal attributes, such as the child's character, which synergistically bestow decision-making authority upon parents. It is noteworthy that notwithstanding students' possession of autonomous thoughts and desires, they frequently find themselves obligated to consent to their parents' preferences due to their financial dependency. Consequently, these insights bring to the fore the formidable agency parents exert in shaping their children's choices concerning international education.

In the context of Chinese familial dynamics, the interviews highlighted that children consistently demonstrate profound deference to their parent's wishes, dutifully aligning themselves with the deeply ingrained cultural precept of filial piety. This adherence frequently supersedes their capacity for independent decision-making, serving as a testament to the implicit trust vested in parental discernment. The salience of filial piety in shaping the attitudes and behaviours of children is undeniable, effectively bolstering the influence parents wield within the realm of international education decision-making.

One of the most prominent cultural values in Chinese society is the importance of the family unit. The high level of parental involvement and children's obedience to their parents' wishes reflect this value. In international education decision-making, this cultural value can have significant implications. Parents often play a central role in the decision-making process, and their concerns and preferences can influence their children's choices. However, external factors also play an increasingly prominent role in international education decision-making by Chinese families. Pragmatic concerns such as the quality of education, job prospects, and future career opportunities are becoming more critical in the decision-making process. This shift highlights the impact of globalisation and the changing nature of the global economy on international education decision-making. This is a crucial considera-

tion for those promoting international study destinations and Table 2 summarises the recommendations for destination management, university promoters, higher education institution leaders, and government policymakers.

Table 2. Recommendations for recruitment stakeholders

| Stakeholder | Theme | Consideration |
| --- | --- | --- |
| Destinations: | Understanding Market Dynamic | Destinations seeking to attract international students, particularly from China need to recognise the significant role that parents play in the decision-making process. They can then adapt their marketing strategies to appeal not only to students but also to parents who are influential in the choice of study location. |
| Destinations: | Building a Safe and Supportive Environment | Given the impact of the Covid-19 pandemic on decision-making, destinations need to prioritise safety and well-being, and perception of same, in their marketing efforts. Assurances regarding health measures, student support services, and crisis management are appealing to students but crucial for parents. |
| Destinations | Cultural Awareness | Cultural sensitivity is crucial. Understanding Chinese cultural values and expectations can help destinations create a welcoming environment for students and their families. Simple welcoming and promotional activities, such as recruitment videos with Chinese translations, will benefit here. |
| University Management | Family-Centric Approaches | Universities and colleges can develop family-centric marketing and engagement strategies. This may involve addressing the concerns and priorities of both students and parents, such as academic excellence, safety, and job prospects after graduation. |
| University Management | Supporting International Students | Educational institutions should provide comprehensive support services for international students, including those related to accommodation, health, and mental well-being. These services should be communicated to students to instil confidence and allay parental concerns. |
| University Management | Recruiting International Students | Collaborating with schools and education agents in China can help universities connect with parents and students effectively. These partners can act as intermediaries and provide valuable insights. |
| University Management | Program Flexibility | Post-covid, universities can consider offering flexible program options, such as online and hybrid courses, which may address concerns related to travel restrictions and health. This flexibility can be appealing to students and parents alike and could be used to promote the destination for future visitation/ recruitment. While covid may never resurface, it is likely parental anxieties will linger for a period. |
| University Management | Transparency and Communication | Clear information on program delivery, safety measures, and contingency plans is essential. Leaders should maintain transparent communication with both current and prospective international students and their families. |
| University Management | Transparency and Communication | Promote diversity and inclusion on campus. Highlight the international student community and the support structures in place to help them adapt to a new culture |

| Stakeholder | Theme | Consideration |
|---|---|---|
| Government and Policy | Promoting Soft Power: | Higher education is a means of projecting soft power for countries. Policymakers can support initiatives that promote their nation as a welcoming and attractive destination for international students, strengthening international relationships. |
| Government and Policy | Pragmatic Issues | Governments can review and adapt visa and immigration policies to address the changing needs of international students and their families, especially in times of crises like the Covid-19 pandemic. |
| Government and Policy | Crisis Response Plans | Policymakers should work with educational institutions to develop and communicate clear crisis response plans that address health, safety, and logistical issues during emergencies. |

Source: Authors

Chinese students largely grow up in a culture rich in Confucian ideals, which place a high value on education, respect for family traditions and authority, and ideals of filial piety. Filial piety, or Xiao Shun, is a cornerstone of Confucian Chinese culture and an essential element of the Chinese family system. Understanding the concept of filial piety is crucial for education destination promoters, educators, and policymakers seeking to engage with Chinese students and their families in the context of international education. By recognising the importance of filial piety in Chinese culture, educators can work to create a more culturally sensitive and inclusive learning environment for Chinese students, and policymakers can develop policies that consider the cultural values and expectations of Chinese families.

China is the largest source of international students globally, with hundreds of thousands of Chinese students studying abroad each year. While the COVID-19 pandemic has significantly impacted the plans of Chinese students who wish to study abroad, this will likely be only temporary.

## 6. Limitations, Concluding Remarks and Directions for Future Research

This study provides valuable insights into the phenomenon of Chinese parental involvement in international education decision-making. However, it has several limitations that need to be considered. Firstly, the study is cross-sectional, providing a snapshot of the phenomenon at a specific time, which may differ from long-term trends or changes in parental involvement and decision-making processes.

Secondly, the study was conducted during the COVID-19 pandemic and amid shifting geopolitical issues, which may have disproportionately influenced the find-

ings. The impact of these external factors on parental decision-making may not be generalisable to more stable or typical periods.

Thirdly, the study's qualitative focus needs to provide quantitative data to measure the extent of parental involvement or the influence of various factors on decision-making. This may limit the generalizability of the findings and hinder comparisons with other populations or contexts.

Finally, the sample of interview participants may have needed to be more balanced towards those from large urban areas, potentially overlooking the perspectives of parents and students from rural or less-developed regions in China. This may limit the study's representativeness and generalizability across the diverse Chinese population.

Future research could employ longitudinal designs, consider the influence of external factors in a more specific context, incorporate quantitative measures, and ensure a more diverse sample to address these limitations and provide a more comprehensive understanding of the topic. While the scale of the Chinese market is vast, modelling the motives, locations of study and input factors would provide valuable evidence for destination managers, university promoters and policymakers.

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## Wyjazdy na studia zagraniczne: analiza wpływu chińskich rodzin na wybór miejsca studiów zagranicznych

**Streszczenie.** Artykuł analizuje czynniki wpływające na decyzje chińskich studentów co do wyboru miejsca studiów zagranicznych, koncentrując się na grupie dotychczas niedostatecznie uwzględnianej w literaturze przedmiotu, a mianowicie na rodzinach studentów. Autorzy postawili sobie trzy cele: 1) zbadanie relacji między rodzicami a dziećmi w odniesieniu do decyzji o podjęciu studiów zagranicznych; 2) identyfikację powodów, którymi rodzice kierują się, próbując wpływać na decyzję dziecka; oraz 3) zbadanie roli, jaką odgrywa szerszy kontekst społeczno-ekonomiczny w rodzinnych decyzjach na temat studiów zagranicznych. Analiza opiera się na danych jakościowych zebranych podczas wywiadów częściowo ustrukturyzowanych z rodzinami, przeprowadzonych w Chinach w latach 2022–2023, kiedy w kraju tym obowiązywały ścisłe kontrole graniczne w związku z pandemią COVID. Stwierdzono, że badani rodzice wykazują wysoki poziom zaangażowania i zainteresowania decyzjami swoich dzieci dotyczącymi studiów zagranicznych. Ze względu na możliwości finansowe rodzice posiadają silniejszy głos w procesie decyzyjnym niż ich dzieci. Jednym z powodów, dla których rodzice wspierają ambicje swoich dzieci dotyczące studiów za granicą, jest budowanie ich kapitału społecznego. Osoby zajmujące się zarządzaniem logistyką turystyczną w ośrodkach recepcji turystycznej, kierownictwo uczelni, urzędnicy odpowiedzialni za rekrutację, jak również decydenci powinni zwrócić większą uwagę na rolę rodziców w podejmowaniu decyzji dotyczących studiów zagranicznych. Głębsze zrozumienie ambicji, obaw i życzeń rodziców ułatwiłoby bardziej ukierunkowany marketing i poprawę doświadczeń studentów.

**Słowa kluczowe:** studia zagraniczne, edukacja globalna, mobilność studentów, rodziny chińskie

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# The Evolution of the Craft Beer Industry in the Global South: The Experience of South Africa

**Abstract.** The global rise of craft beer production and consumption has generated a growth of literature across a range of disciplines. Neo-localism is one of the major concepts explaining the emergence of craft beer landscapes in the Global North. This paper analyses the case of South Africa as an example from the Global South of the burst of a craft beer culture and the emergence of an economy of craft beer. The aim in this paper is to investigate the historical development, structural features and spatial organisation of the craft beer industry in South Africa as well as its neo-local manifestations.

**Keywords:** craft beer, South Africa, neo-localism, craft beer tourism

## 1. Introduction

Alcoholic beverages enjoy a long history across different cultures and societies (Patterson & Hoalst-Pullen, 2014). One of the most remarkable shifts observed in recent decades has been the global growth of fermented craft beverages including craft beer (Garavaglia & Swinnen, 2017a, 2017b; Cabras et al., 2023). Although the modern-day craft beer movement has its genesis in the USA it is increasingly evidenced in a growing number of countries globally (Reid, 2021; Hasman et al., 2023). Across many countries of the Global North the beer industry has recently experienced a radical makeover in terms of landscapes of production and consumption. Elzinga, Tremblay & Tremblay (2015, p. 248) contend that the stimula-

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tion of demand for craft brews (re-) invents beer as a serious consumption good to be paired with food, rather than simply as a liquid that quenches a thirst on a hot day or offers an inexpensive buzz. Chapman (2015, p. 102) pinpoints that the formerly monolithic world of beer has been transformed by a new beer culture, which is distinguished by "variety, diversity, ingenuity, creativity and unbridled excitement".

Arguably, this international rise in the popularity of craft beer "has caught the attention of researchers from many different academic disciplines" (Withers, 2017, p. 12). An international review conducted by Durán-Sánchez et al. (2022) demonstrates that craft beer is a recent area of study that has seen a worldwide expansion. Further, a systematic review of research on craft beer, conducted by Nave et al. (2022), indicates that a growing number of economics and business science researchers have been studying the beer market, branding and consumer behaviour. In addition, the review highlights a rise in craft beer scholarship since 2015. Research conducted mainly by geographers and tourism scholars address-es themes of space, place and identity, local economic development as well as of the sustainability and environmental issues surrounding the craft beer industry (Schnell, 2013; Mathews & Picton, 2014; McLaughlin, Reid & Moore, 2014; Reid, McLaughlin & Moore, 2014; Fletchall, 2016; Rogerson, 2016 Kline, Slocum & Cavaliere, 2017; Reid & Gatrell, 2017a, 2017b; Argent, 2018; Slocum, Klein & Cavaliere, 2018; Debies-Carl, 2019; Ingram, Slocum& Cavaliere, 2020; Wojtyra, 2020; Pezzi, Faggian & Reid, 2021; Wartell & Vazquez, 2023). According to Reid and Gatrell (2017a, p. 102), "the craft beer industry has leveraged place-based identities, recon-figured tourism geographies, and transformed the beer-scape of a global industry at all scales". In explanations of the remoulded geographies of beer across various countries in the Global North a core theoretical underpinning is that of 'neolocal-ism' (Flack, 1997; Eberts, 2014; Schnell & Reese, 2003; Patterson & Hoalst-Pullen, 2014; Hasman et al., 2023).

The internationally changing beer-scape is not, however, merely a phenomenon observed in countries of the Global North. For example, Belmartino and Liseras (2020) document the growth of a thriving craft beer market in Argentina. The booming production and activities of craft brewers in Brazil (de Oliviera Dias & Falconi, 2018) and the emergence of a craft beer industry in India have also been examined (Patwardhan, Dabral & Mallya, 2019). The case of South Africa offers a further illustration from the Global South of the burst of a craft beer culture and the emergence of an economy of craft beer (Rogerson & Collins, 2015a, 2015b). The aim in this paper is to investigate the historical development trajectory and spatial organisation of the craft beer industry in South Africa as well as its neo-local manifestations.

The discussion is organised into two major sections of material. The next provides the international context of the expansion of the craft beer industry and the nexus of neo-localism. The following section turns to South Africa and records the historical emergence of the craft beer industry its key drivers, organisation, geography and influence of neo-localism on the country's craft beer-scape. The analysis draws upon a national audit that was undertaken of the growth of micro-breweries in South Africa and supplemented by 53 semi-structured interviews conducted (in 2016 and with follow-ups in 2021) with craft beer entrepreneurs about the organisation and challenges of their businesses. Material on the COVID-19 impacts is drawn from industry documentary sources.

## 2. International Context

Following the experience of the United States over the past 30 years, other parts of the world have seen an increase in the production and consumption of craft beer, which is part of the new 'beveragescape' involving craft distillers and craft cider producers. Craft breweries are rapidly expanding in the United Kingdom, across much of Europe, Australia, New Zealand, parts of Asia and recently in several countries in the Global South. Among others, Kline & Bulla (2017, p. 3) associate this recent surge of craft beverages in the USA as "an expansion of the local foods movement, which is a rejection of the notion that our food must be sourced from monolithic and industrialized producers". This is linked more broadly to a growth in demand for craft-based products and a movement in which people demand goods and services that have a connection with the 'local'.

The term neo-localism is now widely applied to describe the phenomenon of a craving for a sense of belonging to or affiliation with a local community (Schnell & Reese, 2003; Graefe, Mowen & Graefe, 2018; Ingram, Slocum & Cavaliere, 2020). Shortridge (1996, p. 10) first introduced the term neolocalism and described it as the "the deliberate seeking out of regional lore and local attachment by residents within a community". The resurgence of local identity as a concept can also be attributed to studies conducted by several cultural geographers (Flack, 1997; Schnell, 2011, 2013; Schnell & Reese, 2003). Brain (2011, p. 9) maintains that the concept of neo-localism "represents a lens for discussing the ways in which individuals experience the impacts of globalization". Conventionally, neo-localism is viewed as an opposition to globalisation as both consumers and tourists seek to immerse themselves in the 'distinctively local' in an effort to have an 'authentic' experience (Ingram, Slocum & Cavaliere, 2020).

Travellers search for authentic, local and place-based experiences, which offer holistic connections to the places they visit. According to Schnell and Reese (2003) neo-localism is evidenced in the active, conscious attachment to place. Eades, Arbogast & Kozlowski (2017, p. 60) reflect that scholars of neo-localism "largely define it and the identities that constitute neo-localism as formed and replenished by a particular local space". Schnell (2013) forwards that the foundations of neo-localism can be associated with different ways in which the term 'local' is perceived as well as understood by participants through several interconnected neo-local movements. Indeed, Schnell (2013) describes the trend towards individuals and communities becoming more engaged with this so-called counter-movement as predominantly because the term 'local' is essentially perceived "as a primary form of identity, and the promotion of people thinking of themselves not only in the sense of abstract symbols, but also in terms of what they buy, what they eat, whom they interact with, and identifying not only with their own places, but with the idea of place itself" (Schnell, 2013, p. 82). It is argued that neo-localism, has the potential to support ecologically and culturally appropriate development which is grounded in place attachment (Ingram, Slocum & Cavaliere, 2020).

Arguably, therefore, neo-localism is a concept widely invoked to account for the international growth of the craft beer industry. As discussed by Myles and Breen (2018, p. 166) craft breweries "produce an identity-laden product that boosts local and regional economies". At the broadest level of analysis therefore the international growth of craft beer must be interpreted as another facet of the emergence and strengthening of a counter-movement to globalization which emphasizes the importance and vitality of artisanal production and local connections. Reid & Gatrell (2017a, 2017b) identify three core factors that can explain the popularity of craft beer, namely the renewed interest in supporting local economies through purchasing local products, the rise of place-based local economic development and the observed importance of millennial consumers in beer markets as a driver of demand for craft beer. Buratti (2019) notes that for a younger generation of beer consumers the origin of production is a major factor in their purchasing preferences.

Place-based local economic development has expanded around craft beer as cities and local governments acknowledge the potentially significant contribution that craft breweries can make to local development prospects, neighbourhood change and urban redevelopment. O'Brien (2020, p. 23) observes that the "craft beer industry has effectively leveraged the consumption trend of localism as an expedient and pragmatic competitive position against established and once nearly omnipotent national and international big beer brands". Holtkamp et al. (2016, p. 66) interpret neo-localism as "a conscious effort by businesses to foster a sense of place based on attributes of their community". This reconnection occurs because

craft breweries use local elements in the naming and labelling of their beers to create a sense of place and strengthen ties with local communities (McLaughlin, Reid & Moore, 2014, p. 137). Nevertheless, Eberts (2014, p. 176) observes that because brewers usually have to obtain their key ingredients, such as barley and especially hops, from a variety of non-local sources, they evoke localness primarily through "the art of brewing itself and the narratives of place they employ in their marketing". This observation is supported by Buratti (2019), who notes that small independent craft beer breweries — flagships of neo-localism — use core ingredients — hops and barley — that are often not sourced locally. Most craft beer is therefore locally produced but not from locally sourced ingredients. Buratti (2019, p. 5) goes on to say that "microbrewers and brewpubs must foster a local identity in other ways, including product and company naming, employing local imagery, storytelling, and sustainability and community involvement".

The mushrooming of craft breweries is linked to a business model involving their attempts to differentiate themselves from macro-brewers (Garavaglia & Swinnen, 2017a). The model emphasizes the 'authenticity' of craft beer products and a propensity for constant innovation, the development of new beer styles and an effort to connect with customers through distinctive and individualistic business approaches. In the USA the adoption of 'sustainable' business practices has been part of the craft brewing culture as a whole and the way micro-brewers distinguish themselves from larger macro-beer producers (Withers, 2017). Craft breweries exemplify one of many ways that communities reaffirm local identities in the wake of the impacts of globalisation on homogenising tastes and products (Flack, 1997; Schnell & Reese, 2003). Cappellano et al. (2023) explain how craft micro-brewers in several countries seek to promote territorial branding strategies and link to a 'sense of place' According to O'Brien (2020), beer product branding often draws inspiration from local cultures and utilizes ideas from stories, ingredients, history to produce a distinctive beer label design. Craft microbreweries utilise neo-localism to market their products by using local place names, people, events, landscape features and icons on their labels and in the names of their beers to establish associations with the local environment and culture (Fletchall, 2016). According to Graefe, Mowen & Graefe (2018, p. 28), in addition to using local names, images and history to market their products, craft breweries are often also "active partners in local and environmental causes and organizations".

As the neo-localism movement has strengthened, so does the potential interest in consuming local beers during visits to local microbreweries. Reid (2021, p. 317) points out that a defining feature of craft beer consumers is a desire to drink craft beer at the point of production, "which ensures that beer is enjoyed in its freshest state". This is one of the underpinnings of craft beer tourism. Local

development policies and initiatives to leverage beer tourism for local development have given rise to the proliferation of beer trails and beer-themed festivals (Bujdoso & Szucs, 2012; Slocum, 2016; Alonso, Sakellarios & Bressan, 2017; Eades, Arbogast & Kozlowski, 2017; Myles & Breen, 2018; Williams & Shapiro, 2023). As was earlier the case with wine tourism, the global craft beer revolution has triggered the emergence of craft beer tourism, which is another dimension of change in tourism (Saarinen & Rogerson, 2021). There is a growing international research interest in craft beverages and specifically in the role of craft beer tourism in urban regeneration, neighbourhood change as well as rural development (Wartell & Vazquez, 2023). This development has created opportunities for tourism growth in peripheral regions and small town areas, which can benefit from neo-localism and beer tourism offerings (Pezzi, Faggian & Reid, 2021). Craft beer development and tourism are interpreted as creative local responses to peripherality, with beer entrepreneurs becoming local actors/agents of change establishing such businesses (Pezzi, Faggian & Reid, 2021).

## 3. The Craft Beer Industry of South Africa

The following analysis of the craft beer industry of South Africa is organised into three sub-sections, namely (1) an historical overview of the evolution of the industry, (2) structural drivers, organisation and geography, and (3) the influence of neo-localism in shaping the industry.

### 3.1. Historical Evolution of the Industry

Beer brewing in South Africa has a long tradition (Corne & Reyneke, 2013), with a distinctive history of the production of traditional African sorghum beer as documented by Rogerson (2019). The modern evolution of brewing beer in South Africa, specifically as an industrial activity, is largely associated with the operation of three enterprises, namely Ohlssons Cape Brewing Limited (established in 1882), Chandlers brewing (established in 1884) and, most importantly, South African Breweries Limited (established in 1889) (Tucker, 1985). A significant historical milestone in the South African brewing industry was the amalgamation of these three dominant brewing enterprises in 1956 into South African Breweries Limited (SAB) (Tucker, 1985). Another critical moment was the merger in 2002 between SAB and the US Miller Brewing to form SABMiller (Mager, 2010). Following the merger, this enterprise became a global player in the production and marketing of a range

of beers and one of the largest multinational brewing companies. In October 2016, however, SABMiller was acquired by Anheuser-Busch InBev.

Within the South African market, SABMiller was the leading producer of (malt) beer in the country, with an estimated 95% local market share and owning over 150 beer brands (Mager, 2010). In common with trends observed in USA, UK and Australia, South Africa has witnessed the appearance and growth of a craft beer sector of microbreweries (Rogerson, 2016). It can be argued that following global trends and the consolidation of SABMiller, which led to the production of increasingly standardized lager and light beers, there emerged a countermovement in South Africa's beer industry, which has existed over the past 30 years and closely resembles the trends observed in several countries in the Global North. This movement was sparked by the growing interest of South African consumers in 'older' beer styles, such as pale ales, porter, brown cask ales, stout and bitters (Corne & Reyneke, 2013). In this respect the development and growth of the South African microbrewing and craft beer industry is not dissimilar to that experienced in countries of the Global North during the early 1970s and 1980s. One difference is that initially this development happened on a smaller scale than in the USA or UK and that until recently the rate of microbrewery formation in South Africa was relatively slow (Rogerson & Collins, 2015a).
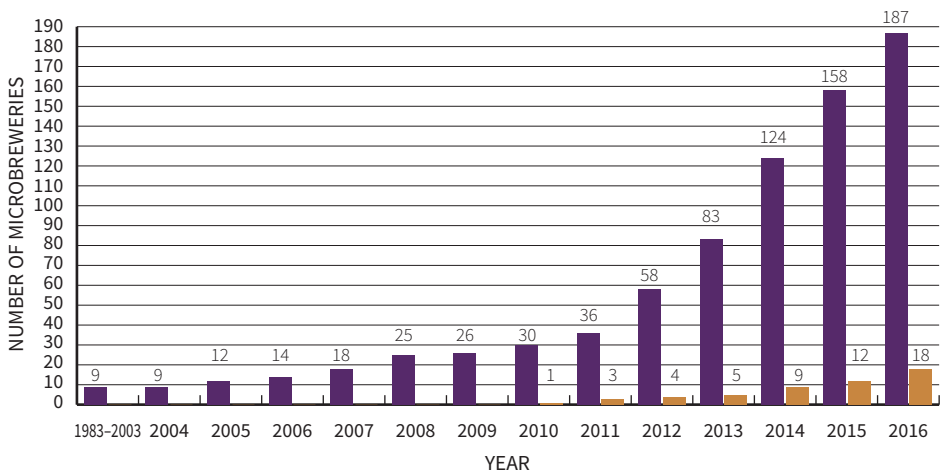


Figure 1. The number of craft breweries in South Africa, 1983–2016
Note: Purple bars denote breweries operating in a given year while orange ones
represent brewery closures recorded in that year. Source: Authors

The year 1983 marks the beginning of microbrewing in South Africa with the establishment of Mitchell's Brewery in Knysna. Since 1983 structural changes and a new geography of craft beer production has emerged. Craft beer produc-

tion spread to different regions as many local beer consumers switched to the more artisanal, locally produced crafted beer products, which constituted an attractive alternative to conventional mass-produced beer products offered by multi-national brewers such as SABMiller. Figure 1 shows the growing number of craft microbreweries in South Africa, which rose from 9 in 1983 to as many as 187 by 2016.

As can be seen, the first two decades, including the end of apartheid and the democratic transition in 1994, were marked by only a small growth in numbers of breweries. In 2003 there were only nine microbreweries, mostly located in and around Cape Town and in Kwa-Zulu-Natal rather than in Gauteng, South Africa's economic heart and major market. From 2004 the growth gains momentum with new brewery establishments, mainly in Cape Town and elsewhere in the Western Cape. By 2008 the number of breweries had more than doubled to 25 microbreweries. The rate of expansion continued to increase between 2008 and 2013, when an additional 58 licensed microbreweries were established with an even higher growth rate of 70 percent. The peak period of growth was recorded between 2013 and 2016, as evidenced by the highest number of craft breweries in operation and the highest number of brewery closures (9.6% of the total). Most closures recorded between 2010–2016 were due either to an increasingly competitive environment or poor quality of beer products.

A major wave of craft breweries closures happened as a result of the COVID-19 pandemic. During 2020–2021 South Africa was subject to one of the world's most stringent lockdowns including curfews, stay-at-home orders and bans on sales of cigarettes and alcohol (Rogerson & Rogerson, 2020). At the start of the pandemic the government imposed a total ban on alcohol sales, which lasted from 27 March to 1 June 2020. With new COVID outbreaks, the ban was reinstated on 12 July and lifted on 17 August 2020. A third ban was introduced in December 2020 and lifted only February 2021; a fourth ban occurred between 28 June and 12 September 2021. The four alcohol bans lasted 160 days altogether, with devastating implications for craft beer producers.

Arguably, whereas South Africa's largest brewing enterprises had the strength to ride out the lockdowns imposed with COVID-19 the less well-capitalised and resourced smaller breweries faced serious challenges to their survival as small businesses. With no direct government relief to support these micro-brewers an estimated 30 percent of craft breweries (nearly 60) had to close down permanently in the period 2020–2021 (Corne, 2020; Zali, 2021). Because of the alcohol bans imposed in the period 2020–2021, the experience of the South African craft beer industry is markedly different from those observed in other parts of the world, particularly in countries in the Global North. As noted in one recent reflection on

South Africa's response to the pandemic, the alcohol bans "had spurious founda-tions" and resulted in considerable negative industry impacts which "on balance did more harm than good" (Parker, 2023, p. 49).

## 3.2. Structure and Spatial Distribution

Historically, the development of the craft beer industry in South Africa has been driven by the presence of a long existing and fairly large homebrewing commu-nity and of a small number of homebrewing clubs, most of which operate in the country's major cities. The most notable are the Wort Hog Brewers in Gauteng, South Yeasters in Cape Town and East Coast Brewers in Kwa-Zulu Natal and later arrivals such as Port Elizabeth Homebrewers Association, Sedibeng Home Brewers in Gauteng, Durban Homebrewers in Kwa-Zulu-Natal and Bloemfontein Home Brewing Club (Corne & Reyneke, 2013). Activities of these different homebrew-ing clubs have been described as the foundation for the incubation of several of the country's more recently established craft microbreweries. The reasons for en-trepreneurs establishing breweries have been examined by Rogerson & Collins (2019). The role of homebrewing clubs and the transition from a hobby to a small micro-brewery business enterprise was a common trajectory mentioned by the interviewees. It is a trend which resembles the development pathway of craft beer in the Global North.

> It was a transition from a hobby — yeah, I homebrewed for four years before I decided to start the Microbrewery… (Triggerfish Brewery).

> It was first hobby that turned into an obsession and now it's a business… (Sir Thomas Brewery).

> A hobby, completely — and I just decided to create a business out of a home brewing obsession which was about 5 years in the making (Mogravity Brewery).

Arguably, the craft beer economy of South Africa was created by numerous entrepreneurs with a passion for the product, for the industry and eagerness to tap into a niche market. The establishment of craft breweries in several township areas has resulted in a change in the racial complexion of craft brewery entrepreneurs with the former exclusive domination by White entrepreneurs now shifting with the beginnings of the entry of Black South African entrepreneurs into the craft beer industry. Above all, what emerges is that the craft beer section of South Africa is dominated by passionate entrepreneurs and many of those running micro-brewer-

ies out of lifestyle considerations. The following extracts include typical responses recorded during the interviews:

> To brew good beer it MUST be a passion! I am very passionate about brewing, it changed my whole life and I love every minute of it!! (Brauhaus am Damm).

> Lifestyle choice!!! I wouldn't change it for anything (Odyssey Craft Brewery).

> The Dog and Fig Brewery was established by a group of friends in 2008, as an expression of their passion for good company, good food and of course, great beer. The vision to establish a microbrewery with a difference started brewing as early as 2007 already then we realised the need to develop an exclusive market for unique beers which, like wine, can be savoured rather than quaffed. The target is to create custom-brewed couture beers and avoid the uniform taste of mass-produced products, hence the concept of extreme brewing. These beers are unfiltered, unpasteurised and made only with malted barley, hops and water. We also seek to educate people in the wide-ranging styles of beer, and therefore complement the brewing activities with structured beer-tasting evenings and attendance at various festivals (Dog and Fig Brewery).

Several different segments of enterprises can be differentiated within the South African craft beer industry. The first group includes informal homebrewers who generally brew experimental craft beers for personal satisfaction and often operate from home premises, which are known as 'garage breweries'. Homebrewing is essentially treated as a lifestyle choice or a hobbyist pursuit by this group; however, many homebrewers in South Africa strive to eventually establish a recognized microbrewery. In fact, many of the country's already well-established microbrewers evolved from homebrewing clubs. A typical South African example is the owner of 'The Cockpit Brewhouse' in Cullinan, who said: "Without the Wort Hogs I wouldn't have reached the point of brewing decent beer as quickly as I did" (Corne & Reyneke, 2013, p. 160). Under government regulations in South Africa individuals are allowed to produce home brewed beers in unlimited quantities for personal use without any permits or licenses. Such homebrews may only be given to family and friends as gifts because, according to national legislation, the brewing of beer or the making of wine and producing distilled spirits at home is only permitted 'for own use' and not for sale.

The second segment of the craft beer economy includes unlicensed microbreweries, which are in the process of obtaining their liquor licences and are on the verge of opening in the near distant future. This segment markets their craft-beer products at local craft beer festivals. The third main segment includes currently

licensed and well-established microbreweries; many of them have been in existence for some time, while others have only recently entered the market. In the study by Collins (2018), in which he interviewed representatives of microbreweries, 75 percent of them were associated with amenities such as restaurants, brewpubs, tasting rooms or conference facilities. In addition to the craft beers they produce, these amenities provide microbrewers with an alternative way to differentiate themselves on the market. By selling beer from own premises they gain an important advantage by not having to invest a great deal in distribution networks. This situation allows them to spend more money on overhead costs and brewing itself. These amenities also enable microbrewers to create an environment where consumers develop a connection with the craft brewery and can 'put a face on the product'.

Contract brewing is a sub-segment of the licensed industry (18 breweries in 2016). This type of craft brewing refers to an arrangement whereby a microbrewery produces its beer using another brewery's equipment. Under this arrangement the producer can either hire the services of the contract brewery's in-house brew master or brew beer on their own. This type of agreement is usually chosen when a newly created microbrewery is incapable of meeting the current demand or wants to launch a new brand of beer but does not have sufficient production capacity or space. A contract brewing company usually handles marketing, sales, and distribution of the producer's beer, while generally leaving the brewing and packaging to the producer (Collins, 2018).

The segmentation, organisation and development of South Africa's craft beer sector has been influenced substantially by government legislation. In April 2004 the Government Gazette promulgated the core legislation pertaining to the South African liquor industry, which refers to the Liquor Act, 2003 Act No 59. Applications for a licence enabling the micro-manufacture and sale of liquor for consumption both on and off the premises must be made at a Provincial Liquor Board. Such licences have to be obtained by microbrewers or other manufacturers of alcohol. The responsibility for regulating the liquor industry rests jointly with national and provincial governments. The requirements and types of licenses can differ from province to province. Other important factors are legislated, most importantly relating to property zoning. This usually requires the local municipality`s planning department or land use department to conduct an inspection and determine the suitability of the brewer's premises. In Gauteng zoning restrictions stipulate that licensed premises must not be within a 500-metre radius of places of worship or educational institutions.

Another important regulation is that all liquor licences must be renewed every twelve months. Should a liquor license holder fail to renew, the liquor license expires after a specified period. Once a liquor license has expired, a new liquor license

application must be submitted. The growth of the craft beer industry in South Africa has been supported by the establishment of industry associations. "Craft Beer South Africa" is one such association which lobbies on behalf of the industry. As defined by the National Liquor Act of 2003, craft breweries in South Africa are small businesses since micro-manufacture licenses are only granted to enterprises producing up to 100 million litres of beer per year (Liquor Act, No 59 of 2003, 2004). The majority of South Africa's craft brewers fall considerably below this threshold and occupy a space near the low end of micro-manufacturing (Steenkamp, 2016).

Turning to the spatial organisation of the industry Figure 2 provides an historical snapshot of the geography of craft beer production in South Africa in 2016, a baseline picture prior to the impact of the COVID-19 pandemic on the industry. While craft beer breweries at that time existed all over the country, most of the production was located in the Western Cape, Gauteng and KwaZulu-Natal provinces.
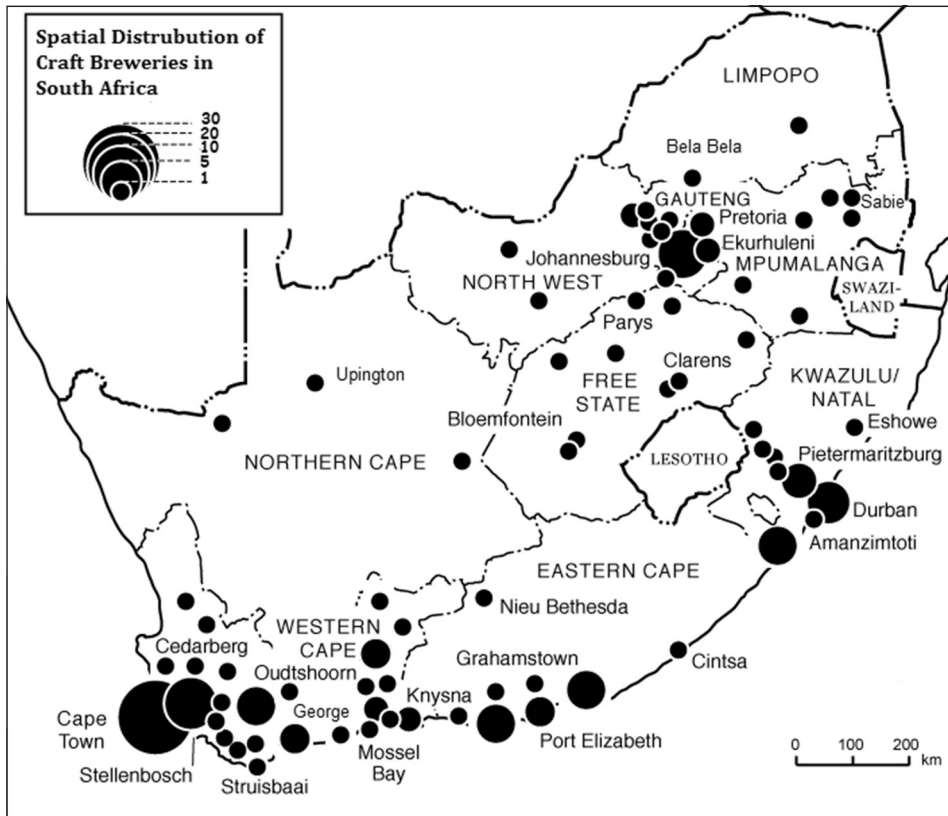


Figure 2. The location of craft breweries in South Africa, 2016.
Note: In 2018 the Kingdom of Swaziland was renamed as Eswatini and in 2021
the city of Port Elizabeth was renamed Gqeberha. Source: Authors

The largest clusters of microbreweries were situated in the metropolitan areas and major market centres of Cape Town, Johannesburg, Pretoria, Durban and Port Elizabeth. These five centres together were home to 66 microbreweries or 35 percent of the total in 2016. Within Johannesburg and Cape Town a trend was observed for the location of microbreweries in inner-city areas which are experiencing economic regeneration. The best examples are the areas of Woodstock and Salt River in Cape Town and in the inner-city of Johannesburg, most notably at the Maboneng Precinct. The entrepreneur who established the Smack! Republic Brewery in Maboneng said: "We were attracted to the urban rejuvenation taking place in the CBD (Maboneng), which seemed like a fitting backdrop to start Joburg's only microbrewery in the {inner} city". One notable change observed in the post-2016 period is the appearance of several craft breweries operating in the economically marginalised township spaces of South Africa's metropolitan areas, most notably in Soweto, which is part of metropolitan Johannesburg.

Beyond the major markets in the leading cities, microbreweries exist in significant leisure tourism destinations such as Stellenbosch, Knysna, Hermanus, and Mossel Bay (Steenkamp, 2016; Rogerson & Rogerson, 2020, 2021). In recent years craft breweries have gained recognition as a sub-set of small and medium-sized businesses which contribute to local economic development in South Africa (Rogerson, 2014). Indeed, in certain localities, most notably at Stellenbosch and Hermanus, craft beer is part of wider local offerings of gastronomic tourism (Rogerson & Rogerson, 2021).

## 3.3. Neo-localism

As mentioned earlier, the South African craft beer industry emerged as a supplier of products that constituted an alternative to mass-produced and popular beer types offered by large brewing enterprises and to the segment of sorghum-based beers. This countermovement has brought a diverse range of new and niche beer products to South African consumers.

Commenting on the growth of microbreweries in the USA, Flack (1997, p. 49) noted that much of the appeal of craft beer comes from the fact it is viewed as a rejection of the national culture "in favour of something more local". The long list of different styles of beer made by South African microbrewery producers includes, *inter alia*, English Bitter, Stout, American Blonde Ale, premium German style beer, Pumpkin Ale, Weissbier, American Red Ale, Golden Ale, Indian Pale Ale, Belgium Dubbel, Saison, Witbier, Light Lagers and what one interviewee described as a "Pilsner and a Porter all with a South African twist" (Nottingham Road Brewery). One craft beer entrepreneur described his beer style as "Left field, experimental and

artisanal" (Three Skulls Brew Works). Respondents from 53 microbrewers were asked to indicate how many different craft beer styles they currently produce. This information is shown in Figure 3.
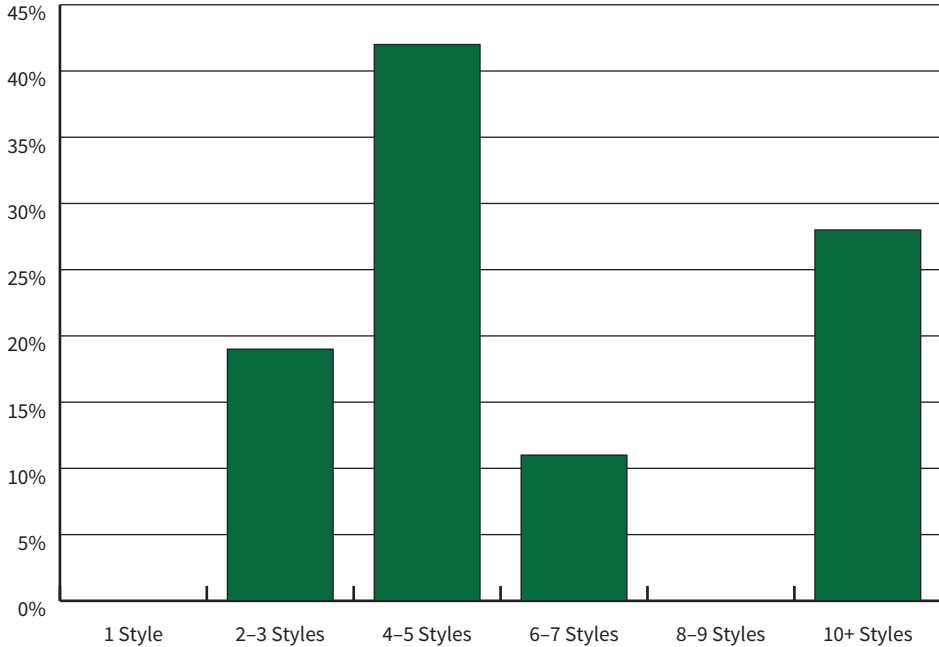


Figure 3. Different craft beer styles produced by microbreweries included in the sample
Source: Author interviews

The connections of microbreweries to local areas can be examined in a number of different ways. The first and most obvious is the brewery's location. Several interviewees said their microbreweries were located in places they regarded as home. This connection was most apparent in the case of microbreweries situated in small towns or on farms in rural areas. There were also a number of examples of entrepreneurs who chose to establish their brewery where they were living or had been born. This was the motivation for the location of the Darling Brewery, whose founder lives in Darling. Similarly, the place for establishing the Clarens brewery "was seen as best tourist village in South Africa and was born in the neighbouring village" (Clarens Brewery). Another example of a similar motivation was Dieks' Bru (De Rust, Western Cape), which the interviewee explained as follows: "Because my daughter lives here and I had planned a long time ago to establish a brewery on Route 62" (Dieks' Bru). In a few cases microbreweries were established in an already existing business location.

Well the farm initially had a winery — so the craft brewery simply became an extension… (Wild Clover Microbrewery).

Yeah well it's a family farm [Winery] and we built a new cellar which was standing empty and we were looking for something to do there. And my brother worked for SAB for about three or four years and was part of the launch for Carlsberg and Corona and when he returned to the farm he started experimenting with beer brewing and then decided to turn that cellar into a microbrewery — so it was sort of an existing building that worked… (Wild Beast Brewery).

There are also examples of microbreweries located in large urban areas because their founders were emotionally attached to these places. One of them is the Odyssey Craft Brewery. During the interview, its owner said: "I have lived in Durban for most of my life so I call it home and by default it seemed a good choice to start up for this reason. I also looked around… There are no craft breweries in Durban itself. Sure, there are a few in Shongweni and Hillcrest but nothing actually in Durban. I thought this was a good business opportunity" (Odyssey Craft Brewery). Another example is the Devils Peak Brewery in Cape Town: "We started out in Somerset West but it became a logistical hurdle that we had to overcome, but the idea was always to be centred in Cape Town and therefore being close to 'Devils Peak' now — we have these whole genus loci that we follow and it creates a sense of place and hence all our beer labels are relevant to 'Devils Peak'…" (Devils Peak Brewery).

Local embeddedness of microbreweries can also manifest itself by the extent to which they depend on local markets to sell their products, which in this analysis were defined as being within 50 km from the location of the microbrewery. For all the 53 microbreweries, sales within the local area accounted for at least 75% of total sales. For half of the sampled entities, this proportion was at least 80%. In tourist areas of South Africa, the share of local sales was boosted by purchases made by tourists who were looking for 'local' flavours. While these findings are not surprising, it can be argued that they are not necessarily evidence of the importance of the 'local' to craft beer producers. More insights into the relative or absolute importance of local markets were obtained from several interviews. In the owner of Diek's Bru situated in De Rust, said that "most of my beers are sold within 50 km". The owner of the Darling Brewery, one of the country's more established microbreweries, also recognised the relative importance of the local market saying that "it is not big but crucial as it was started here" (Darling Brew).

Another dimension of 'being local' has to do with the origin of ingredients used in beer production. According to the interviewees, a large part of the ingredients required to make craft beer, such as base and speciality malts, hops and barley, are sourced through SABMiller. As regards other ingredients, most breweries obtain speciality products from foreign suppliers. As is the case with craft beer production in other parts of the world, it was found that only a small proportion of inputs were actually sourced locally, most importantly water, which was obtained from boreholes, streams or local lakes. The limited use of distinctive local ingredients by the South African craft beer industry can perhaps be explained by the fact it is relatively young in comparison with its counterpart in the USA. Local connections and embeddedness of many microbreweries were also evidenced by their relationships with the wider community. In a number of cases microbreweries were sponsors of not only local beer festivals but also other local events, such as trail runs or local art shows.

In the USA, among the strongest manifestations of neo-localism were efforts made by craft beer producers to link their products to the local area through naming, branding and imaging. Schnell and Rees (2003) and Fletchall (2016) both highlight the importance of imagery as a means to promote local ties. In their studies they examine images on labels, beer names and promotional materials and the extent to which they reflect the principles of neo-localism. Schnell (2013) stresses that a major attraction of breweries is the exclusive nature of their products, which are marketed as beers that cannot be found elsewhere and are tied to a unique place. These breweries are often proudly and self-consciously local. According to Schnell (2013), they actively promote their craft beers by using idiosyncratic beer names and imagery. Schnell argues that in many respects microbreweries market "place" as much as they market beer and that they "actively seek out distinctly local imagery, local landscapes and local stories to position themselves as intrinsically rooted in place" (Schnell, 2013, p. 57).

The role of naming, branding and imaging was also explored during the interviews. The entrepreneurs were asked to explain the reasons for choosing particular names of their microbreweries and their craft beers and whether these names were in any way connected with the area where the brewery is located. The findings revealed almost an equal split between breweries where names and imagery were not linked to the local area and those which employed them as a deliberate strategy to sell the "local" connection. Typical of microbreweries that did not rely on place attachment when choosing their own names and those of their brands was the Odyssey Craft Brewery. As its owner explained: "The brewery is called Odyssey Craft Brewery, and chose it because what is an odyssey? It is a journey, an adventure, an experience… We want to take people on a journey through beer".

The Cockpit Brewhouse, situated at Cullinan, was named to reflect its owner's passion for aviation.

At least one-third of entrepreneurs chose to name their breweries and their craft beers to convey the sense of place attachment. The Chameleon Brewhouse at Hartbeespoort in North West Province as well as its brews are named after the local craft market. In a similar fashion the microbrewery in the Eastern Cape small town of Nieu Bethesda — the Sneeuberg microbrewery — is named after the nearby mountain range. Another example of place attachment in the naming is the Clarens Brewery situated in the Clarens village square and producing Clarens Blonde ale, which is a variation of the American blonde ale type of beer. The Nottingham Road Brewery, situated in the KwaZulu-Natal Midlands, was also named after the place where it is located. In the case of Karusa Premium Wines & Craft Brewery, situated just outside of Oudtshoorn in the Western Cape, the origin of the name was explained as follows: "Karusa is the original word that the Karoo was named by according to the Khoi San meaning "land with little water" or "thirstland". Figure 4 shows one more example of choosing a name with a local relevance.



Figure 4: Devils Peak Brewery. "The brewery's name was chosen because Devils Peak is an iconic landmark in Cape Town number one and number two it has that mythical element to it, the intriguing devil character — so a little bit on the naughty side", so all our names are very entrenched in Cape Town and Devils Peak. Our Beer Names & Labels: 'The Kings Blockhouse — which is a historical fort on 'Devils Peak' and is observable from our location" (Devils Peak Brewery).
Source: K. Collins

The name of the Red Sky microbrewery at Gordon's Bay "is derived from our Stellenbosch night skies… the Simonsberg turns a deep purple/red in the summer evenings, the best way to observe them… sitting on your veranda with an ice cold beer". The owner of the Copper Lake Breweries explained the origin of the name as follows: "Copper Lake represents the characteristics of the brewery's location and appearance… I have a copper coloured lake on my property". Corne & Reyneke (2013) report the case of craft beer labels featuring local paintings produced by the entrepreneur's daughter, a well-established artist. Another brewery included in the sample, the Saggy Stone brewery, was established by a former geography teacher, who used the name given by his daughter to a landmark situated near Robertson where the brewery is located: "We had built a stone lapa but with very badly built gabions in our kloof. The baboons sat on the walls and they partially collapsed. Our young daughter (12 years) called it Saggy Stone and then when we started building the brewpub out of river boulders she commented that it was just like Saggy Stone lapa!" (Saggy Stone Brewery).

Place attachment is also evident in the name of Darling Brew, which is a small town in the Western Cape, although beers produced by the brewery are named after endangered South African animals including the geometric tortoise (Slow-beer), the loggerhead turtle (Native ale) and the spotted hyena (Bone crusher). At the Honingklip brewery in Western Cape, beer brands include Onrus, a suburb in the nearby town of Hermanus. Steenkamp (2016, p. 24) reports that brewer names from the Stellenbosch area of the Cape Winelands included reference "to the historical route wagons used to take, fetching fresh produce in the Boland in order to refresh the harbour in Cape Town". Finally, Gregory (2016) reported evidence of neo-localism and place attachment in the naming of beers produced by the Smack Republic Brewery (formerly) situated in the Maboneng precinct of the inner city of Johannesburg. This brewery produces a range of different brands of craft beers, all of which reflect a deliberate attempt to make local connections. During the interview its owner said: "We offer three types of craft beer… all of which are idiosyncratic of the famous areas within the inner city of Joburg. One beer is named the 'Maboneng Maverick'….and this is because we are located in the Maboneng building, which is one of the oldest buildings in Johannesburg and has hundreds of years of history attached to it, therefore the urban setting and rich cultural history give us a bold but fresh appeal to our brewery and beers". Other craft beers produced by the Smack Republic Brewing Company were given names connected with stories about the surrounding inner city such as the Braamfontein Brawler and the Bree Street Belle.

As evidenced by the above quotes from the interviews, the development of the craft micro-brewery industry in South Africa includes elements of neo-localism.

Many breweries have based their marketing strategies on neo-localism while others have not sought to capitalize on it. Local connectedness and embeddedness is reflected most strongly in the choice of places where microbreweries are established, in names given to microbreweries and craft beer products as well as images used on labels, all of which emphasize uniqueness and local identity.

## 4. Conclusion

The growth of craft beer as a global revolution transforming the landscape of production and consumption in the brewing sector is now well-documented (Garavaglia & Swinnen, 2017a, 2017b; Kline et al., 2017; Slocum, Klein & Cavaliere, 2018; Durán-Sánchez et al., 2022; Cabras et al., 2023). The phenomenon of craft beer has been intertwined with wider counter-movements to globalization and with the concept of neo-localism. Most research on craft beer concerns countries of the Global North. This article offers insights into the development of the craft beer industry in the Global South and the role played by neo-localism. Starting from the first decade of the 21st century, a new segment of the beer economy has emerged in South Africa, which is dominated by passionate entrepreneurs engaged in small batch craft beer production. The rise of this new industry has led to the growing popularity of craft beer tourism, an important driver of local economic development especially in small town South Africa (Rogerson, 2016; Rogerson & Rogerson, 2021).

The historical development of the South African craft beer industry is in many respects similar to that observed in countries of the Global North. Similarities include consumer reactions to the dominance of monopoly brewing enterprises and their standard beer products, the home-brewing movement, the appearance of a cohort of passionate craft beer entrepreneurs and the role played by neo-localism in shaping the landscape of the South African craft beer industry. Differences include the delayed rise of the craft beer sector in South Africa, business owners' decisions to set up their microbreweries in the former (exclusively) Black township areas and the resulting (minor) shift in the racial composition of craft beer entrepreneurs. Another distinctive feature of the South African experience is how hard the country's craft beer sector was hit by the government's pandemic measures, particularly the strict bans on the sale of all forms of alcohol.

One important direction of future research for tourism and recreation scholars is to track changes caused by the devastating impacts of the pandemic and to analyse the industry's adaptive strategies, its ability to recover and its degree of re-

silence. Moreover, since the pandemic has strengthened the role of domestic tourism in South Africa, another aspect worth investigating is whether neo-localism continues to be equally important for craft beer entrepreneurs and the changing directions of the South African craft beer industry.

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## Ewolucja branży piw rzemieślniczych na globalnym Południu: doświadczenia Republiki Południowej Afryki

**Streszczenie.** W związku z globalnym wzrostem produkcji i konsumpcji piwa rzemieślniczego pojawiło się wiele badań prowadzonych w wielu dziedzinach. Jedną z głównych koncepcji wyjaśniających rosnącą popularność piwa rzemieślniczego w krajach globalnej Północy jest neolokalizm, czyli powiązanie produktu z lokalną tradycją i miejscem jego wytworzenia. W artykule przeanalizowano przypadek RPA jako kraju globalnego Południa, w którym nastąpił rozkwit kultury piwa rzemieślniczego i pojawienie się gospodarki z nim związanej. Autorzy omawiają rozwój historyczny, cechy strukturalne i organizację przestrzenną branży piwa rzemieślniczego w RPA, a także wskazują, w jaki sposób przejawia się w niej neolokalizm. Analiza ma na celu identyfikację podobieństw i różnic między rozwojem kultury piwa rzemieślniczego na globalnym Południu a jej opisami w istniejącej literaturze, która koncentruje się na krajach globalnej Północy.

**Słowa kluczowe:** piwo rzemieślnicze, Afryka Południowa, neolokalizm, turystyka związana z piwami rzemieślniczymi

**REGIS MUSAVENGANE[a], WALTER MUSAKWA[b]**

# Climate Change Impacts on Wildlife Protected Areas in Southern Africa: a Bibliometric Analysis

**Abstract.** The article examines how climate change has impacted wildlife-protected areas in Southern Africa in the context of tourism development. Protected areas are known as preferred destinations for nature-loving tourists. Using a systematic review and bibliometric analysis the authors identify symptoms of climate change in Southern Africa's wildlife-protected areas and adaptation strategies for resilient destinations. Some of the key effects of climate change identified in the analysis include species reduction, human-wildlife conflicts, habitat quality and infrastructure modification and social impacts. The authors establish at what levels changing climatic conditions in protected areas affect conservation and tourism processes in protected areas thus contributing to the body of knowledge on wildlife-human interactions, survival strategies of community members and interactions between community members and conservation organizations. The synthesized data can be used in future studies to focus on climate-proofing protected areas and surrounding communities, can help social enterprises and conservation groups to improve community resilience against climate change and inform conservation ecosystem-based adaptation strategies.

## 1. Introduction

Climate change and climate variability are imminent threats to the existence of nature and associated wildlife, tourism sites and community livelihoods (Chikodzi et al., 2022; Dube & Nhamo, 2020a). Studies show that the growth and development of tourism will continue to be hampered by the persisting climate change (Deason et al., 2022). Given the extent to which the tourism sector affects livelihoods, the

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effects of climate change cannot be ignored. The World Meteorological Organisation (WMO, 2022, p. 4) notes that "changes to the global climate are undermining the global ability to achieve sustainable development, directly impacting Sustainable Development Goals 1, 2, 3, 6, 7, 10, 13, 14 and 15". Rural economic development, especially in Africa, has been facilitated by the establishment of protected areas (PAS), which have helped to improve livelihoods of surrounding communities through the creation of employment and small business opportunities (Musavengane & Kloppers, 2020; Shereni & Saarinen, 2021).

An understanding of climate change at the local level enables PA managers and local communities to climate-proof PAS. The findings of this study will further help PAS to develop ecosystem-based adaptations (EbA), community-based adaptations (CbA), indigenous-based adaptations (IbA) and ecosystem-based disaster risk reduction (Eco-DRR) strategies. It is therefore essential to rely on collaboration and research in order to develop effective response measures to climate change (UNFCC, 2022). This explains calls to net zero future as alluded to in COP26 in Glasgow when the World Travel and Tourism Council "launched the first ever sector-wide Net Zero Roadmap for Travel & Tourism. The 'Roadmap' was developed jointly with the United Nations Environment Programme (UNEP) and [professional services and consulting company] Accenture, and was endorsed by the United Nations Framework Convention on Climate Change (UNFCCC)" (World Travel and Tourism Council, 2022, p. 22). The establishment of such a roadmap points to the relevance of the tourism sector in formulating and adopting climate response measures.

There are various studies on protected areas and climate change but there is little literature that examines climate impacts in protected areas and their effects on tourism in Southern Africa. Existing studies focus on the micro-level by analyzing individual cases. For example, Mushawemhuka et al. (2018) demonstrated the effects of increasing temperatures in Zimbabwe's Hwange National Park and called for well-ventilated and air-conditioned guest rooms and rehabilitation of the damaged terrain for easy access. Similarly, Kilungu et al. (2017) reported that fauna migration patterns have been altered by changing climatic conditions at the Serengeti National Park in Tanzania.

Therefore the purpose of the following study is to provide a systematic review of studies that examine impacts of climate change in Southern African PAS to enhance tourism development and livelihoods of communities that depend on tourism. The study contributes to the ongoing discussion about climate change mitigation and adaptation measures that are required to facilitate conservation and tourism development in PAS. Despite calls by governments and NGOs, there have not been that specifically investigate impacts of climate change that are unique to PAS (Dube et al., 2022).

## 2.  Literature Review

According to WTTC (2022 p. 4), before the COVID-19 pandemic the tourism sector created 333 million direct and indirect jobs and contributed about US$9.6 trillion to the global GDP (10.3%). The relevance of the tourism sector in global development discourse in the context of climate mitigation is evidenced in the Millennium Development Goals (MDGs) for 2015 and the 2030 UN Sustainable Development Goals (Siakwah et al., 2020). During the pandemic, protected areas were the most preferred destinations for tourists because of their uncontaminated environments (Gabriel-Campos et al., 2021). However, protected areas are increasingly affected by climate change impacts.

In addition to being safe havens for biodiversity, protected areas provide extrinsic value to human livelihoods (Buckley et al., 2019). Tourism is regarded as a management tool for successful conservation in protected areas (Dudley, 2008). Tourism in PAs can contribute to biodiversity conservation through raising awareness and nature investment (Leung et al., 2018). As pointed out by Harris et al. (2021), PAs provide health benefits to tourists, in particular those suffering from stress, depression and lack of happiness. However, as Zhong et al. (2020) and Snyman (2012) note, if mismanaged, tourism can lead to socioeconomic and environmental challenges, such as social conflict and biodiversity loss. At the same time, tourism production and consumption can be disturbed by exogenous factors, such as climate change (Chikodzi et al., 2022). Consequently, what is required are sustainable tourism approaches that strike a balance between the needs of the economy, society and the environment (Hall et al., 2015). For example, Zhang et al. (2022, p. 1) reported that the sustainability of the Qinghai Lake Nature Reserve in China is "intermediate, with the sustainability of its social system being better than that of the environmental system".

Ndlovu, Matipano and Miliyasi (2021) argued that the effectiveness of conserving diversity will continue to be challenged by a myriad of factors, chief amongst them climate change, pandemics, political instability and global economic recessions. Similarly, Brashares et al. (2011) pointed out that during upheavals, local people who reside in communities located in the vicinity of PAs in tropical ecosystems tend to revert to illegal wildlife harvesting and fishing, which becomes the immediate resilient *modus operandi* and is used to hedge against economic challenges.

Protected areas also play an important role in Southern Africa, which is well documented. For example, national parks in the region attract a lot of foreign tourists interested in trophy hunting and photographic tourism (Lindsey et al., 2020). PAs are also supported by the global donor community (Lindsey et al., 2020).

Like other parts of the world, natural resources for outdoor tourism in Southern African are seriously threatened by climate variability and change (Dube & Nhamo, 2020b). Some parts of the region are experiencing heatwaves, droughts and floods due to climate change (Nhamo & Chapungu, 2021). These effects of climatic changes have affected tourism operations across all tourism sub-sectors (Thuiller et al., 2006). Cyclone Freddy and Cyclone Idai are the latest devastating phenomena that struck Southern Africa. It is therefore not surprising that the problem of climate change has been the subject of much research. A search of scholarship databases, conducted in November 2022, for the keywords 'climate change and tourism' returned 1,860,000 documents on Google Scholar, 731 in the Annals Journal of Tourism, 1033 in the Tourism Management Journal and 597 in the Journal of Travel Research. A search for 'climate change, tourism, protected areas and Africa' yielded 17,300, 77, 89 and 62 results, respectively.

## 3. Materials and Methods

### 3.1. Bibliometric Analysis

Published studies investigating the impact of climate change on tourism in PAS were obtained from the Clarivate Web of Science (WoS) Core collection. The WoS database is a verifiable source of high-quality, standardized, inclusive and reliable academic information (Li et al., 2010). The data were collected on November 7, 2022, using the WoS search engine. Data query was directed to 'All fields', i.e. the publication title, author details, abstract content, keywords, affiliations and full content. The first search string — 'Protected Areas AND Climate change AND Tourism' — yielded 429 documents. Since the study was only interested in Southern Africa, filters per region/country were applied. The database included 40 documents referring to all Southern African countries: South Africa (22), Zimbabwe (4), Botswana (5), Namibia (2), Mozambique (1), Malawi (1) and Tanzania (5). The second search on all fields — 'Parks, climate change and tourism' returned 549 documents, of which 73 related to Southern Africa: South Africa (56), Botswana (9), Zimbabwe (2), Namibia (3), Malawi (1), Mozambique (1) and Zambia (1). Only articles published in English were taken into consideration.

After excluding documents that did not feature all three themes, i.e. climate change, tourism and protected areas/parks, only 47 publications remained, six of which were duplicates. The purpose of the final selection was to identify articles

that analyze climate change impacts in Pas. There were 28 such articles, which were read in full to identify specific topics and common themes.

A plain text file of each article was saved to enable bibliometric analysis. The files were processed using the vosviewer software (version 1.6.18) to enable the graphic presentation of bibliometric results.

## 3.2. Data Analysis

To showcase the impact of climate change in Southern Africa, the prisma method (Preferred Reporting Items for Systematic Reviews and Meta-Analyses) was employed. prisma improves transparency of systematic reviews by (i) identifying relevant articles, (ii) screening based on the area of focus, (iii) ensuring eligibility (Shamseer et al., 2015; Mkhongi & Walter, 2022). Themes present in the articles (Table 1) were derived deductively.

Table 1. List of articles included in the study

| # | Author | Country/Region of study |
|---|---|---|
| 1 | Coldrey & Turpie (2020) | South Africa |
| 2 | Melville et al. (2021) | South Africa |
| 3 | Jamaliah et al. (2021) | South Africa |
| 4 | John et.al. (2020) | Tanzania |
| 5 | Kija et al. (2020) | Tanzania |
| 6 | Musakwa et al. (2020) | Zimbabwe |
| 7 | Searle et al. (2022) | Botswana and Zimbabwe |
| 8 | Botha et al. (2021) | Tanzania |
| 9 | Santangeli et al. (2018) | Namibia |
| 10 | Egoh et al. (2012) | Africa |
| 11 | Mudzengi et al. (2021) | Zimbabwe |
| 12 | Utete (2020) | Zimbabwe |
| 13 | Lindsey et al. (2013) | Namibia |
| 14 | Bennitt et al. (2019) | Botswana |
| 15 | Sianga & Fynn (2017) | Botswana |
| 16 | Dube & Nhamo (2020b) | South Africa |
| 17 | Mushawemhuka, Rogerson & Saarinen. (2018) | Zimbabwe |
| 18 | Mushawemhuka, Fitchett & Hoogendoorn | Zimbabwe |
| 19 | Kilungu et al. (2019) | Tanzania |
| 20 | Lwoga & Asubisye (2018) | Tanzania |
| 21 | Coldrey et al. (2022) | South Africa |

| # | Author | Country/Region of study |
|---|--------|------------------------|
| 22 | Mabibibi et al. (2021) | South Africa |
| 23 | Smith & Fitchett (2020) | South Africa |
| 24 | Mathivha et al. (2017) | South Africa |
| 25 | Humphrey et al. (2022) | Namibia |
| 26 | Botha et al. (2021) | Tanzania |
| 27 | Pant et al. (2020) | Africa |
| 28 | Kosamu et al. (2012) | Malawi |

Source: Authors

# 4. Results and Discussions

## 4.1. Network Visualization

A total of 1209 keywords associated with the impact of climate change on protected areas in Southern Africa were identified in the articles, of which 48 were found to occur at least five times. Figure 1 shows links between climate change, tourism and conservation in protected area. . The strength of links between these keywords was auto-calculated by vosviewer based on the number links. "The strength of a link is an attribute of a link represented by a positive numerical value. The higher the value, the stronger the link" (Mkhongi & Musakwa, 2022, p. 238). Table 2 shows 15 keywords with the greatest link strength.

Table 2. Occurrences of keywords and the strength of links between them

| # | Keyword | Occurrences | Total link strength |
|---|---------|-------------|---------------------|
| 1 | Climate change | 48 | 81 |
| 2 | Conservation | 38 | 67 |
| 3 | Climate change | 30 | 60 |
| 4 | Protected areas | 27 | 52 |
| 5 | Adaptation | 16 | 45 |
| 6 | Vulnerability | 18 | 45 |
| 7 | Management | 23 | 44 |
| 8 | Impacts | 15 | 38 |
| 9 | National parks | 13 | 35 |
| 10 | Perceptions | 11 | 35 |
| 11 | Tourism | 11 | 35 |
| 12 | Biodiversity | 17 | 32 |

| # | Keyword | Occurrences | Total link strength |
|---|---------|-------------|---------------------|
| 13 | Africa | 12 | 31 |
| 14 | Patterns | 14 | 20 |
| 15 | Impact | 12 | 18 |

Source: Authors

Based on these 15 keywords, the vosviewer system categorised them into four clusters, each marked by a different colour. A cluster is a group of related keywords associated with a common theme. The bigger the cluster, the greater the strength of the keywords (Figure 1).



Figure 1. A network of links between keywords appearing in the articles examining the impact of climate change on protected areas in Southern Africa; colours denote clusters of closely related keywords.
Source: Authors

**The big blue cluster** (*climate change and sustainability of protected areas*) contains 14 items: Botswana, classification, climate change-community, dynamics, ecotourism, impacts, management, national park, Okavango delta, perceptions, sustainability, wildlife and wildlife conservation. All these items refer to the sustainability of pas, which can be achieved through actions that can climate-proof wildlife and communities. For example, positive attitudes of community members to the environment can reduce the anthropogenic causes of climate change. The effects of climate change can also be mitigated by promoting ecotourism and ecosystem adaptation (EbA) measures introduced by pas and surrounding communities.

The **red cluster** (*climate change and species diversification*) contains 14 items: biodiversity, climate, diversity, forest, impact, Kilimanjaro, knowledge, patterns, rainfall, savanna, Southern Africa, species richness, variability, and vegetation. The items in this cluster point out that rainfall patterns affect species diversity in PAs. Weather and climate variability continue to shock PAs ecosystems and threaten the survival of other fauna and flora. The depletion of some species is having a negative impact on biodiversity in PAs. On the positive side, large forest areas in Southern African PAs have a great capacity for carbon sequestration. However, the richness and diversity of these forests heavily depend on favourable climatic factors.

The **small blue cluster** (*climate change adaptation and resilience of PAs and local communities*) contains 11 items: adaptation, Africa, climate change, model, precipitation, resilience, South Africa, Tanzania, temperature, tourism and vulnerability. The items in this cluster point to the need for sustainable climate adaptation models in PAs to climate-proof them. Climate change knows no boundary; even PAs considered to be strong are weakened while the already vulnerable wildlife and people are faced with the prospect of elimination by the law of nature. Climate-proofing vulnerable communities and wildlife in PAs is essential in the ever-warming environments associated with erratic precipitation.
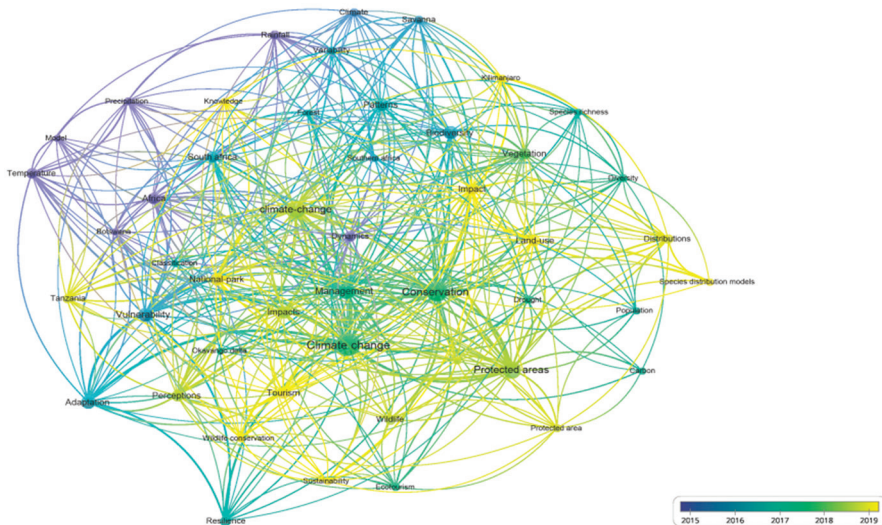


Figure 2. A 5-year trend in research concerning climate change on protected areas in Southern Africa
Source: Authors

The **yellow cluster** (*climate change impacts on land*) contains 9 items: carbon, conservation, distributions, drought, land use, population, protected areas and

species distribution models. These items show the relationship between space and species enrichment during climate change. Wildlife populations are greatly affected when climatic shocks and stressors, such as droughts, happen in their habitats. This leads to species depletion in PAs.

The past, current and emerging themes associated with the impacts of climate change on protected areas are shown in Figure 2, where different colours represent the publication year of articles in which the keywords appeared. Awareness of all these themes should help PA managers and researchers in developing solutions and strategies to counteract the impacts of climate change.

## 4.2.  PRISMA and Meta-analyses of Climate Change Impacts on Protected Areas

To support the data shown in Figure 1, the following section provides a closer look at data obtained from articles listed in Table 1.

### 4.3.  A Fall in Occupancy of Accommodation Establishments and Tourist Visits

There is an agreement among the studies that the continual increase in temperatures threatens the visitation of PAs. In their modelling study, Coldrey and Turpie (2020) reported a correlation between occupancy of tourist accommodation establishments and rainfall. The study revealed that growing temperatures discourage visitors from visiting South Africa's national parks. According to Mushawemhuka et al. (2018), climate change was the main cause of the decline in the number of visitors at national parks in Zimbabwe. Based on their models, Coldrey and Turpie (2020) made an astounding prediction that visitation at most South African national parks will decline by 2050. In preparation for such scenarios, it is necessary to develop adaptive and resilience strategies to mitigate the effects that could lead to the loss of tourists at the PAs. Jamaliah et al. (2021) argue for the need to implement technical measures such as earth dams to store water for agriculture and animals. Other proposed measures include the use of rainwater harvesting techniques, solar systems and natural light at hotel facilities in the PAs (Mushawemhuka et al., 2022).

Mudzengi et al. (2021) reported that trophy hunting in Zimbabwe was directly affected by climate change thereby negatively impacting the livelihoods of local communities. Lindsey et al. (2013) projected that wildlife would continue to have a high economic value compared to livestock during challenging climate change periods characterised by environments with more climate stressors.

### 4.4.  Decline in Species Ddiversity and Species' Adaptation

Climate change influences many species in protected areas. Megafauna are particularly susceptible to climate change because of their weak genetic capacity to adapt to changing environments (Melville et al., 2021). John et al. (2020) predict that approximately 70% of forests (thickets) in Tanzania will have disappeared by 2085. This will be exacerbated by a high demand for biofuels. Owing to poor pollination and seed dispersal, forest fragmentation will further negatively affect riparian zones, which are essential for the movement of wildlife. This is particularly important for PAs, which depend on wildlife corridors.

Melville et al. (2021) point out that animals move from one place to another in search of food. Bennitt et al. (2019) note that buffer zones help wildlife to adapt to climate change. In their study, the authors observed that non-selective grazers, such as buffalo, moved from floodplains to riparian woodlands. John et al. (2020) argue that fauna's natural resilience to climate change is strengthened by forest connectivity. However, when megafauna moves to locations with water they tend to destroy important ecosystems characterised by a high capacity for carbon sequestration, such as mopane and acacia woodlands (Musakwa et al., 2020). To counteract the effects of climate, it is often necessary to implement intervention measures; Bennitt et al. (2019) mention the example of Sabie Game Reserve in South Africa, where hippopotami (*Hippopotamus amphibious*) were relocated because of drought to preserve them.

### 4.5.  Human-wildlife Conflicts

Owing to dwindling habitats and declining resources as a result of climate change, conflicts between humans and wildlife are becoming more frequent. For example, in Botswana, predators and other species of megafauna, like buffalo and elephants, have expanded their ranges closer to human settlements due to flooding (Bennitt et al., 2019). Similar incidents of wildlife encroachment in human spaces due to climate-induced exogenous factors are also reported in Zimbabwe (Mushawemhuka et al., 2018). To mitigate human-wildlife conflicts during drought Gonarezhou Conservation Trust (GCT) in Zimbabwe allows local communities to access some common natural resources in the park, i.e. grass for livestock (Musakwa et al., 2020). The GCT also permits local communities to harvest natural vegetables, i.e. pigweed/mowa (*Amaranthus retroflexus*). Such practices are important in building good relations between PAs and locals, who can see themselves as co-owners of these resources. Nevertheless, Musakwa et al. (2020) reported that poaching activities tend to increase as a result of the abandonment of agricultural activities by smallholder farmers residing closer to PAs. Botha et al. (2021) agree that a shortage of resources, particularly water, threatens the communities' food supply.

Consequently, Tanzanian communities near Ngorongoro Crater prefer to breed sheep rather than cattle and goats as sheep require less feeding.

### 4.6. Habitat Quality and Infrastructure Deterioration

Climate change alters habitats and damages infrastructure in communities. Water reserves (i.e. dams) are directly affected by climate change. Utete (2020) reported that climate change reduces the availability of potable water in Zimbabwe, thereby threatening biodiversity. Furthermore, climate change is also altering water systems in PAs as a result of changing soil nutrient content and other factors (Mudzengi et al., 2021). According to Musakwa et al. (2020), the shortage of water for wildlife consumption in PAs is exacerbated by the need to maintain natural ecosystems. In an effort to preserve self-regulated ecosystems, the Gonarezhou National Park was against building artificial pans but has decided to allow the artificial pumping of water for animals. Pant et al. (2020) observed that as a result of climate change wetlands in PAs have dried up causing rhinoceros to lose their habitat. At Sabi Game Reserve in South Africa, which was affected by drought, there was a case of an elephant digging up water pipes to get to water the incurring of repair costs (Smith & Fitchett, 2020).

The pressures exerted on natural systems due to ecological changes are enormous. Some of these changes identified by Coldrey et al. (2022) include habitat change, resource pressure, infrastructure at risk and reduction in tourism demand. Furthermore, studies have shown that because of climate change activities of local communities have a direct impact on wildlife. For instance, stream bank cultivation undertaken by communities around Gonarezhou National Park is leading to soil erosion, which disrupts aquatic systems (Musakwa et al., 2020). Changing climatic elements are also causing a decline in ecosystem quality of Tanzania's Greater Serengeti (Kija et al., 2020). Santangeli et al. (2018), who studied the effects of climate-driven environmental variation and land-use on body condition of vulture nestlings in savannah landscapes emphasised the need to assist local communities in conservation projects that directly influence their livelihoods to sustain the protected areas. Similarly, Mabibibi et al. (2022) report projects undertaken around Kruger National Park (KNP) to prevent the extinction of some tree species because of drought, which involve planting indigenous trees around the park to preserve biodiversity and facilitate carbon sequestration.

Droughts, apart from causing water shortages, lead to the spread of diseases in PAs. Dube and Nhamo (2020a) reported that due to extreme temperatures experienced between 2014 and 2017, the population of rodents increased in the KNP. This resulted in the death of two elephants from the encephalomyocarditis virus spread by rodents. Similarly, laughing doves were affected by a *paramyxovirus* spread by

pigeons whose populations increased due to climatic changes, thereby negatively affecting avitourism (bird watching) (Dube et al., 2022).

### 4.7. Climate Change Social Impacts in and around PAs

The discussion so far has highlighted several negative challenges of climate change in and around PAs. Nevertheless, climate change has also positive effects on PAs and their surroundings. For example, Lwoga and Asubisye (2018) found that drought in Tanzania led to greater unity among community groups, which started to cooperate with a view to finding climate change adaptation measures. Similarly, Kilungu et al. (2019) found out that as a result of increasing temperatures mountain sickness, landslides and rock falls were significantly reduced in and nearby Mt Kilimanjaro in Tanzania. In addition, new vegetation and flowers grew at the feet of Mt Kilimanjaro, creating beautiful scenery for tourists. As a result of changes in land cover, sightseeing opportunities were improved, particularly, the waterfall. Since the snow is slowly disappearing, there is a new trend for 'last chance tourism' associated with viewing ice in Mt Kilimanjaro. Last chance tourism is referred to as travelling to a destination before it 'disappears' (D'Souza et al., 2023).

## 5. Conclusion

The purpose of the study was to identify the impacts of climate change on protected areas in Southern Africa in the context of conservation and tourism. The studies reviewed in the article report various adaptation measures that can be adopted by communities living around PAs as well as those already implemented by conservation authorities. The main themes identified in the analysis include a decline in the number of species, human-wildlife conflicts, habitat quality and infrastructure deterioration and social impacts of climate change.

### Study limitations and future study recommendations

The study was only based on studies indexed in the Web of Science, which means it did not include other, potentially useful findings from other publications.

The study did not include quantitative analysis, which can be used in future research to triangulate qualitative findings.

The study focused Southern Africa and not did not include all countries in this region owing to article availability on the Web of Science.

The authors recommend future studies that focus on climate adaptation meas-

ures promoting sustainable conservation within PAs and surrounding communities. These may include approaches involving ecosystem-based adaptations (EbA), indigenous-based adaptations (IbA) and community-based adaptations (CbA).

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## Wpływ zmian klimatycznych na obszary chronione w Afryce Południowej: analiza bibliometryczna

**Streszczenie.** Celem artykułu jest przegląd badań dotyczących wpływu zmian klimatycznych na obszary chronione w Afryce Południowej w kontekście rozwoju turystyki. Obszary chronione są preferowanymi celami wyjazdowymi dla amatorów turystyki przyrodniczej. W wyniku analizy bibliometrycznej autorzy identyfikują skutki zmian klimatycznych na obszarach chronionych w Afryce Południowej oraz strategie adaptacyjne dla miejsc recepcji turystycznej, które umożliwią im dalsze funkcjonowanie. Do najczęściej wymienianych skutków zmian klimatycznych opisanych w anali-

zowanych badaniach należą redukcja gatunków, konflikty między ludźmi a dziką przyrodą, zmiany w jakości siedlisk i infrastruktury oraz różne skutki społeczne. Autorzy wskazują, na jakim poziomie zmieniające się warunki klimatyczne na obszarach chronionych wpływają na procesy ochrony przyrody i lokalną turystykę; w ten sposób przyczyniają się do rozwoju wiedzy na temat interakcji między dziką przyrodą a człowiekiem, strategii przetrwania stosowanych przez społeczności lokalne oraz interakcji pomiędzy tymi społecznościami a organizacjami zajmującymi się ochroną przyrody. Przedstawione syntetycznie dane mogą być wykorzystane w przyszłych badaniach na temat sposobów zwiększania odporności obszarów chronionych i otaczających je społeczności na skutki zmian klimatycznych; mogą też pomóc organizacjom społecznym i grupom zajmującym się ochroną środowiska w poprawie odporności społeczności lokalnych na skutki zmian klimatycznych oraz w informowaniu o strategiach adaptacyjnych opartych na ochronie miejscowych ekosystemów.

**Słowa kluczowe**: zmiany klimatyczne, obszary chronione, dzika przyroda, PRISMA, analiza bibliometryczna, Afryka

**JANUSZ ŁACH[a], ANETA MAREK[b]**

# Współczesna rola małych kalwarii w kontekście ochrony dziedzictwa krajobrazowego ziemi kłodzkiej

**Streszczenie.** W artykule przeanalizowano rolę krajobrazów sakralnych, reprezentowanych przez górskie kalwarie plenerowe znajdujące się na terenie ziemi kłodzkiej. Miejsca te, określane mianem „małych kalwarii", stanowią część dziedzictwa krajobrazowego regionu wymagającego ochrony. Celem przedstawionego badania było rozpoznanie cech typologicznych charakteryzujących małe kalwarie i wykorzystanie ich do oceny aktualnego stanu zachowania i funkcji tychże. W sumie na terenie ziemi kłodzkiej zidentyfikowano 15 małych kalwarii. Na podstawie analizy symbolicznych, architektonicznych oraz topograficznych aspektów badanych obiektów wyróżniono pięć planów kompozycyjnych. Każdy plan posiada zróżnicowaną formę architektoniczno-konstrukcyjną elementów tworzących zespół pasyjny, którym towarzyszą współczesne rzeźby świętych będące przejawem lokalnej kultury ludowej. Pomimo zmian politycznych, narodowościowych i religijnych, jakie nastąpiły po 1945 roku, małe kalwarie ziemi kłodzkiej, z wyjątkiem tych, które znajdują się w Młynowcu, Porębie i Wójtowicach, są nadal widoczne w terenie i stanowią świadectwo religijności mieszkańców regionu; trzy z pozostałych trzynastu (Radochów, Międzygórze oraz Lewin Kłodzki) zostały wysoko ocenione pod względem ich współczesnych funkcji i statusu. Obiekty charakteryzują się wysoką wartością historyczno-kulturową, teologiczną i emocjonalną o zasięgu regionalnym, krajowym, a nawet międzynarodowym w przypadku kalwarii na Iglicznej w Międzygórzu. Ze względu na te walory dawne określenie ziemi kłodzkiej jako „Krainy Pana Boga" (*Herrgottsland*) wydaje się nadal aktualne.

**Słowa kluczowe:** Polska, ziemia kłodzka, krajobraz sakralny, małe kalwarie, dziedzictwo kulturowe

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## 1.  Wstęp

Kalwarie, czyli zespoły kościołów lub kaplic symbolizujących stacje męki Pań-
skiej, zakładane były zazwyczaj na wzgórzach, tak by przypominały swym położe-
niem Jerozolimę. Miały odwzorowywać drogę męki Pańskiej, jaką przeszedł Jezus
Chrystus w Jerozolimie, idąc na Golgotę na ukrzyżowanie. Drogę tę wzbogacają
dodatkowe etapy, takie jak: Wieczernik, Ogrójec, pojmanie, sądy u żydowskich
arcykapłanów oraz kaplice upamiętniające wydarzenia po śmierci Jezusa: zmar-
twychwstanie, wniebowstąpienie, zesłanie Ducha Świętego.

Pierwsza kalwaria powstała w hiszpańskiej Kordobie w 1405 roku, a następne
pod koniec xv wieku we Włoszech i Niemczech. Obecnie w Europie znajduje się
708 kalwarii różnego typu, od wielkich kalwarii, przez małe kalwarie określane jako
kalwarie plenerowe, kalwarie przyklasztorne, przykościelne, po kalwarie cmen-
tarne (Bilska-Wodecka, 2003). W krajobrazie Polski kalwarie zaczęły pojawiać się
w xvii wieku. Za pierwszą uważana jest Kalwaria Zebrzydowska, reprezentująca
typ wielkiej kalwarii. Powstała w 1602 roku z inicjatywy Mikołaja Zebrzydowskiego
na górze Żar na Pogórzu Wielickim (Bilska-Wodecka, 2003). Od 1999 roku wpi-
sana jest na listę światowego dziedzictwa unesco. Na przestrzeni czterech wieków
na obszarze Polski powstało 29 tzw. wielkich kalwarii, często z inicjatywy możno-
władców lub zamożnych klasztorów. Trend fundacyjny ujawnił się również wśród
mniej zamożnych, lokalnych właścicieli ziemskich lub ambitnych proboszczów.
Dzięki nim od xviii wieku zaczęły pojawiać się założenia kalwaryjskie o mniejszym
rozmachu, tzw. małe kalwarie, zwane także kalwariami plenerowymi, ograniczające
się zwykle do terenowych stacji drogi krzyżowej z kilkoma kaplicami. Te plenerowe
kalwarie o rozbudowanej symbolice i wyszukanym artystycznym wyrazie, często
nawiązujące do lokalnej, ludowej stylistyki, były nierzadko stawiane jako wotum za
otrzymane łaski, stając się świadkami historii lokalnej społeczności. Ze względu na
swą religijną ważność i nietykalność stały się strażnikami przeszłości — łącznikami
pomiędzy krajobrazem czasów odległych i współczesnych, definiując mało znane
europejskie dziedzictwo kulturowe.

Małe kalwarie, czyli stacje drogi krzyżowej usadowione w krajobrazie górskim
nawiązującym do górskiej Jerozolimy, stanowią przedmiot rozważań niniejszego
artykułu w kontekście krajobrazowo-kulturowym. Badania nad ich rolą mają na
celu ochronę tych unikatowych, wyróżniających się na terytorium Europy założeń
architektoniczno-krajobrazowych. Jako przedmiot badań wybrano małe kalwarie
z ziemi kłodzkiej, obszaru o wyjątkowej dynamice zmian historycznych, kulturo-
wych, narodowościowych, społecznych i religijnych zachodzących od xvi wieku
po wiek xx. Wielowiekowe procesy transformacji urbanizacyjnej, industrializacyj-
nej i rolniczej zmieniały strukturę krajobrazową regionu i opierały się im jedynie

enklawy sakralnych krajobrazów traktowanych jako miejsca święte, nietykalne. Ta nietykalność sprawiła, iż zabytki te przetrwały do współczesności. Są one zlokalizowane w krajobrazie górskim, często w oddaleniu od jednostek osadniczych, przez co obecnie ulegają zapomnieniu i związanej z nim destrukcji.

W 2015 roku w celu wdrażania polityki zarządzania krajobrazem dla obszaru Polski została opracowana przez Tadeusza Chmielewskiego, Urszulę Mygę-Piątek i Jerzego Solona (2015) typologia krajobrazów. Krajobrazy kalwaryjskie, głównie wielkich kalwarii, zakwalifikowano w tej publikacji do typu krajobrazów podmiejskich i rezydencjonalnych o podtypie wielkoobszarowych zespołów sakralnych, historycznie uwarunkowanych, stanowiących leśno-wodno-rolno-osadniczą kompozycję przestrzenną bez jednoznacznego określenia tła krajobrazowego. Opracowanie to nie uwzględniło istoty krajobrazowej małych kalwarii, co daje podstawę do prowadzenia badań naukowych dla jego uzupełnienia.

Krajobraz sakralny małych kalwarii ziemi kłodzkiej stanowi niszowy, interesujący wątek badawczy z uwagi na charakter zmian religijno-polityczno-społeczno-historycznych, które nastąpiły w okresie XVII–XXI wieku dla badanego regionu i decydują o jego niepowtarzalnym charakterze, sprawiając, iż człowiek identyfikuje się z tożsamością miejsca — *genius loci*. Jak dotąd obiekty te były przedmiotem zainteresowania jedynie nielicznego grona krajoznawców, a w sferze badań naukowych pozostają typową *terra incognita*. Zagadnieniem zespołów kalwaryjnych, w szczególności wielkich kalwarii, w literaturze przedmiotu zajmowali się m.in. Čičo (1992, 1998), Jackson & Henrie (1983), Liutikas (2015), Matlovič (2005), Vaisvilaite (2002), Jackowski i in. (1999), Mitkowska (1983, 2003), Świerczek (1995), Lubos-Kozieł (2006), Myga-Piątek (2012). Problematykę badań w kontekście krajobrazowo-architektonicznym małych kalwarii z obszaru ziemi kłodzkiej poruszała Anna Mitkowska (2003), odnosząc się do kalwarii batorowskiej, międzygórskiej, radochowskiej, lewińskiej. Natomiast mniej znane obiekty w Porębie, Wójtowicach, Szczytnej, Bolesławowie czy Młynowcu opisane zostały przez Jastrzębskiego (1986, 1988a, 1988b, 1989, 1991), a także Jastrzębskiego i Mazurskiego (1988). Opracowania małych kalwarii dla ziemi kłodzkiej często oparte są na materiałach źródłowych pozyskanych podczas wywiadów środowiskowych oraz kwerend materiałów archiwalnych Dolnego Śląska.

Celem niniejszej pracy jest wyodrębnienie cech typologicznych definiujących tożsamość krajobrazowo-sakralną małych kalwarii na obszarze ziemi kłodzkiej, poprzez ich strukturę konstrukcyjno-architektoniczną oraz geograficzno-przestrzenną. Kolejnym celem jest ocena wartości historyczno-estetycznych oraz podejścia emocjonalnego mieszkańców regionu, wpływających na rangę i pełnione funkcje małych kalwarii. Dążeniem autorów jest zwrócenie uwagi na parytet krajobrazów kalwaryjskich w ochronie dziedzictwa kulturowego regionu ziemi kłodzkiej.

## 2. Charakterystyka geograficzno-historyczna ziemi kłodzkiej

Ziemia kłodzka wpisuje się w obszar dawnego Hrabstwa Kłodzkiego — krainy historycznej ze stolicą w Kłodzku. Omawiany region leży na południe od Dolnego Śląska. Obejmuje Kotlinę Kłodzką i otaczające ją tereny górskie: Góry Suche (stanowiące część Gór Kamiennych), Góry Stołowe, Góry Sowie, Góry Złote, Góry Bardzkie, Masyw Śnieżnika z Krowiarkami, Góry Bialskie, Góry Bystrzyckie, Góry Orlickie z Pogórzem oraz Wzgórza Ścinawskie. Powierzchnia ziemi kłodzkiej wynosi ponad 1640 km², stanowiąc obszar zróżnicowany morfologicznie i krajobrazowo (Marek & Olszak, 2014).

Obszar ziemi kłodzkiej został zasiedlony już w starożytności. W okresie średniowiecza tereny te stanowiły część Królestwa Czeskiego na granicy ziem czeskich i polskich. W XIII wieku ziemia stała się odrębną jednostką administracyjną, określaną w dawnych dokumentach jako *terra Glacensis* (ziemia kłodzka), a od XV wieku *comitatus Glacensis* (Lec, 2020). Analizując historię badanego obszaru w kontekście transformacji struktury wyznaniowej, mającej wpływ na istniejące dziedzictwo sakralne, należy odnieść się do XVI stulecia. W tym okresie za sprawą rozwoju i rozkwitu nowych prądów reformacyjnych zapoczątkowanych przez Marcina Lutra (1483–1546) doszło do zmiany wyznaniowej z katolickiej na luterańską. Głoszenie tak zwanej czystej ewangelii rozwijało się szybko dzięki protestantom, którzy stali w opozycji do wyznania rzymskokatolickiego. Jednakże w kolejnym wieku zaszła znacząca zmiana, nowi właściciele ziemi kłodzkiej — Habsburgowie — nakłonili bowiem do przyjęcia wyznania katolickiego niemal całą protestancką społeczność regionu (Wiszewski, 2006; Harasimowicz, 2010). Znaczącą rolę w procesie zmian wyznaniowych odegrali jezuici, którzy gromadzili wokół siebie licznych wyznawców. Wzbogacano liturgię śpiewem, organizowano koncerty, upiększano kościoły freskami o tematyce biblijnej i rzeźbami świętych. Również w terenie fundowano rzeźby świętych, krzyże pasyjne, kapliczki oraz zespoły kalwaryjskie. To między innymi za przyczyną jezuitów zainicjowano fundowanie kalwarii typu Nowa Jerozolima, czego przykładem z regionu jest fundacja Daniela Paschazjusza von Osterberga w 1683 roku w Wambierzycach. Wiek XVIII i XIX to szczególny czas fundacji małych kalwarii przez bogatych właścicieli ziemskich lub proboszczów zamieszkałych na ziemi kłodzkiej. Kolejnym trudnym okresem dla lokalnej religii był czas wojen śląskich (1740–1763), kiedy to król Fryderyk II Wielki odebrał Śląsk Austrii, a hrabstwo kłodzkie weszło w granice administracyjne Śląska. Jednakże poprzez artykuł 6 berlińskiego układu pokojowego wyznanie katolickie na terenie Hrabstwa Kłodzkiego objęte zostało nienaruszalnością, a władzę kościelną nad diecezją sprawował arcybiskup praski. Król pruski zobowiązał się do utrzymania status quo dla Kościoła katolickiego, zachowując jego stan posiadania w zakresie

budynków kościelnych, sieci parafialnej oraz istnienia zakonów (Wąs, 2002), co pozwoliło na przetrwanie zespołów kalwaryjskich do współczesności.

## 3. Metody badań

Dla osiągnięcia celów pracy autorzy przeprowadzili kilka działań badawczych. Obejmowały one inwentaryzację i opis zespołów kalwarii plenerowych na obszarze ziemi kłodzkiej pod kątem wiedzy historycznej (kwerenda materiałów źródłowych stanowiących niszę publikacyjną), architektury i historii sztuki, a także wiedzy geograficzno-krajobrazowej (pozycji morfologicznej, ekspozycji stoków, ich pokrycia, liczby obiektów stanowiących zespół kalwaryjski). Inwentaryzacja uwzględnia stan zachowania kalwarii oraz pełnione funkcje. Zadanie to miało na celu rozpoznanie charakterystycznych cech typologicznych krajobrazów kalwarii plenerowych z zastosowaniem metod Sowińskiej (2012) oraz Mygi-Piątek (2012). Metody te zmodyfikowano, po to aby określić tożsamość kalwarii plenerowych regionu sudeckiego i dokonać ich oceny krajobrazowo-sakralnej, a także przyjrzeć się ewentualnym zagrożeniom kulturowo-społecznym i możliwościom ochrony małych kalwarii.

Metodą, za pomocą której zrealizowano cel badawczy, był rekonesans terenowy małych kalwarii położonych na terenie ziemi kłodzkiej, przeprowadzony w latach 2022–2023. Pozwolił on pozyskać istotne informacje dokumentacyjno-opisowe (pozycja topograficzna założenia zespołów, pokrycie terenu, informacje historyczne, stan zachowania) oraz fotograficzne. Metoda ta umożliwiła określenie cech typologicznych definiujących tożsamość krajobrazowo-sakralną małych kalwarii na obszarze ziemi kłodzkiej. Zastosowano również metodę kwerendy materiałów źródłowych oraz naukowych dotyczących problemu badawczego i przedmiotu badań. W celu dokonania oceny krajobrazów małych kalwarii na potrzeby określenia ich obecnych funkcji i potencjalnych zagrożeń w kontekście ochrony posłużono się zmodyfikowaną metodą wyróżnienia materialnych i niematerialnych identyfikacji krajobrazów sakralnych, zastosowaną między innym przez Sowińską (2012) oraz Mygę-Piątek (2012), w oparciu o swobodny wywiad środowiskowy z osobami odwiedzającymi badane obiekty.

## 4. Struktura i funkcja krajobrazowa
małych kalwarii ziemi kłodzkiej

Spośród wielu typów krajobrazu kulturowego istotne miejsce zajmuje krajobraz sakralny, obejmujący kategorię rzeczy i działań wydzielonych przez określoną społeczność jako święte i w związku z tym podlegające czci religijnej. Akt wydzielenia odnosi się do mocy Boga i ma prowadzić do wyodrębnienia miejsc przeznaczonych dla Boga w celu sprawowania Jego kultu dla wywołania przeżyć religijnych (Jackowski i in., 1999). Krajobraz ten cechuje się obecnością w przestrzeni *sacrum* opartego na hierofanii[1], czyli objawieniu się świętości, stając się duchem miejsca, *genius loci* (Tuan, 1976; Park, 2003; Eliade, 2020). Krajobrazy sakralne stanowią o tożsamości miejsca, nasycone duchem miejsca (*genius loci*) mają swoje źródło w większości w niematerialnym wymiarze, często połączonym z symboliką. Jednakże wpływ religii wyznawanej przez dane społeczeństwo (cywilizację) za pomocą dóbr materialnych wyznacza jego granice przestrzenne (Holly, 2014). Krajobrazy sakralne, w szczególności plenerowe, stanowią wyraz harmonijnego powiązania treści i formy na tle przyrodniczym, czego przykładem są badane kalwarie plenerowe. Obecnie poddawane są one coraz większej presji: z jednej strony są porzucane, z drugiej — odnawiane. Dzieje się to często bez nadzoru architektonicznego (bez zachowania ich historyczno-architektonicznego kontekstu), pojawiają się elementy dysharmonijne, niezwiązane bezpośrednio z treścią kalwaryjską, np. groty lurdzkie, rzeźby świętych, m.in. św. Franciszka czy Jana Pawła II.

Współczesne rekonstrukcje dawnych krajobrazów sakralnych dążą do określenia i wzbogacenia wyjątkowego dziedzictwa regionu, kształtowanego w ciągu stuleci przez następowanie po sobie zmian narodowościowych, etnicznych czy religijnych, a obecnie poprzez rodzącą się tożsamość i poczucie małej ojczyzny wśród lokalnego społeczeństwa. Każdy obiekt kultu umiejscowiony w określonej przestrzeni przyrodniczej i kulturowej stanowi podstawę określającą tożsamość miejsca (Myczkowski, 2009). W chrześcijańskiej tradycji harmonijny krajobraz kalwarii, stanowiący efekt wielowiekowej tradycji przekształcania środowiska, traktowany jest jako udział człowieka w dziele stworzenia (Plit, 2012). Elementami warunkującymi umiejscowienie kalwarii są środowisko naturalne (morfologia, geologia, hydrografia, pokrycie terenu), uwarunkowania historyczne, społeczno-gospodarcze, tradycje kulturowe i architektoniczne, system wierzeń i obrzędowości danego

[1] Według M. Eliadego (2020) hierofania stawia nas w obliczu dokumentu historycznego, objawiając się w określonej sytuacji historycznej poprzez symbole (w odniesieniu do hierofanii definiowanych jako koherencja). Symbol ma niesłychane znaczenie dla magiczno-religijnego doświadczenia człowieka.

regionu kulturowego. Spośród powyższych elementów według Mitkowskiej (2003) w lokowaniu kalwarii nadrzędną rolę odgrywała topografia miejsca, gdyż sprzyjała tworzeniu obszaru nawiązującego do krajobrazu jerozolimskiego.

Słowo kalwaria odnosi się do zespołu kościołów i kaplic symbolizujących kolejne etapy męki Pańskiej. Definiuje ono układ przestrzenny obiektów religijnych w taki sposób, aby mogły spełniać funkcję kopii Jerozolimy, a zatem miejsca związanego z męką i śmiercią Jezusa Chrystusa. Tworzenie idealnych kopii krajobrazu jerozolimskiego było typowe dla xv–xviii wieku, kiedy powstawały wielkie kalwarie typu Nowa Jerozolima (Bilska, 1996; Bilska-Wodecka, 2003). W średniowieczu możnowładcy, którzy odbyli pielgrzymkę do Ziemi Świętej, często po powrocie stawiali w swych dobrach przy aprobacie władz kościelnych lub klasztornych kaplice nawiązujące do jerozolimskich pierwowzorów. Większości wiernych nie było stać na wyprawę do Jerozolimy, a nawiedzanie odwzorowanej drogi męki Pańskiej stało się alternatywą dla uzyskania odpustów religijnych. W następnych stuleciach symbolika ta zaczęła tracić na znaczeniu. Stawiano skromniejsze plenerowe drogi krzyżowe, tzw. małe kalwarie, składające się najczęściej z 14 elementów (Bilska-Wodecka, 2003) (rys. 1).
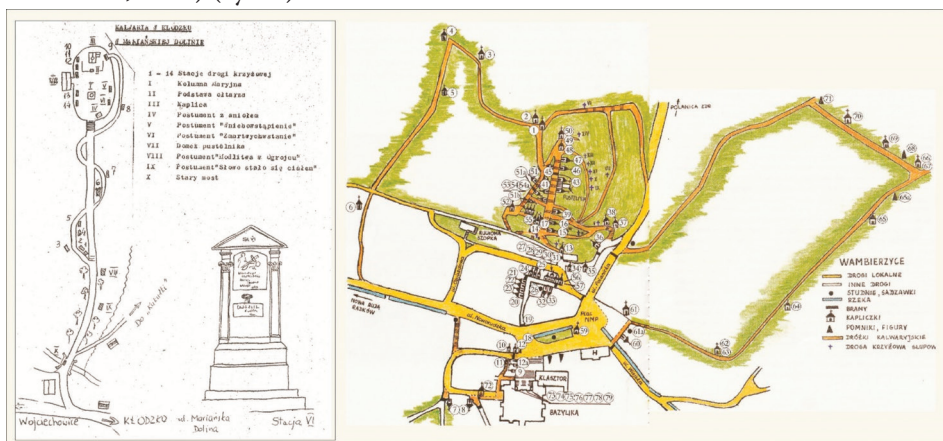


Rys. 1. Przykładowa grafika świadcząca o randze obiektów — prosty schemat układu przestrzennego małej kalwarii na Wzgórzu Marii w Wojciechowicach (źródło: Jastrzębski, Mazurski, 1988) oraz rozbudowany układ wielkiej kalwarii wambierzyckiej (źródło: Drożdż, 2009)

Plenerowe małe kalwarie, symbolizujące Drogę Krzyżową Jezusa Chrystusa, na obszarze ziemi kłodzkiej reprezentuje 15 zespołów o zróżnicowanych uwarunkowaniach lokalizacyjnych, architektonicznych oraz kompozycyjnych, decydujących o tożsamości religijnej i pielgrzymkowej, a także tożsamości sensorycznej i emocjonalnej, zapisanej w krajobrazie leśno-łąkowo-osadniczym (zob. tab.1).

Tab.1. Cechy typologiczne definiujące tożsamość krajobrazowo-
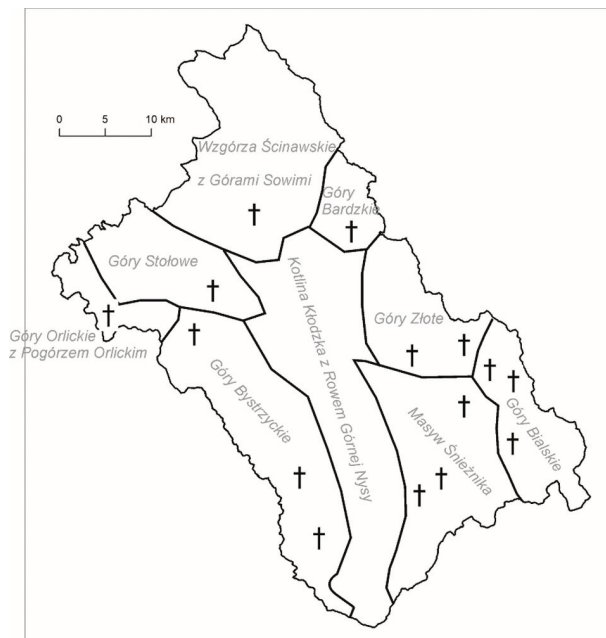-sakralną małych kalwarii na obszarze ziemi kłodzkiej

| Lp. | Lokalizacja | Region | Kontekst przyrodniczy | Kontekst historyczny | Forma i kompozycja architektoniczna | Religijna forma użytkowania | Stan |
|---|---|---|---|---|---|---|---|
| 1 | Młynowiec Rys. 4A | Góry Bialskie | Pd.-zach. stoki Gołogóry 997 i Łyśca 963, wys. 700–760 m, wzdłuż potoku Młynówka. Obszar porasta las iglasty. | Brak danych źródłowych | 14 betonowych krzyży o wymiarach śr. 47 cm na 90, na piaskowcowym postumencie 46×47×23 cm. Na krzyżach wykuto numery drogi krzyżowej. | Nie | Zły |
| 2 | Bolesławów „Suszyca" Rys. 4B | Góry Bialskie | Zach. stok Suszycy, na wys. 720–800 m. Dolina potoku bezimiennego (dolina inicjalna — odwadniana epizodycznie). Obszar porasta las mieszany. | XIX/XX w., wotum dziękczynne mieszkańca Bolesławowa za powrót synów z I wojny światowej | 14 drewnianych stacji drogi krzyżowej o wys. 80–125 cm. Forma kaplicy z malowidłem (34×25 cm) oraz dolną tabliczką informacyjną (28×20×3 cm). Kamienna grota Matki Bożej (ludowy charakter). | Tak | Bardzo dobry |
| 3 | Bolesławów „Ogrójec" Rys. 4L | Góry Bialskie | Pn. stoki Zawady 778 (Skalskiej Kopy) + antropogeniczny wąwóz. Obszar porasta zbiorowisko leśno-łąkowe. | 1833 r. Autor nieznany | Krzyż kamienny 63×168 cm na kamiennym nasypie o wysokości 135 cm, Ogrójec to 4 rzeźby piaskowcowe — apostołowie Jan (130 cm), Piotr (140 cm), Jakub (104 cm), Anioł (82 cm), Jezus (116 cm). Na szlaku do Ogrójca 3 kamienne krzyże. | Tak | Bardzo dobry |
| 4 | Stary i Nowy Gierałtów Rys. 4C | Góry Złote | Pd. stoki Szewczyka 753 i pd.-zach. stoki Czernika 832. Obszar porasta las mieszany. | Nowa droga krzyżowa od 2007 r. | 14 drewnianych krzyży z numerem stacji. Krzyże o wysokości 200–230 cm, szerokości ramion 120 cm, posiadają podwójną naprzemienną numerację z jednakowym motywem Chrystusa niosącego krzyż. W Starym Gierałtowie przy kościele stoi wcześniejszy model krzyża kalwaryjskiego. | Tak | Bardzo dobry |
| 5 | Radochów „Cierniak" Rys. 4D | Góry Złote | Pd. stoki i wsch. grzbiet Cierniaka 595. Obszar porasta las mieszany. | 1836 r. Fundator Anton Wachsmann | Zespół tworzy 216 schodów, wzdłuż których znajdują się 3 krzyże kamienne + 2 tablice z karawaką. Na szczycie 14 stacji ceglanych w formie edykułów (320×107 cm), kaplica z 1857 oraz 2 rzeźby (Rocha + Franciszka), ołtarz polowy i grota MB z Lourdes. | Tak | Bardzo dobry |
| 6 | Stary Waliszów Rys. 4E | Pasmo Krowiarek — Masyw Śnieżnika | Żelazne Góry — szczyt Krzyżowa 508. Obszar porasta las mieszany. | 1736 r. Fundator hrabia von Oppersdorf jako wotum za uzdrowienie córki | Barokowa kaplica św. Krzyża, w otoczeniu 14 kamiennych (piaskowcowych) krzyży (szer. 52 cm, wys. 187 cm), na przecięciu ramion tablice 63×47 cm z wizerunkiem wydarzeń kalwaryjskich. Krzyż na postumencie 78×80 cm. Krzyże oddalone od siebie 15–50 metrów. | Tak | Dobry |

| Lp. | Lokalizacja | Region | Kontekst przyrodniczy | Kontekst historyczny | Forma i kompozycja architektoniczna | Religijna forma użytkowania | Stan |
|---|---|---|---|---|---|---|---|
| 7 | Międzygórze „Maria Śnieżna" Rys. 4F | Masyw Śnieżnika | Grzbiet Igliczej 845 w kierunku wsch. Obszar porasta las mieszany. | 1781 r. | 14 kamiennych (pia-skowiec) 74×197 cm krzyży męki Pańskiej na kamiennym postu-mencie. Na przecięciu ramion metalowa tablica (78×45×5 cm) z płaskorzeźbą. Drodze krzyżowej towarzyszą stacje różańcowe + kościół pw. Matki Bożej Przyczyny Naszej Radości. | Tak | Bardzo dobry |
| 8 | Marianówka Rys. 4G | Masyw Śnieżnika | Pd. stoki Trzech Kopek 715, na wysokości 650 m. Obszar porasta las mieszany. | 2009 r. | 14 drewnianych rzeźbionych stacji drogi krzyżowej. Stacje mają wymiary 55×245 cm. | Tak | Bardzo dobry |
| 9 | Lasek Miejski Lewin Kłodzki Rys. 4J | Pogórze Orlickie | Pn.-zach. stoki grzbietu Pańszczycy 724, na wysokości 500 m. Obszar po-rasta las mieszany. | 1894 r. | 14 kamiennych edykułów z żeliwną płaskorzeźbą wy-darzeń pasyjnych | Tak | Bardzo doby |
| 10 | Kalwaria Batorów Rys. 4K | Góry Stołowe | Pn.-wsch. stoki Góry Świętej Anny 635. Obszar porasta las mieszany. | II połowa XIX w. | 14 kamiennych edykułów z obrazami wydarzeń pasyjnych na blasze | Tak | Dobry |
| 11 | Słupiec | Wzgórza Ścinawskie | Góra Wszystkich Świętych 647. Obszar porasta las mieszany, łąka. | II połowa XIX w. | 16 kamiennych edykułów z meta-lową płaskorzeźbą wydarzeń pasyjnych | Tak | Bardzo dobry |
| 12 | Wojciechowice Rys. 4I | Góry Bardzkie | Szczyt Wzgórze Marii 365. Obszar porasta las mieszany. | 1845 r. | 14 kamiennych edykułów z żeliwną płaskorzeźbą wydarzeń pasyjnych + kaplica + kolumna + edykuły zmartwychwstania, wniebowstąpienia, modlitwy w Ogrójcu oraz wprowadzający + domek pustelnika | Tak | Bardzo dobry |
| 13 | Szczytna Rys. 4H | Góry Bystrzyckie | Pd.-zach. stoki Szczytnika 588, na wysokości 550 m. Obszar porasta las mieszany. | 1940 r. | Kamienne obrazy wykute w skale piaskowcowej | Tak | Dobry |
| 14 | Poręba | Góry Bystrzyckie | Pd.-wsch. stoki szczytu o wysokości 949, na wysokości 650 m. Obszar po-rasta las mieszany. | 1878 r., ufun-dowane przez Wilhelma Peltza | Ruina kaplicy oraz 14 kapliczek słupowych | Nie | Zły |
| 15 | Wójtowice | Góry Bystrzyckie | Pd. stoki Poświętnej 842, na wysokości 700 m. Obszar po-rasta las mieszany. | Brak danych | Ruina krzyży | Nie | Zły |

Źródło: Opracowanie własne na podstawie badań terenowych z wykorzystaniem metody Sowińskiej (2012)

Wytypowanie cech diagnostycznych dla małych kalwarii na podstawie rekone-sansu terenowego i kwerendy materiałów źródłowych pozwoliło na typologiczną analizę historyczno-architektoniczno-krajobrazową:

- wszystkie obiekty powstały w okresie 1736–2009, większości jako wotum dziękczynne lokalnych liderów, a więc zamożnych właścicieli ziemskich lub księży. Ostatnia inicjatywa z 2009 roku w Starym i Nowym Gierałtowie to pomysł ks. Macieja Oliwy. Pięć przypadków z piętnastu posiada odpowiednie dokumenty;
- kalwarie lokowane są poza granicą obszaru zabudowanego, w terenie górskim Gór Bialskich, Gór Złotych i Masywu Śnieżnika, Gór Bystrzyckich — po trzy obiekty oraz po jednym obiekcie na terenie Pogórza Orlickiego, Gór Stołowych, Gór Bardzkich oraz Wzgórz Ścinawskich. Kalwarie stawiane były na wysokościach od 500 do 845 m n.p.m. na stokach i szczytach o ekspozycji południowo--zachodniej i południowej (67%) oraz ekspozycji północno-wschodniej (33%). Wybieranie południowo-zachodniej i południowej ekspozycji miało prawdopodobnie znaczenie ze względu na długość oświetlenia stoku oraz jego nagrzewanie w okresie wielkanocnym (wczesnowiosennym), pozwalające na szybsze topnienie zalegającej pokrywy śnieżnej, co sprzyjało obrzędowości — dotyczy to głównie kalwarii najmłodszych. Natomiast lokalizacja kalwarii w Radochowie, Międzygórzu czy Wojciechowicach, uważanych za najstarsze zespoły, uwarunkowana była teologicznymi założeniami, a więc orientowaniem założeń w kierunku wschodnim — w kierunku Jerozolimy (rys. 2);



Rys. 2. Mapa lokalizacji małych kalwarii na obszarze ziemi kłodzkiej
Źródło: Opracowanie własne

- współczesnym tłem krajobrazowym dla kalwarii są lasy świerkowe lub lasy mieszane. Wyjątek stanowią kalwaria w Bolesławowie „Ogrójec" oraz kalwaria w Starym i Nowym Gierałtowie, gdzie tłem są zespoły leśno-łąkowe. Ze względu na gęste pokrycie terenu drzewostan ten ogranicza otwartość formy, dając wrażenie zaniedbania, lecz z drugiej strony dodaje wyjątkowego mistycyzmu;

- najczęściej wykorzystywanym materiałem budulcowym był kamień. Do budowy trzynastu obiektów wykorzystano piaskowiec, jako surowiec powszechnie występujący w Sudetach. Do budowy trzech kalwarii: w Marianówce, Bolesławowie „Suszycy" oraz Starym i Nowym Gierałtowie wykorzystano drewno, tylko zaś w jednym przypadku w Radochowie do budowy posłużyła cegła;

- plan kompozycyjny omawianych obiektów jest zróżnicowany pod względem formalnych rozwiązań. Badania pozwoliły wyróżnić dwa główne plany — liniowy oraz owalny, spośród których wydzielono pięć podtypów: dwa liniowe (L), dwa owalne (O) oraz dwa złożone liniowo-owalne (L/O). Model liniowy L/A charakteryzuje się istnieniem na początku lub na końcu drogi krzyżowej kaplicy lub kościoła. Plan ten obecnie reprezentują założenia m.in. w Marianówce, w Międzygórzu na Iglicznej, w Lewinie Kłodzkim, natomiast w Porębie, Wójtowicach czy na Młynowcu o istnieniu kaplic świadczą już tylko zarysy fundamentów. Model liniowy L/B reprezentuje droga krzyżowa w Starym i Nowym Gierałtowie, gdzie na początku i na końcu znajduje się kościół — jest to najmłodszy i jedyny tego typu plan kompozycyjny małej kalwarii na ziemi kłodzkiej. Drugim planem kompozycyjnym jest model owalu. Tu wyróżnić możemy dwa podtypy z kaplicą pośrodku. Podtyp O/A obecny jest np. w Radochowie, Starym Waliszowie. Wyjątkiem jest kalwaria w Bolesławowie „Suszycy", gdzie w owalu nie istnieje kaplica. Plan O/B z kaplicą w granicy owalu reprezentuje kalwaria w Batorowie. Wyjątkowy plan kompozycyjny O/L/B reprezentują kalwarie w Wojciechowie oraz Słupcu, gdzie łączy się dwa plany: początkowo liniowy, a następnie owalny, nawiązując do północnowłoskich założeń „świętej góry" — *sacri monti* Piemontu (rys. 3). Spośród 15 kalwarii unikatowa jest kalwaria w Bolesławowie. Reprezentuje ona plan L/A, z kościołem św. Józefa jako początkowym elementem planu kompozycyjnego, lecz na końcu drogi krzyżowej znajduje się grupa rzeźb: figura modlącego się Jezusa, figury trzech śpiących uczniów Jezusa (Apostołów) oraz figura anioła. Obecnie plan kompozycyjny jest niekompletny — brakuje krzyży pasyjnych wyznaczających stacje drogi krzyżowej.
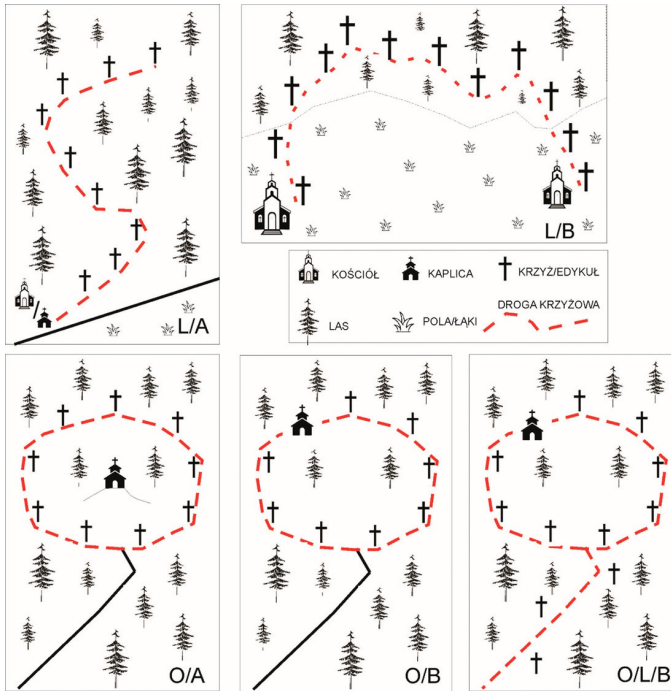
Rys. 3. Układy kompozycyjne małych kalwarii na ziemi kłodzkiej
Źródło: Opracowanie własne

Spośród architektonicznych form tworzących plan kompozycyjny wyróżnić można **krzyże i edykuły**[2] o zróżnicowanej formie architektoniczno-konstrukcyjnej (rys. 4). Te ostatnie charakterystyczne są dla Radochowa oraz Marianówki. Najnowszą formę architektoniczną drogi krzyżowej reprezentują drewniane edykuły w Marianówce oraz drewniane krzyże pasyjne Starego i Nowego Gierałtowa, gdzie zastosowano podwójne oznaczenie literowe stacji, pozwalające na odbycie pielgrzymki z dwóch wspomnianych miejscowości z zachowaniem założeń przebiegu męki Pańskiej. Tak zwana odwrotna numeracja ozdobiona jest tym samym obrazem Chrystusa niosącego krzyż. Formy kamiennych lub drewnianych krzyży oraz edykułów uzupełniają płaskorzeźby wykonane w kamieniu oraz w metalu (w Międzygórzu, Lewinie, Kłodzku) lub obrazy namalowane na drewnie lub blasze (w Starym Waliszowie, Bolesławowie „Suszycy", Starym i Nowym Gierałtowie) (rys. 5).

Układy kompozycyjne drogi krzyżowej wzbogacają: **kościoły** w Międzygórzu, Starym i Nowym Gierałtowie (od których rozpoczyna się i kończy droga krzyżo-

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[2] Edykuł — kapliczka z frontonem wspartym na kolumnach albo nisza stanowiąca tło dla rzeźby, płaskorzeźby lub obrazu malarskiego.

Rys. 4. Formy architektoniczno-konstrukcyjne stacji drogi krzyżowej małych kalwarii na terenie ziemi kłodzkiej: A — Młynowiec, B — Bolesławów „Suszyca", C — Stary Gierałtów — Nowy Gierałtów, D — Radochów „Cierniak", E — Stary Waliszów, F — Międzygórze „Maria Śnieżna", G — Marianówka, H — Szczytna, I — Wojciechowice, J — Lewin Kłodzki, K — Batorów, L — Bolesławów „Ogrójec"
Źródło: Autorzy

wa), **kaplice** w Radochowie, Starym Waliszowie, Batorowie, **groty** Matki Bożej z Lourdes w Bolesławowie „Suszycy" oraz Radochowie, **kolumny maryjne** w Wojciechowicach, **rzeźby świętych** w Radochowie (rys. 6).
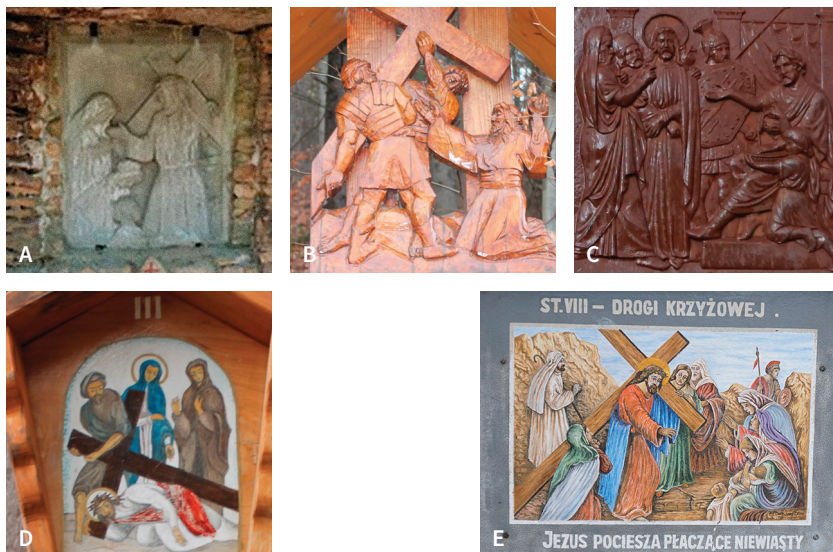
Rys. 5. Style obrazowania wydarzeń pasyjnych małych kalwarii na ziemi kłodzkiej: A — płaskorzeźba w kamieniu, B — rzeźba w drewnie, C — metaloplastyka, D — obraz na drewnie, E — obraz na metalu
Źródło: Opracowanie własne



Rys. 6. Obiekty towarzyszące stacjom drogi krzyżowej małych kalwarii na ziemi kłodzkiej
Źródło: Opracowanie własne

Kolejnym wyróżnikiem materialnej tożsamości krajobrazów sakralnych małych kalwarii ziemi kłodzkiej jest kontekst religijny i historyczno-społeczny, nawiązujący do prądu kontrreformacyjnego, który w okresie od XVII do XIX wieku wpływał na religijność mieszkańców obszaru za przyczyną jezuitów. Współcześnie za stan zachowania oraz funkcje religijne odpowiadają parafie rzymskokatolickie, a dokładniej sami mieszkańcy, skupieni przy rezydującemu księdzu. Obiekty te stanowią wciąż miejsca rozważań męki Pańskiej w sąsiedztwie naturalnego krajobrazu, podkreślając aspekt duchowy. Istniejące zespoły kalwaryjskie, poza trzema, pełnią funkcję sakralną, choć stan zachowania jest zróżnicowany. Najlepiej zachowane kalwarie znajdują się w Międzygórzu, Marianówce, Radochowie, Bolesławowie „Suszynie". Zaniedbane stacje drogi krzyżowej widoczne są w Młynowcu, Porębie oraz Wójtowicach. Niestety, nie wszystkie obiekty są kompletne. Przykładem jest kalwaria Bolesławów „Ogrójec". Tam widoczne są jedynie trzy krzyże, które prowadzą do zespołu modlitwy w Ogrójcu. W większości obiektów notuje się brak elementów dezintegrujących przestrzeń, wyjątek stanowią obiekty w Bolesławowie, w Radochowie oraz Międzygórzu, gdzie przy zespołach kalwaryjskich dodano inne treści religijne, takie jak: groty Matki Bożej lub rzeźby świętych. Kalwarie zachowują swoją integralność stylu, formy, koloru oraz materiałów, z których są wykonane (wyjątek może stanowić droga krzyżowa na Młynowcu, gdzie brakujące, dawne kamienne krzyże zastąpiono betonowymi). Prawie wszystkie obiekty reprezentują czystość i czytelność formy, poza kalwarią w Porębie oraz Wójtowicach. W krajobrazie ziemi kłodzkiej tylko jedna kalwaria reprezentuje rozciągłość przestrzenną — to droga krzyżowa łącząca na odcinku około 4 km Stary Gierałtów z Nowym Gierałtowem. Pozostałe kalwarie zajmują mniejszy obszar. W przypadku zniszczonych kalwarii w Porębie oraz Wójtowicach brak czytelnych i ostrych granic założenia formy.

Obok wyróżników materialnych warto zwrócić uwagę na wyróżniki niematerialne, które odgrywały także znaczącą rolę w kształtowaniu się krajobrazów sakralnych. Tworzenie zespołów małych kalwarii w znacznej mierze spowodowane było różnymi wydarzeniami, z jakimi mierzyli się mieszkańcy sąsiadujących miejscowości. Najczęściej zatem kalwarie stanowiły *ex vota*, będące podziękowaniami za otrzymane łaski, np. uzdrowienie z choroby. Przykładem takiej kalwarii są obiekty w Radochowie, Starym Waliszowie czy Bolesławowie „Suszycy". Kalwarie fundowano w miejscach, w których wcześniej powstała świątynia (kaplica, kościół), zatem w bezpośredni sposób łączą się one z danym obiektem pielgrzymkowym, podnosząc jego rangę (Radochów, Maria Śnieżna, Stary Waliszów). Innym wyróżnikiem wyboru miejsca i nazwy kalwarii może być sąsiedztwo klasztoru, czego przykład można znaleźć w Marianówce, gdzie klasztor założyli ojcowie salezjanie.

W celu dokładniejszego rozpoznania tematyki dokonano oceny krajobrazu małych kalwarii w oparciu o siedem kryteriów. Uwzględniono ich wiek, wartość historyczną, wartość estetyczną, harmonię, treść, wyjątkowość i wartość emocjonalną (zob. tab. 2).

Tab. 2. Kryteria oceny krajobrazu małych kalwarii na potrzeby
określenia ich obecnych funkcji i potencjalnych zagrożeń

| Lokalizacja | Wiek | Wartość historyczna | Wartość estetyczna | Harmonia | Treść | Wyjątkowość | Wartość emocjonalna | Suma |
|---|---|---|---|---|---|---|---|---|
| Młynowiec | 1 | 1 | 1 | 2 | 1 | 1 | 1 | 8 |
| Bolesławów (Suszyca) | 2 | 1 | 2 | 3 | 1 | 2 | 2 | 13 |
| Bolesławów „Ogrójec" | 2 | 1 | 2 | 3 | 1 | 2 | 2 | 13 |
| Stary i Nowy Gierałtów | 1 | 1 | 1 | 2 | 1 | 1 | 2 | 9 |
| Radochów „Cierniak" | 2 | 1 | 3 | 3 | 2 | 2 | 3 | 16 |
| Stary Waliszów | 2 | 1 | 2 | 3 | 1 | 2 | 2 | 13 |
| Międzygórze „Maria Śnieżna" | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 20 |
| Marianówka | 1 | 1 | 1 | 3 | 1 | 1 | 2 | 10 |
| Lasek Miejski Lewin Kłodzki | 2 | 2 | 2 | 3 | 2 | 2 | 2 | 15 |
| Batorów | 2 | 2 | 1 | 3 | 2 | 2 | 2 | 14 |
| Słupiec | 2 | 1 | 2 | 2 | 2 | 2 | 2 | 13 |
| Wojciechowice | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 14 |
| Wójtowice | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 8 |
| Szczytna | 2 | 1 | 1 | 1 | 1 | 2 | 2 | 10 |
| Poręba | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 8 |
| Objaśnienie punktacji | | | | | | | | |
| Wiek | 3 pkt. — krajobraz, w którym zachowane są elementy kulturowe starsze niż 300 lat; 2 pkt. — krajobraz z elementami kulturowymi w wieku 300–100 lat; 1 pkt — krajobraz zawierający elementy kulturowe młodsze niż 100 lat. | | | | | | | |
| Wartość historyczna | 3 pkt. — krajobraz, w którym utrwalone zostały wydarzenia historyczne o skali i randze krajowej; 2 pkt. — krajobraz, w którym utrwalone zostały wydarzenia historyczne o skali i randze regionalnej; 1 pkt — krajobraz, w którym nie zostały utrwalone wydarzenia historyczne i nie jest on kojarzony z takimi wydarzeniami. | | | | | | | |
| Wartość estetyczna | 3 pkt. — krajobraz dający odczucie wysokiej estetyki; 2 pkt. — krajobraz o nieznacznie zaburzonej estetyce; 1 pkt — krajobraz przeciętny, dysharmonijny. | | | | | | | |
| Harmonia | 3 pkt. — pełna zgodność kompozycyjna, dająca poczucie porządku i ładu przestrzennego oraz ciągłości funkcji; 2 pkt. — nieznaczne zaburzenie porządku, ładu i ciągłości funkcji; 1 pkt — całkowite poczucie chaosu przestrzennego i brak ciągłości funkcji. | | | | | | | |
| Treść | 3 pkt. — istotna i łatwo określona symbolika krajobrazu o wyrazistym *genius loci* o randze ogólnopolskiej; 2 pkt. — symbolika o skali i randze regionalnej; 1 pkt — symbolika o skali i randze lokalnej. | | | | | | | |
| Wyjątkowość | 3 pkt. — krajobraz oryginalny i niepowtarzalny w skali ogólnopolskiej; 2 pkt. — krajobraz oryginalny i niepowtarzalny w skali regionalnej; 1 pkt — krajobraz o cechach typowych i powtarzalnych. | | | | | | | |
| Wartość emocjonalna | 3 pkt. — społeczność lokalna wykazuje ścisłe związki emocjonalne z miejscem; 2 pkt. — związki społeczne z miejscem dotyczą tylko wybranych grup społecznych i wiekowych; 1 pkt — społeczność lokalna nie identyfikuje się z tradycją miejsca i nie dba o stan przestrzeni. | | | | | | | |

Źródło: Opracowanie własne na podstawie badań terenowych z wykorzystaniem metody Mygi-
-Piątek (2012), zmodyfikowanej ze względu na potrzeby i specyfikę przedmiotu badań

Dwanaście obiektów reprezentuje ponadstuletnią historię, przekładającą się na bogatą formę architektoniczno-krajobrazową. Dwa z analizowanych obiektów datuje się na xx stulecie, jeden obiekt powstał w xxi wieku.

**Wartość historyczna** — najcenniejszym krajobrazem kalwaryjskim na badanym obszarze, w którym utrwalone zostały wydarzenia historyczne o skali i randze regionalnej, jest kalwaria w Międzygórzu. Ważnym wydarzeniem wpływającym na rangę było przyłączenie Hrabstwa Kłodzkiego do Prus w 1742 roku, które wiązało się z istotnymi zmianami geopolitycznymi i religijnymi. Nowe pruskie prawo ograniczyło wyznawcom katolickim możliwości pielgrzymowania, m.in. do Mariazell w Austrii. W celu rozwiązania zaistniałego problemu w 1750 roku mieszkaniec wioski Wilkanów, Krzysztof Veit, przywiózł wykonaną z drewna lipowego ludową kopię figury Matki Bożej z Mariazell. Figurka zapoczątkowała ruch pielgrzymkowy do małej kapliczki na Górze Iglicznej w Międzygórzu, gdzie w 1781 roku wmurowano kamień węgielny pod powstające sanktuarium Matki Bożej Przyczyny Naszej Radości „Maria Śnieżna". Obecnie sanktuarium na Górze Iglicznej jest ważnym miejscem pielgrzymkowym dla mieszkańców regionu, kraju oraz pielgrzymów z zagranicy. Pozostałe zespoły kalwaryjskie reprezentują krajobrazy, w których nie zostały utrwalone wydarzenia historyczne i nie są one kojarzone z takimi wydarzeniami, okoliczni mieszkańcy, czując potrzebę wdzięczności Bogu, stawiali po prostu drogi krzyżowe jako wotum.

**Wartość emocjonalna** — z dwoma obiektami mającymi status sanktuarium społeczność lokalna wykazuje ścisłe związki emocjonalne ze względu na rangę i pełnione funkcje wyjątkowego, świętego miejsca. Mowa o sanktuarium Matki Bożej Przyczyny Naszej Radości „Maria Śnieżna" w Międzygórzu, z całorocznym ruchem pielgrzymkowym krajowym i międzynarodowym, oraz sanktuarium Matki Bożej Wspomożenia Wiernych w Radochowie, z przeważającym lokalnym ruchem pielgrzymkowym. Kryterium **wartości emocjonalnej** dotyczącej wybranych grup społecznych i wiekowych spełnia Marianówka i znajdujący się tam klasztor salezjanów. Zakonnicy poprzez prowadzenie ukierunkowanych rekolekcji wpływają na ruch pielgrzymkowy i udział w obrzędach drogi krzyżowej. W pozostałych obiektach, które uzyskały 2 pkt., emocjonalnie angażują się wspólnoty parafialne. Obiektami, z którymi obecnie nie identyfikuje się społeczność lokalna i nie dba o stan przestrzeni, są kalwarie: Młynowiec, Poręba oraz Wójtowice. Stan ten spowodowany jest wyludnianiem się tych terenów.

**Wyjątkowość** to kryterium istotne dla określenia kierunków zachowania obiektów w perspektywie następnych dekad. Zespoły kalwaryjskie ziemi kłodzkiej w kontekście architektoniczno-krajobrazowym charakteryzują się głównie treścią ludową. Treści o randze wyższej, nawiązującej do historycznych trendów stylistycznych, m.in. barokowych, wykazują zespoły w Międzygórzu, Starym Wa-

liszowie, Batorowie, które dodatkowo poprzez wysoką rangę religijną stanowią swoiste *genius loci*. Wyjątkowość treści można zaobserwować jeszcze w zespole kalwaryjskim w Radochowie, poprzez charakterystyczną architekturę stacji dróg krzyżowych w formie edykułów, kaplicy czy fundacyjnych stopni prowadzących na wzgórze kalwaryjskie Cierniak, gdzie wypisane są nazwiska dawnych dobroczyńców (rys. 7).



Rys. 7. Radochów „Cierniak" — prowadzące na wzgórze kalwaryjskie
granitowe stopnie z imionami i nazwiskami fundatorów
Źródło: J. Łach

Na wyjątkowość miejsca w znacznym stopniu odpowiada harmonia, czyli zgodność kompozycyjna pozwalająca na odczuwanie porządku i ładu przestrzennego. Z badanych zespołów wszystkie wykazują pełną zgodność krajobrazowo-architektoniczną z duchem miejsca, na którą wpływa naturalność morfologiczna wraz z leśno-łąkowym tłem.

## 5. Wnioski

Małe kalwarie ziemi kłodzkiej zakładano w krajobrazie górskim, starając się zbliżyć do oryginału topograficznego Jerozolimy (święta góra — święte wzgórze). Stawiano je w celu zapewnienia pielgrzymom uzyskania odpustów, a nie przeżyć estetycznych, stąd też widoczna jest skromność architektoniczna i symboliczna. Miały stanowić przestrzeń do rozważań męki Pańskiej, ale również być miejscem odgrywania misteriów pasyjnych. Potrzeba stawiania kalwarii była formą zachowania tożsamości poprzez więź z przeszłością. Do realizacji założeń kalwaryjskich wykorzystywano zarówno elementy przyrodnicze, jak i antropogeniczne, kreując różnorodne, nasycone symboliką kompozycje krajobrazowe. Analiza, a następnie ocena krajobrazów sakralnych małych kalwarii została przeprowadzona w nurcie realnym, polegającym na umiejscowieniu obiektów w krajobrazie górskim, leśnym, leśno-łąkowym, oraz w nurcie estetycznym, gdzie łączono oryginalność założeń kompozycji na tle przyrody. Badania terenowe pozwoliły zidentyfikować na terenie ziemi kłodzkiej aż 15 małych kalwarii o zróżnicowanym planie kompozycyjnym, od prostego typu liniowego do złożonego owalno-liniowego, nawiązującego do wyjątkowego planu *sacri monti* Piemontu, „świętej góry Piemontu" z północnych Włoch. Z analizy znaczeń symbolicznych, architektonicznych oraz topografii miejsca badanych kalwarii w kontekście przyrodniczo-przestrzennym wynika, że ziemię kłodzką wciąż nazywać można „Krajem Pana Boga" (*Herrgottsland*). To wyjątkowe dziedzictwo, którego współczesny język artystyczny, często ludowy, mówi o wrażliwości mieszkańców tych terenów. Małe kalwarie zaliczane są do miejsc świętych (*sacrum*) ziemi kłodzkiej. Charakteryzują się istnieniem bogatej symboliki strefy materialnej i niematerialnej, tworzących niepowtarzalny klimat miejsca (*genius loci*) i podnoszących jego wartość w kontekście religijnym i kulturowym.

Warto zwrócić uwagę, że pomimo zmian politycznych, narodowościowych i religijnych, jakie miały miejsce po 1945 roku, małe kalwarie ziemi kłodzkiej (poza kalwariami w Młynowcu, Porębie i Wójtowicach, które mają niską wartość funkcjonalną) są nadal widoczne w terenie i stanowią świadectwo wielkiej religijności mieszkańców regionu. Aż 25% osiągnęło wysoką ocenę ze względu na współczesne funkcje i status — są to zespoły kalwaryjskie w Radochowie, Międzygórzu oraz Lewinie Kłodzkim. Obiekty te wykazują wysoką wartość historyczno-kulturową, teologiczną i emocjonalną o zasięgu regionalnym, krajowym, a nawet międzynarodowym, jak w przypadku kalwarii na Iglicznej w Międzygórzu. Pozostałe zespoły małych kalwarii reprezentują dobrą (przeciętną) wartość emocjonalno-społeczną o zasięgu lokalnym i regionalnym. Przedstawiona typologia i ocena uświadamia rangę krajobrazów kalwaryjskich ziemi kłodzkiej, które powinny zostać poddane ochronie prawnej z zakresu ochrony zabytków i krajobrazów zabytkowych. Dlatego

wartością dodaną powyższych badań jest uzupełnienie typologii Chmielewskiego, Mygi-Piątek i Solona (2015) — małe kalwarie reprezentują typ krajobrazu wiejskiego o podtypie małoobszarowego zespołu sakralnego, historycznie i kulturowo powiązanego z regionem o określonym tle krajobrazowym, leśnym i leśno-rolniczym, który stanowi obecnie *quasi*-naturalny krajobraz górski ziemi kłodzkiej.

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## Small Calvary Complexes as Part of the Landscape Heritage in the Klodzko Region

**Abstract.** The article addresses the importance of sacred landscapes, represented by calvary complexes located in Kłodzko's mountainous areas, known as 'small calvaries', which are part of the region's landscape heritage in need of protection. The aim of the study described in the article was to identify typological features that characterise small calvaries and to use them for assessing their current state of preservation and functions. 16 small calvaries were identified in the Kłodzko region. After analysing their symbolic, architectural and topographic aspects, it was possible to distinguish five compositional plans. Each plan is characterised by different architectural and structural elements that make up the a calvary complex (including crosses, edifices, chapels, or churches) and are accompanied by new sacred sculptures, which are an expression of modern folk culture. Despite political, ethnic and religious changes after 1945, small calvaries in the Kłodzko region, with the exception of those located in Młynowiec, Poręba and Wójtowice, are still visible and serve as testimony to the religiosity of the region's inhabitants; three of the remaining thirteen calvaries (Radochów, Międzygórze and Lewin Kłodzki) were highly assessed in terms of their functions and state of preservation. The sites have a historical, cultural, theological and emotional value of regional, national,

and even international significance in the case of the calvary complex on Igliczna in Międzygórze. Consequently, it can be argued that the old description of Kłodzko as 'God's Land' (*Herrgottsland*) is still valid today.

**Keywords:** Poland, the Klodzko region, sacred landscape, small calvaries, cultural heritage

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# The Effect of CSR on Restaurants' Brand Image and Customers' Brand Attitudes as Evidenced by Their Purchase Intentions

**Abstract.** This study aims to identify CSR dimensions which affect restaurants' brand image and customers' brand attitudes and assess the impact of these two mediating variables impact on customers' purchase intentions. The study is based on information from 417 questionnaires distributed among restaurant customers in Tehran. Structural equation modelling (SEM) was used to test the conceptual model and results reveal that economic CSR is inversely correlated with brand image and brand attitude, although this relationship is not significant. This means that if customers feel that restaurants pay too much attention to profitability, they may have a negative attitude towards these restaurants. Other CSR dimensions (legal, ethical, philanthropic and environmental) were found to have a positive effect on brand image and customers' brand attitudes, both of which make them more likely to use their services. Therefore, restaurant owners should be aware of different implications of CSR activities and choose those that are likely to improve restaurants' brand image and be positively perceived by customers.

**Keywords:** corporate social responsibility, brand image, brand attitude, purchase intention

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## 1. Introduction

Corporate social responsibility (CSR) has been of interest to researchers, companies and institutions. Han et al. (2020) define CSR as a set of specific practices in which companies prioritize the social good over their personal interests. Since business operations are known to affect the external environment and consumer behaviour, CSR is used as a strategic approach to overcome negative impacts of business activity (Islam et al., 2020). Thus, companies carry out activities to positively influence their stakeholders, especially their customers (Rodríguez, Montiel & Ozuna,

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2013), and a growing number of firms have adopted CSR principles (Cramer, Jonker & Heijden, 2004), and they have tried to implement various CSR activities to comply with norms of societies in which they operate. Many of these companies include those that operate in the tourism and hospitality industry (Lee et al., 2020), since operations of these types of businesses can have significant social and environmental effects (Kim et al., 2017; Achmad & Yulianah, 2022). For example, restaurants are one of the most important factors that tourists consider when choosing a holiday destination and play an important role in the development of their local economy (Farsani et al., 2016). According to Severt et al., (2019), when choosing a restaurant customers take into account not only a good choice of meals on the menu but also its CSR performance.

According to Keller and Swaminathan (2019, brand image refers to how customers perceive the brand. CSR is believed to be one of the key factors that affects and can improve brand image (Ramesh et al., 2019). Earlier studies indicate that CSR activities can be used to improve brand image and brand reputation (Freeman,1984; Gupta, 2002). Examples of these activities include engaging in social affairs and providing fair treatment to employees (David, Kline & Dai, 2005) reducing the consumption of natural resources (Manaktola & Jauhari, 2007) and respecting the environment (Salmones, Crespo & Bosque, 2005). Later on it was found that CSR could also enhance brand image of restaurants, with positive effects on its performance (Tong & Wong, 2016). It was found that when making purchase decisions, customers are not only influenced by tangible factors (such as price), but intangible aspects such as brand image (Cretu & Brodie, 2007; Ramesh et al., 2019).

Early studies suggest that brand attitude, i.e. the reaction of customers towards a brand, is a useful variable in predicting response to marketing activities (Howard, 1994). According to Ramesh et al. (2019), brand attitude can influence consumers' psychological dispositions either positively or negatively towards a specific brand, product or service. This is a basic premise for all service-related industries including the restaurant sector. According to these studies, brand attitude is determined by the level of customer familiarity and trust in the brand, and the higher the level of familiarity and trust, the greater the likelihood of an actual purchase (Ramesh et al., 2019).

Over the last decade studies have investigated the effect of CSR on purchase intentions. Several of these studies concluded that CSR can have a significant impact (Rodrigues & Borges, 2015; Wongpitch et al., 2016; Boccia & Sarnacchiaro, 2018; Luffarelli & Awaysheh, 2018) while some suggested that CSR had no significant impact on customers' purchase intentions (Castaldo, 2009; Chomvilailuk & Butcher, 2010; Ramesh et al., 2019). The aim of this study is to identify which CSR dimensions affect brand image and brand attitude in order to assessing how the mediating

effect of these two variables influences purchase intentions of restaurant customers. Although research in the field of csr is very extensive, this study includes five additional dimensions of csr that can affect brand image and attitude. The analysis focuses on the restaurant industry in Iran.

## 2.  Literature Review

### 2.1.  Corporate Social Responsibility

Over the last decades, the concept of csr has evolved (Anjum, 2016), resulting in the emergence of different definitions (Dahlsrud, 2008) although none has been universally accepted (Garriga & Melé, 2004; Secchi, 2007; Freeman & Hasnaoui, 2011; Zicari, 2014; Anjum, 2016; Asrar-ul-Haq, Kuchinke & Iqbal, 2017). Since companies have their own stakeholders and operate in a particular social context, as a result, they need to respect obligations towards their stakeholders, which can include csr-related activities considered. According to Sen and Bhattacharya (2001), companies concerned about their csr should pay special attention to customers, since csr activities have the greatest impact on customers. Another thing worth noting is that attitudes of customers have also changed: today they are no longer satisfied with the high quality or low price of products and services; they expect more (Bhattacharya & Sen, 2004). As a result, companies must step up their efforts to come up to these expectations. According to recent studies, very often purchase intentions of customers are affected by companies' csr performance (Cheng et al. 2021; Singh & Verma, 2017).

Studies show that customers tend to buy from companies that show concern for social issues and many of such companies implement csr-related activities (Bhattacharya & Sen, 2004; Barcelos et al., 2015; Carlucci et al., 2015; Zhao & Zhong, 2015). Studies also show that customers sometimes punish companies by not purchasing their products or services becasuse they ignore social issues or social norms (Sen & Bhattacharya, 2001; Simmons & Becker-Olsen, 2004; Webb, Mohr & Harris, 2008). Hence many companies place emphasis on csr activities (Cramer, Jonker & Heijden, 2004; Han, Yu, & Kim, 2019). Since csr activities have been shown to serve as a source of competitive advantage for businesses, the restaurant industry could benefit from greater involvement in csr (Rhou, Singal & Koh, 2016).

## 2.2. Dimensions of CSR

Few studies have investigated the effect of CSR dimensions on customers' purchase intentions and they have been relatively simple in some respects. For example, one study showed that a company's philanthropic motivations have a positive effect on attitudes towards the company, which is evident in their purchase intentions (Wongpitch et al., 2016). A later study by Resmi, Begum & Hassan (2018) sought to investigate the impact of CSR on the financial performance of agricultural industries in Bangladesh over a three-year period. Results of this study showed that companies that practiced CSR performed better in terms of return on equity (ROE) and net income.

A year later Ramesh et al. (2019) conducted a study in which they measured the direct or indirect effect of CSR activities on purchase intentions. The study applied structural equation modelling (SEM) to validate the results which showed that CSR activities had a direct positive effect on brand image and brand attitude, while these two factors had a direct positive effect on purchase intentions (Ramesh et al., 2019). However, this study did not find any direct effect of CSR on purchase intentions. In 2020, Lee et al. investigated the role of CSR in maintaining customers in the restaurant industry. Results indicated that except for the economic dimension, other dimensions of CSR play a significant role in increasing brand attitude and service quality. Additionally, the above relationships were found to have a positive effect on customer retention (Lee et al., 2020).

Deegan (2002) argues that improvements in CSR lead to better brand image and help to improve the company's reputation. Wu and Wang (2014) investigated how the perception of CSR affected brand attitude and willingness to buy. Results of their study confirmed a positive effect of CSR activities on consumers' brand attitudes.

## 2.3. Economic Responsibility

In every society, business units meet the needs of consumers and in this way receive profit from their activity (Carroll, 1991). Companies use their profits to buy raw materials and try to attract investors; their survival depends on profitability. As a result, if these units cannot earn enough profit, their survival will be threatened (Carroll, 2016). Since every company must ensure its continued existence by being profitable, according to Carroll (2016), economic responsibility is the first dimension of CSR to economic responsibility. The main goal of economic responsibility is closed related to economic growth (Palihawadana, Oghazi & Liu, 2016; Han et al., 2020).

## 2.4. Legal Responsibility

Legal responsibility refers to the company's obligation to observe regulations (Schwartz & Carroll, 2003; Carroll, 2016; Kim et al., 2020; Uhlig, Mainardes & Nossa, 2020). Furthermore, in respect of CSR, a responsible company or organisation accepts these rules as fair game (Brin & Nehme, 2019). Although there is limited research with the prime focus on this second level of Carroll's pyramid, both legal and economic responsibility demonstrate favourable influence on a company's financial marketing and organizational performance (Streimikiene & Ahmed, 2021).

## 2.5. Ethical Responsibility

Every society has unwritten norms and values that go beyond legal frameworks and ethically responsible businesses try to respect these norms and values (Edmondson & Carroll, 1999. In other words, moral responsibilities reflect society's expectations, which have not yet been formulated as law (Wagner-Tsukamoto, 2019). Furthermore, Ramesh et al. (2019) postulates that CSR has a considerable, and positive effect on brand image while researchers Lee et al. (2020) proved that ethical responsibility has a positive and significant effect on brand attitude.

## 2.6. Philanthropic Responsibility

Philanthropic responsibility refers to voluntary activities undertaken by companies that go beyond ethical considerations (Carroll, 2016; Hossain, Bashar & Noor, 2017) and in addition to helping society, improve the quality of people's lives (Carroll, 1979, 1991, 1999; Chen, Chen & Hussain, 2019). In other words, philanthropic responsibility refers to the degree to which the company's core values meet the philanthropic expectations of society (Lee et al., 2020). A study conducted by Ricks (2005) amongst 293 undergraduate students showed that corporate philanthropic activities maximized the association with corporate brands. Longo, Mura & Bonoli (2005) found that non-financial voluntary activities increased the company's image and reputation. Other studies show that the corporate image created by philanthropic initiatives could generate positive brand attitudes (Sen & Bhattacharya, 2001; Lii & Lee, 2012).

## 2.7. Environmental Responsibility

Environmental CSR is the effort of a company in relation to the integration of environmental concerns in its business as well as its interaction with stakeholders (Rashid, Khalid & Rahman, 2015). In other words, it is the company's contribution to the responsible environmental development of society without sacrificing its financial performance (Han, Yu & Kim, 2019). Bebbington, Larrinaga-González & Moneva-Abadía (2008) advocates that social and environmental performance is

an important element of the company's reputation. Thus, efforts to develop a positive brand image should be characterised by respect for the environment (Salmones, Crespo & Bosque, 2005). According to Poolthong & Mandhachitara (2009), the use of natural materials and environmentally friendly practices can make a positive connection with the brand. Ha (2017) argues that companies that actively carry out CSR activities, especially concerning their environmental responsibilities, are more likely to increase customer retention rates than other competitors, and also have a greater chance of promoting positive attitudes toward the company.

## 2.8.  Brand Image

According to Kim & Jang (2016), brand image refers to experiences that people have had with the company. Other authors suggest that the term can be understood as the overall impression left in the minds of the customers (Hu, Kandampully & Juwaheer, 2009; Jiang, Ramkissoon & Mavondo, 2016). Early on it was established that the most important assets for restaurant businesses are their brand name and what the brand represents (Kim & Kim, 2004). It can also be said that the image of a brand can be changed through various means (Lee et al., 2017). As a result, customers can be encouraged to choose a given brand over a competing brand (Han, Yu & Kim, 2019). Brand image is a source of brand credibility and reputation that influences consumer's intention to purchase that brand (Tariq et al., 2017). Ongoing studies advocate that brand image has a positive and significant effect on purchase intentions (Jalilvand & Samiei, 2012; Sharifi, 2014; Tariq et al., 2017; Ramesh et al., 2019).

## 2.9.  Brand Attitude

According to Ramesh et al. (2019), CSR can have a powerful impact on brand attitude. Brand attitude is generally used to foresee customers' purchase preferences and is an important factor affecting their willingness to buy products of a given brand and become its loyal customers (Chaudhuri, 1999; Burton et al., 1998). According to Shim et al. (2001), customers' favourable attitudes toward the brand of choice affect their evaluations of the a brand and encourage them choose it above other competing brands (Shim et al., 2001). Studies show that brand attitudes have a significant effect on customers' purchase intentions (Summers, Belleau & Xu, 2006; Wu & Lo, 2009; Lii & Lee, 2012; Abzari, Ghassemi & Vosta, 2014; Kudeshia & Kumar, 2017). Based on these instances, the quality of the service is crucial to influencing the purchase decision process and hereby can have an impact on customer retention particularly in restaurants (Lo, 2020; Slack et al., 2020; Bello, Jusoh & Nor, 2021).

## 3. The Hypotheses and the Conceptual Model

Based on the theoretical insights from the review of the literature on social responsibility, tourism, services, restaurant industry and consumer behaviour (Mohammed & Rashid, 2018; Ramesh et al., 2019; Lee et al., 2020), a conceptual model was proposed that captures relationships between different dimensions of CSR and brand image and brand attitude and between these two variables and purchase intentions.
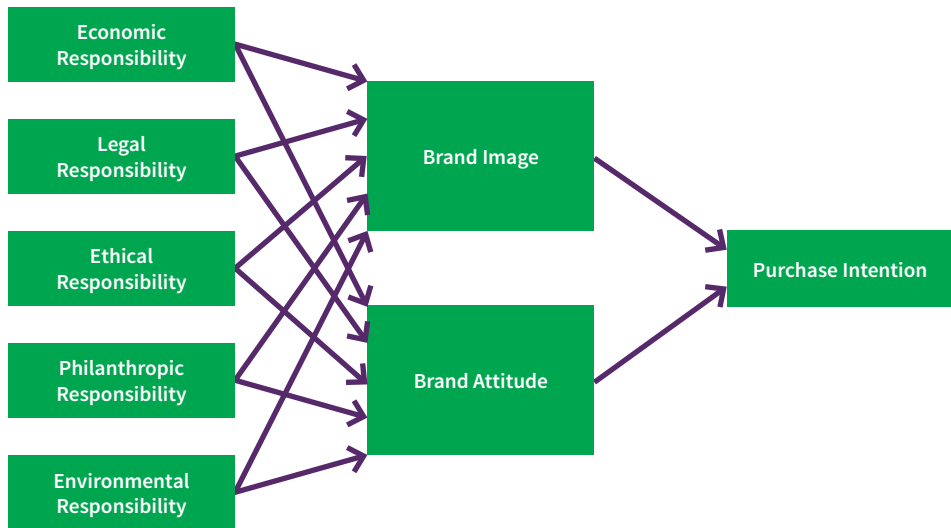


Figure 1. The conceptual model proposed in the study.
Source: Own research

The relationships shown in the model are expressed in the following research hypotheses:

H1. There is a positive and significant relationship between economic CSR and brand image.
H2. There is a positive and significant relationship between economic CSR and brand attitude.
H3. There is a positive and significant relationship between legal CSR and brand image.
H4. There is a positive and significant relationship between legal CSR and brand attitude.

H5. There is a positive and significant relationship between ethical CSR and brand image.

H6. There is a positive and significant relationship between ethical CSR and brand attitude.

H7. There is a positive and significant relationship between philanthropic CSR and brand image.

H8. There is a positive and significant relationship between philanthropic CSR and brand attitude.

H9. There is a positive and significant relationship between environmental CSR and brand image.

H10. There is a positive and significant relationship between environmental CSR and brand attitude.

H11. There is a positive and significant relationship between brand Image and purchase intention.

H12. There is a positive and significant relationship between brand attitude and purchase intention.

## 4. Research Method

### 4.1. Study Design

To measure a construct, multiple items must be used (Kline, 2015). A survey tool based on the existing literature was developed to measure the dimensions of CSR (Lee, Park & Lee, 2013; Palihawadana, Oghazi & Liu, 2016; Han et al., 2020). Most items referring to brand image, brand attitude and purchase intentions were borrowed from existing studies (e.g. Jalilvand & Samiei, 2012; Singh & Banerjee, 2018; Lee et al., 2020). All questionnaire items were evaluated using a five-point Likert scale, where 1 denoted "completely disagree:, 3 — "neither disagree nor agree", and 5 — "completely agree".

### 4.2. Sampling

A self-selected, non-probability sample was used in the study. An online questionnaire was developed, which could be accessed via a URL link. Snow ball sampling was used, whereby the link was distributed via email to friends, family and acquaintances with a request to forward it. E-mail recipients were free to complete

the online questionnaire at their own convenience or opt out. Each respondent needed to have visited a restaurant at least once in the recent months in the city of Tehran, Iran. 417 questionnaires were collected from Iranian customers. Nunkoo and Ramkissoon (2012) and Nunkoo, Ramkissoon & Gursoy (2013) indicated a number of essential aspects that researchers need to take into consideration when using SEM, such as, the two-step approach to SEM, reliability and validity, model fit evaluation indices, multivariate normality, post-hoc modifications, decomposition effects and sample size. The size of the sample is determined in the light of recommendations for SEM (Hair, Anderson & Tatham, 2010; Kline, 2015) and studies further indicated that a sample of larger than 200 is acceptable (Bagozzi & Yi, 2012; Stylidis, Sit & Biran, 2016). Thus, the sample achieved for this study was considered appropriate for the analysis that followed.

### 4.3. Data Analysis

The statistical analysis consisted of confirmatory factor analysis (CFA) and structural equation modelling (SEM) to test the conceptual model. The data were analysed using SPSS version 21 and AMOS version 24 software. The SPSS program was only used to enter the data into the AMOS program and to calculate Cronbach's alpha. Since the conditions of this study required the use of covariance-based SEM, AMOS is was used for the SEM, path analysis, and confirmatory factor analysis.

The data analysis was conducted in two stages. The first one involved CFA in order to estimate the dimensions. CFA is a statistical technique used to verify the factor structure of a set of observed variables. CFA is often the analytic tool of choice for developing and refining measurement instruments, evaluating the fit of the measurement model and verification of the construct fit indices, assessing construct reliability and validity, and identifying method effects (Anderson & Gerbing, 1988; Jackson, Gillaspy & Purc-Stephenson, 2009; Brown, 2015). The second stage included SEM analysis to test the hypotheses and the model fit.

## 4.4.  The Sample

Table 1 shows the demographic information of survey respondents.

Table 1. Demographic characteristics of respondents

| Total (n = 417) | | |
|---|---|---|
| | Number of respondents | Percentage (%) |
| Sex | | |
| Male | 214 | 51.3 |
| Female | 203 | 48.7 |
| Age | | |
| Under 20 | 21 | 5.0 |
| 20–29 | 181 | 43.4 |
| 30–39 | 193 | 34.5 |
| 40–49 | 47 | 11.3 |
| 50 or older | 27 | 6.5 |
| Education | | |
| Diploma | 56 | 13.4 |
| Bachelor's Degree | 155 | 37.2 |
| Master's Degree | 189 | 45.3 |
| Doctorate | 17 | 4.1 |

Source: Own research

## 5.  Results

### 5.1.  Measurement Model Evaluation

Before evaluating the proposed conceptual framework, the measurement model was evaluated using confirmatory factor analysis. The results of the measurement model test showed a good fit to the data: ($\chi^2$ = 554.430, df = 230, p = 000, $\chi^2$/df = 2.211, RMSEA = 0.054, PNFI = 0.730, GFI = 0.912, AGFI = 0.882, CFI = 0.941, IFI = 0.942, TLI = 0.928). Detailed CFA results are presented in Figure 2.

Table 2 shows factor loadings and values of Cronbach's α, composite reliability (CR) and average variance extracted (AVE). As can be seen, the standardized factor loadings of the measurement model are all statistically significant and higher than 0.5, the threshold value recommended by Hair et al. (2014). Cronbach's alphas
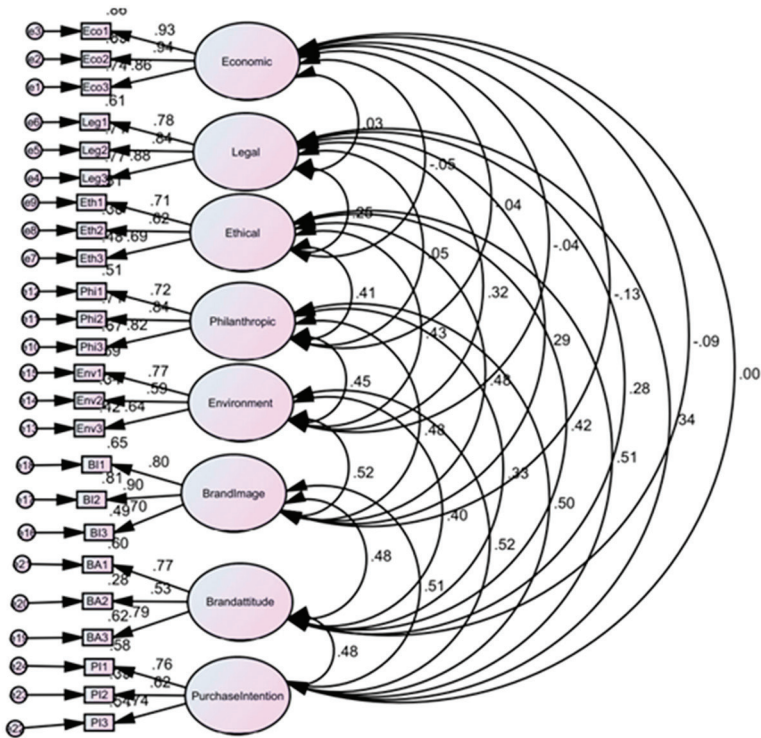
Figure 2. Results of confirmatory factor analysis
Source: Own research

are also greater than 0.70, which are higher than the threshold recommended by Fornell and Larcker (1981). Based on Hair et al. (2014), CR values above 0.7 indicate a high level of internal consistency, which is true for all values in the table. According to Chin (1998) and Hair et al. (2017), to achieve an acceptable level of convergent validity, the AVE of each latent construct should be greater than or equal to 0.50. As can be seen, the AVE of 7 variables are higher than 0.5, except for ethical variable, which is less than 0.5. Based on Fornell and Larcker (1981), if AVE is less than 0.5, but composite reliability is higher than 0.6, convergent validity of the construct is acceptable. So, convergent validity of the construct is acceptable.

Table 2. Properties of the measurement model (n = 417)

| Measurement items | Factor loading | α | CR | AVE |
|---|---|---|---|---|
| Economic responsibility (Han et al., 2020) | | 0.935 | 0.987 | 0.880 |
| It is important for this restaurant to be committed to being as profitable as possible. | 0.928 | | | |
| It is important for this restaurant to maintain a strong competitive position. | 0.944 | | | |
| It is important for this restaurant to be defined as one that is consistently profitable | 0.860 | | | |
| Legal responsibility (Han et al., 2020) | | 0.872 | 0.955 | 0.752 |
| It is important for this restaurant to perform in a manner consistent with the expectations of government and law. | 0.779 | | | |
| It is important for this restaurant to be defined as one that fulfils its legal obligations. | 0.843 | | | |
| It is important for this restaurant to provide goods and services that at least meet minimal legal requirements. | 0.880 | | | |
| Ethical responsibility (Han et al., 2020) | | 0.715 | 0.898 | 0.430 |
| It is important for this restaurant to perform in a manner consistent with expectations of societal mores and ethical | 0.714 | | | |
| It is important for this restaurant to prevent ethical norms from being compromised to achieve corporate goals. | 0.618 | | | |
| It is important for this restaurant to be defined as good corporate citizenship and known as who does what is expected morally or ethically. | 0.691 | | | |
| Philanthropic responsibility (Han et al., 2020) | | 0.830 | 0.949 | 0.675 |
| It is important for this restaurant to perform in a manner consistent with the philanthropic and charitable expectations of society. | 0.717 | | | |
| It is important for this restaurant to allocate some of its resources to philanthropic activities (e.g. fine/performing arts and sports). | 0.842 | | | |
| It is important for this restaurant to assist voluntarily with those projects that enhance a community's "quality of life. | 0.816 | | | |
| Environmental responsibility (Han et al., 2020) | | 0.709 | 0.902 | 0.559 |
| It is important for this restaurant to perform in a manner consistent with protecting the environment. | 0.765 | | | |
| It is important for this restaurant to offer environmentally friendly products/services. | 0.585 | | | |
| It is important for this restaurant to make every effort to protect and preserve the environment. | 0.645 | | | |
| Brand image (Jalilvand & Samiei, 2012) | | 0.789 | 0.805 | 0.329 |
| In comparison to other restaurant, this restaurant has high quality. | 0.760 | | | |
| This restaurant has a rich history. | 0.741 | | | |
| Customers (we) can reliably predict how this restaurant will perform. | 0.737 | | | |
| Brand attitude | | 0.737 | 0.923 | 0.592 |

| Measurement items | Factor loading | α | CR | AVE |
|---|---|---|---|---|
| For me, eating at this restaurant is valuable (Ajzen, 1991; Lee et al., 2020) | 0.774 | | | |
| For me, eating at this restaurant is very useful (Singh & Banerjee, 2018) | 0.533 | | | |
| For me, eating at this restaurant is very favourable. (Singh & Banerjee, 2018) | 0.788 | | | |
| Purchase intentions | | 0.752 | 0.913 | 0.567 |
| This place will be my first choice when it comes to choosing a restaurant.(Lee et al., 2020) | 0.763 | | | |
| I am willing to recommend eating at this restaurant to others (Jalilvand & Samiei, 2012) | 0.623 | | | |
| I intend to eat at this restaurant in the future (Jalilvand & Samiei, 2012) | 0.738 | | | |

Source: Author's own compilation

Table 3 presents results regarding the evaluation of discriminant validity. The root AVE of each hidden variable (bold diagonal values) is higher than the correlation of hidden variables (non-bold diagonal values). As a result, according to Fornell and Larcker (1981), discriminant validity is acceptable.

Table 3. Results of discriminant validity evaluation

| | ECO | LEG | ETH | PHIL | ENV | BI | BA | PI |
|---|---|---|---|---|---|---|---|---|
| ECO | 0.938 | | | | | | | |
| LEG | −0.031 | 0.867 | | | | | | |
| ETH | 0.053 | −0.250 | 0.656 | | | | | |
| PHIL | 0.038 | −0.053 | −0.408 | 0.822 | | | | |
| ENV | 0.038 | −0.318 | −0.426 | −0.450 | 0.748 | | | |
| BI | 0.132 | −0.294 | −0.481 | −0.484 | −0.517 | 0.798 | | |
| BA | 0.086 | −0.284 | −0.416 | −0.330 | −0.404 | −0.484 | 0.770 | |
| PI | −0.002 | −0.340 | −0.505 | −0.504 | −0.518 | −0.513 | −0.482 | 0.753 |

Note. ECO = economic CSR; LEG = legal CSR; ETH = ethical CSR; PHIL = philanthropic CSR; ENV = Environmental CSR; BI = Brand Image; BA = Brand Attitude; PI = Purchase Intention
Source: Own research

Table 4 shows results of discriminant validity evaluation using heterotrait-monotrait ratio of correlations (HTMT). According to Henseler, Ringle & Sarstedt (2015), values of HTMT greater than 0.90 indicate a lack of discriminant validity. As can be seen, all values in the table are lower than this threshold.

Table 4. Results of discriminant validity evaluation using heterotrait-monotrait ratio of correlations (HTMT)

|       | ECO    | LEG   | ETH   | PHIL  | ENV   | BI    | BA    | PI |
|-------|--------|-------|-------|-------|-------|-------|-------|----|
| ECO   |        |       |       |       |       |       |       |    |
| LEG   | −0.010 |       |       |       |       |       |       |    |
| ETH   | −0.066 | 0.518 |       |       |       |       |       |    |
| PHIL  | 0.071  | 0.232 | 0.392 |       |       |       |       |    |
| ENV   | 0.042  | 0.000 | 0.386 | 0.379 |       |       |       |    |
| BI    | −0.118 | 0.490 | 0.521 | 0.364 | 0.307 |       |       |    |
| BA    | 0.009  | 0.434 | 0.574 | 0.401 | 0.369 | 0.583 |       |    |
| PI    | −0.109 | 0.259 | 0.451 | 0.249 | 0.329 | 0.512 | 0.542 |    |

Note. ECO = economic CSR; LEG = legal CSR; ETH = ethical CSR; PHIL = philanthropic CSR;
ENV = Environmental CSR; BI = Brand Image; BA = Brand Attitude; PI = Purchase Intention
Source: Own research

## 5.2. Hypotheses Testing and the Structural Equation Model

After identifying a suitable measurement model, the relationships between the variables in the proposed model were tested using structural equation modelling. The maximum likelihood estimation results provided a good fit with the data: ($\chi^2$ = 554.430, df = 230, p < 0.05, $\chi^2$/df =2.211, RMSEA = 0.058, PNFI = 0.739, GFI = 0.902, AGFI = 0.872, CFI = 0.930, IFI = 0.931, TLI = 0.916). The fitting values of these indices are all within an acceptable range based on Hair et al. (2014). The results, shown in Table 5 and Figure 3, indicate that the proposed model is consistent with the experimental data. Absolute model fit was analysed in terms of three main indices: Chi-Square, RMSEA, and GFI.

Table 5. Results of structural equation modelling (n = 417)

| Paths | Standardized coefficients | t-value | p-value | Hypotheses |
|-------|--------------------------|---------|---------|------------|
| Hypothesis 1. Economic CSR positively and significantly affects brand image | −0.099 | −2.235 | 0.025 | Not Supported |
| Hypothesis 2. Economic CSR positively and significantly affects brand attitude. | −0.061 | −1.199 | 0.231 | Not Supported |
| Hypothesis 3. Legal CSR positively and significantly affects brand image. | 0.149 | 2.927 | 0.003 | Supported |
| Hypothesis 4. Legal CSR positively and significantly affects brand attitude.. | 0.169 | 2.849 | 0.004 | Supported |
| Hypothesis 5. Ethical CSR positively and significantly affects brand image. | 0.240 | 3.704 | 0.000 | Supported |
| Hypothesis 6. Ethical CSR positively and significantly affects brand attitude. | 0.263 | 3.487 | 0.000 | Supported |

| Paths | Standardized coefficients | t-value | p-value | Hypotheses |
|---|---|---|---|---|
| Hypothesis 7. Philanthropic CSR positively and significantly affects brand image | 0.273 | 4.514 | 0.000 | Supported |
| Hypothesis 8. Philanthropic CSR positively and significantly affects brand attitude | 0.140 | 2.033 | 0.042 | Supported |
| Hypothesis 9. Environmental CSR positively and significantly affects brand image | 0.264 | 3.795 | 0.000 | Supported |
| Hypothesis 10. Environmental CSR positively and significantly affects brand attitude | 0.217 | 2.745 | 0.006 | Supported |
| Hypothesis 11. Brand image positively and significantly affects purchase intentions. | 0.391 | 6.260 | 0.000 | Supported |
| Hypothesis 12. Brand attitude positively and significantly affects purchase intentions | 0.352 | 5.337 | 0.000 | Supported |

Note. R-square ($R^2$): Brand Attitude (0.325); Brand Image (0.459); Purchase Intention (0.381)
Source: Own research

Based on values of standardized coefficients, t-values and p-values in Table 5 and Figure 3, economic CSR was not found to have a significant effect on brand image ($\beta = -0.099$, $p < 0.05$), or brand attitude ($\beta = -0.061$, $p > 0.05$), which means that hypotheses 1 and 2 need to be rejected. Legal CSR was found to have a significant effect on brand image ($\beta = 0.149$, $p < 0.05$) and brand attitude ($\beta = 0.169$, $p < 0.05$), which means that hypotheses 3 and 4 can be accepted. Ethical CSR was also found to a significant effect on brand image ($\beta = 0.240$, $p < 0.05$), and brand attitude ($\beta = -0.263$, $p < 0.05$), so hypotheses 5 and 6 can be accepted. Philanthropic CSR was found to have a significant effect on brand image ($\beta = 0.273$, $p < 0.01$), and on brand attitude ($\beta = 0.140$, $p < 0.05$), so hypotheses 7 and 8 can be accepted. Environmental CSR has a significant effect on brand image ($\beta = 0.264$, $p < 0.05$) and brand attitude ($\beta = 0.217$, $p < 0.05$). These results support hypothesis 9 and 10. Brand image has a significant effect on purchase intention ($\beta = 0.391$, $p < 0.05$) and as a result hypothesis 11 is supported. Finally, brand attitude has a significant effect on purchase intention ($\beta = 0.352$, $p < 0.05$), and as a result, hypothesis 12 is supported.

Table 5 above notes that the R-squared value for brand attitude is 0.325, which means that the five dimensions of CSR explain 32.5% of the variance in the brand attitude construct, while the remaining 67.5% can be attributed to the influence of variables not accounted for in this study. The R-squared value for brand image is 0.459 , which means that the five dimensions of CSR explain 45.9% of the variance in the brand image construct, while the remaining 54.1% can be attributed to the influence of variables not accounted for in this study. The R-squared value for purchase intention is 0.381 , which means that the five dimensions of CSR explain

32.5% of the variance in the purchase intention construct, while the remaining 61.9% can be attributed to the influence of variables not accounted for in this study.
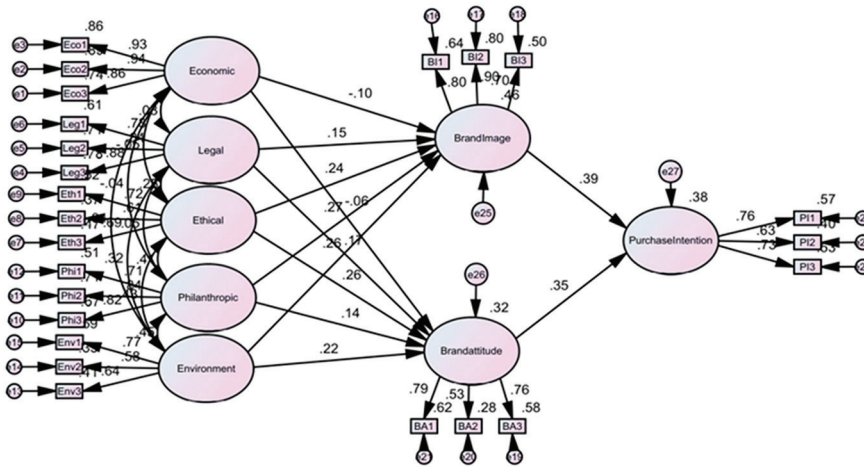


Figure 3. Results of structural equation modelling
Source: Own research

## 6. Discussion and Conclusion

The purpose of the study was an verify a model representing how the dimensions of CSR affect brand image, brand attitude and purchase intentions. The model is supposed to give a better understanding of the behaviour of customers who have visited restaurants in Iran based on their perceptions of these dimensions of CSR. The findings indicate that economic CSR does not significantly improve brand image and brand attitude. It can be argued that if customers feel that restaurants pay too much attention to profitability, they may have a negative attitude towards these restaurants. As a result, the image of restaurant brands is likely to be damaged, which can ultimately make customers less willing to visit such restaurants. This contradicts the findings of Lee et al. (2020), which showed that economic CSR has a significant impact on brand attitude. In contrast, the other dimensions of CSR were found to significantly improve brand image and brand attitude. With respect to legal responsibility, restaurant customers expect their managers and employees to comply with regulations in their activities. Ethical CSR is the broadest dimension of corporate social responsibility, and customers expect restaurants to actively meet ethical expectations when doing business. This is consistent with the findings of

Lee et al. (2020) which showed that ethical CSR has a significant impact on brand attitude. Results regarding philanthropic CSR indicate that customers show more appreciation for restaurants that are involved in philanthropic activities. This is also consistent with the findings of ongoing research that proved that philanthropic CSR has a significant impact on brand attitude (Sen & Bhattacharya, 2001; Lii & Lee, 2012; Lee et al., 2020).

Results concerning environmental CSR indicate that restaurant customers are also concerned about environmental issues. This is consistent with findings reported in the literature. Today, more people pay attention to environmental issues and expect companies to do the least damage to the environment. This is also consistent with the findings Han, Yu & Kim (2019).

Brand image and brand attitude were also found to significantly increase respondents' purchase intentions, which is consistent with the findings of Lee and Lee (2018) and those reported by Ramesh et al. (2019).

## 7. Implications

### 7.1. Theoretical Contribution

This study has the several theoretical implications. It supports the relationship between CSR dimensions (legal, ethical, philanthropic and environmental) on the one hand and brand image and brand attitude on the other. Additionally, the findings support the existence of a mediating relationship between CSR dimensions and purchase intentions. In other words, the results contribute to the literature on CSR and its impact on consumer relationships with the brand.

In addition, recent studies conducted within the restaurant industry that investigated the impact of CSR on brand image and brand attitude excluded the impact of specific CSR dimensions. Therefore, the results of this study provide an indication as to which aspects of CSR can affect brand image and brand attitude and, ultimately, purchase intentions. Moreover, despite having theoretical contributions to the relationship between CSR and brand equity in multiple service contexts, there has been little empirical research on the effects of CSR on brand image and brand attitude and purchase intentions in relation to the restaurant industry.

Furthermore, most studies have included only four dimensions CSR (economic, legal, ethical, and philanthropic) and in most of them, the environmental dimension was analysed and discussed as an element of ethical CSR. In our study, en-

vironmental csr was treated as a separate dimension, which is a novelty in the literature focused on the relationship between csr dimensions, brand image, brand attitude, and purchase intentions in the restaurant industry. Finally, the study was conducted in a developing and predominantly Muslim country, so the results can provide new insights.

## 7.2. Managerial Implications

Given that the study investigated the impact of csr on customers' purchase intentions, its results provides useful insights for restaurant managers. For example, the study questions the existence of a significant relationship between economic csr and brand image and brand attitude. It seems that these respondents were not interested in restaurants that pay too much attention to profitability and expected restaurants to focus on other dimensions of csr. This fact should be taken into account by managers, employees of restaurants.

Secondly, this study shows the importance of compliance with regulations, as legal csr was found to significantly improve restaurants' brand image and customers' attitudes to the brand.

Thirdly , the respondents expected restaurants to obey social moral norms. Adherence to ethical principles was also found to have a positive effect on the brand image and customers' attitudes and, consequently, on their willingness to eat at such restaurants.

Fourth, restaurants can also benefit from participating in philanthropic activities. Therefore, restaurant managers should use the fact of being involved in such activities as an element of their advertising strategies.

Finally, the study confirms the importance of environmental responsibility. The results of the survey indicated that Iranian respondents are aware of and pay attention to this topic and expect restaurant managers to operate with the least negative effects on the environment.

## 7.3. Limitations of the Study and Directions of Future Research

The main limitation of the study is the fact it is based on a non-random sample of restaurant customers in Teheran, which means its results cannot be generalised to all Iranian restaurant customers in the capital, let alone in the whole country. Secondly, the study only concerns the restaurant industry, so any attempts to apply these findings to other industries (even those related to tourism and hospitality) should be treated with caution.

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## Wpływ działań CSR na wizerunek restauracji i stosunek klientów do marki na podstawie ich intencji zakupowych

**Streszczenie.** Celem przedstawionego badania było określenie różnych wymiarów społecznej odpowiedzialności biznesu (CSR), które wpływają na wizerunek restauracji i stosunek klientów do danej marki, jak również ocena wpływu tych dwóch zmiennych pośredniczących na intencje zakupowe klientów. Badanie opiera się na danych z ankiet wypełnionych przez 417 klientów restauracji w Teheranie. Do przetestowania zaproponowanego modelu koncepcyjnego wykorzystano modelowanie równań strukturalnych (SEM). Z analizy wynika, że ekonomiczny wymiar CSR jest odwrotnie skorelowany z wizerunkiem marki i stosunkiem klientów do marki, chociaż związek ten nie jest istotny statystycznie. Oznacza to, że jeśli klienci mają wrażenie, że restauracje przywiązują zbyt dużą wagę do rentowności, mogą mieć do nich stosunek negatywny. Stwierdzono, że pozostałe wymiary CSR (prawny, etyczny, filantropijny i środowiskowy) mają pozytywny wpływ na wizerunek restauracji i stosunek klientów do danej marki, co przekłada się na większą skłonność do korzystania z jej usług. Dlatego właściciele restauracji powinni zdawać sobie sprawę z różnych implikacji działań w zakresie społecznej odpowiedzialności biznesu i wybierać te z nich, które mają szansę poprawić wizerunek restauracji i być pozytywnie odebrane przez ich klientów.

**Słowa kluczowe:** społeczna odpowiedzialność biznesu, wizerunek marki, postawa marki, intencja zakupowa
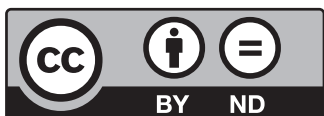
**REFILOE JULIA LEKGAU[a], TEMBI MALONEY TICHAAWA[b]**

# Dynamic Changes and Recovery in Event Venues: Perspectives from MICE Event Planners and Venue Managers

**Abstract.** The study examines the role played by event venues in helping the MICE event industry in South Africa recover from the Covid-19 pandemic, adapt to new conditions and innovate. The analysis is based on qualitative data collected during in-depth interviews with MICE event venue suppliers and planners. It was found that a crucial first step in order to reopen these venues was to ensure compliance with safety regulations. In response to the quick shift to virtual and hybrid events, many venues implemented necessary upgrades to accommodate such forms of participation. A number of event planners also considered using multiple venues to host large-scale events. The crisis caused by the pandemic re-emphasised the importance of alternative event venues and outdoor spaces. The study has implications for MICE event planners and suppliers.

**Keywords:** hybrid event, MICE events, South Africa, suppliers, venues, virtual event

## 1. Introduction

Events are increasingly playing a role in destination development (Lu, Zhu & Wei, 2020). Recognised as a core part of the tourism system (Getz & Page, 2016), the events industry had experienced tremendous growth before the pandemic. According to Allied Market Research (2020), the industry was valued at US$ 1.135 billion in 2017. Events contribute to job creation, community development, and urban development resulting from the construction of event infrastructure and generate revenue for local economies (Christofle & Fournier, 2023; Kramer et al., 2023;

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Nyikana & Tichaawa, 2023). Consequently, there is much competition between destinations to host large-scale and international events (Nolan, 2020; Welthagen, Slabbert & du Plessis, 2022). The growth of the events industry has also attracted a lot of research interest, according to Mair and Smith (2021), event management research has become a maturing field of study that critically examines events as social, economic, cultural, environmental, and political phenomena. One area of focus is the growing popularity of virtual (and hybrid) events, initiated during the COVID-19 pandemic (Hofstädter-Thalmann et al., 2022; Lekgau & Tichaawa, 2022a, 2022b; Steriopoulos & Wrathall, 2021). Authors interested in this emerging field of research are investigating how these new forms of participation are changing the hosting of events and tourism and hospitality and how they are perceived by different stakeholders (Saarinen & Rogerson, 2021; Tichaawa & Rogerson, 2022). The following study focuses on the meetings, incentive travel, conference, and exhibition (MICE) sector.

While events used to be associated with people coming to a specific place, recent advances in video conferencing technology (which became particularly useful during the pandemic) transformed events into location-independent and complex social networks (Simons, 2019). Given the growing popularity of virtual and hybrid events, it is necessary to explore this phenomenon from different perspectives to gain new insights about event management. To date, a few studies on virtual and hybrid events have attempted to examine the experiences of attendees of such events (Hofstädter-Thalmann et al., 2022; Pearlman & Gates, 2010; Simons, 2019; Sox et al., 2017; Steriopoulos & Wrathall, 2021) and their willingness to pay fees for virtual attendance (An, Kim & Hur, 2021). The following study focuses on the supply side and investigates changes taking place in event venues and perspectives of stakeholders who shape and are affected by these changes. Event venues are crucial factors that play a major role in the success of any event (Adongo, 2011; Lee, Parrish & Kim, 2015; Wenner, Caset & De Wit, 2019). Adongo (2011) points out that while all MICE stakeholders work together to enable the sector's operation and growth, event venues play a central role. Event venues were among those most hit by pandemic restrictions. Like elsewhere in the world, national lockdowns in South Africa limited normal operations of the MICE sector (Bartis, Hufkie & Moraladi, 2021). The country adopted an alert level system to manage the gradual reopening of economic sectors. Unfortunately, event venues were generally limited to 50–250 persons indoors, and 50% of capacity for outdoor spaces, depending on the alert level (Lekgau & Tichaawa, 2022c). This led to the cancellation of many MICE events and the quick shift to virtual events (Bartis, Hufkie & Moraladi, 2020; Lekgau & Tichaawa, 2022a). The purpose of the following study is therefore to examine

changes that took place in MICE event venues during the pandemic, and the transformation of the sector after the pandemic crisis.

The study contributes to event management literature on venues. The majority of research on event venues has considered them as one of the selection criteria used by meeting planners (Mair, 2010; Welthagen, Slabbert & du Plessis, 2022), with a focus on attributes of conference facilities (Elston & Draper, 2012; Lee, Parrish & Kim, 2015; Nolan, 2020). A few studies have examined venues in terms of sustainability (Mair & Jago, 2010, Orthodoxou et al., 2021; Wenner, Caset & De Wit, 2019; Whitfield, Dioko & Webber, 2014). Most of these studies concentrated the perspectives of event planners or attendees. In contrast, this study investigates event venues, their ability to adapt to the pandemic crises and the resulting evolution of event participation.

## 2.  Literature Review

As the world is becoming increasingly connected, the MICE sector is growing rapidly (Orthodoxou et al., 2021). Business tourism associated with the MICE sector plays a vital role in the global travel and tourism industry (Hooshmand et al., 2023; Mair & Smith, 2021; Zhou, 2021). MICE tourism has grown to become one of the most lucrative forms of tourism globally (Suwannasat et al., 2022). Substantial economic benefits of this tourism segment have captured the attention of governments worldwide and generated competition between venues interested in hosting such events (Marais, du Plessis & Saayman, 2017; Nolan, 2020). Before the pandemic, the MICE sector contributed US$ 1.5 trillion to the global GDP (Hooshmand et al., 2023). In an effort to capture MICE markets destinations have made significant investments to support the growth of this sector (Suwannasat et al., 2022; Zhou, 2021). This is evident in the construction of purpose-built MICE venues and the expansion of conference and meeting rooms in existing accommodation facilities (Rogerson, 2015, 2018; Zhou, 2021).

Much of the MICE tourism literature is devoted to the study of destination competitiveness (Elston & Draper, 2012; Lee, Lee & Joo, 2015; Nolan, 2020; Welthagen, Slabbert & du Plessis, 2022) and the role played by MICE event venues. According to Elston and Draper (2012), research on this topic dates back to the 1990s, with Nolan (2020) acknowledging Fortin and Ritchie's research (1977) as the first to conceptualise the site selection process in association conferences. Generally, the literature lists a number of factors that make destinations attractive venues to host events, such as accessibility, proximity to key tourism services, capacity, infrastruc-

ture and amenities, and ambiance and aesthetics (Cassar, Whitfield & Chapman, 2020; Elston & Draper, 2012; Lee, Lee & Joo, 2015; Nolan, 2020; Rogerson, 2018; Wenner, Caset & De Wit, 2019).

A few attempts have been made to examine developments in MICE event venues to meet the changing needs of the MICE sector. Authors of these studies point out that MICE planners are increasingly trying to diversify venue options by exploiting unique and non-traditional spaces to provide memorable experiences for their clients and event attendees (Lee, Parrish & Kim, 2015; Wenner, Caset & De Wit, 2019; Whitfield, 2009). According to Whitfield (2009), a growing number of visitor attractions in the UK were starting to offer conference and event facilities. Lee, Parrish & Kim (2015) report a similar trend in the case of sport stadiums in the UK, adding that while these facilities can provide glamorous and unique experiences, they are at a disadvantage when it comes to aspects such as audio-visual equipment, food and beverage services and pricing structures. These studies provide another dimension to understand the role of venues (both purpose-built and potential) in the MICE sector.

## 3. The Development of MICE Tourism in South Africa: An Overview

South Africa has emerged as a prominent destination for business events, leveraging its diverse offerings, infrastructure, and natural beauty (Marais, du Plessis & Saayman, 2017). Business tourism contributes significantly to the growth of tourism in South Africa (Bartis, Hufkie & Moraladi, 2021; Donaldson, 2013). Indeed, the country's international rankings as a MICE destination, coupled with the individual rankings of cities highlight the importance of MICE tourism for the nation's overall economic development (Marais, du Plessis & Saayman, 2017). According to Zhou (2021), South Africa is the only African destination with four cities (Cape Town, Johannesburg, Durban and Tshwane) ranked among the top ten MICE cities of the International Congress and Convention Association (ICCA). Available studies highlight the direct and indirect economic benefits of MICE tourism, including revenue generation, job creation, and increased investments (Bartis, Hufkie & Moraladi, 2021; Marais, du Plessis & Saayman, 2017; Rogerson, 2018). The sector fosters the growth of local businesses, stimulates the hospitality industry, and drives regional development through infrastructure improvements (Bartis, Hufkie & Moraladi, 2021; Rogerson, 2015). As a result, the importance of this form of tourism has been recognized by the national government, which is reflected by

policy and consultancy documents and the establishment of the National Conventions Bureau (Donaldson, 2013; Marais, du Plessis & Saayman, 2017; Rogerson, 2015). According to Rogerson (2015), these developments have helped to improve the position of South Africa as an international MICE destination.

The growth of MICE tourism in South Africa can be attributed to several factors, including (but not limited to) the role of Johannesburg as a gateway to other African destinations. The city is home to the headquarters of many international companies and associations, and has invested much in improving accommodation and transportation infrastructure, especially in the infrastructure to host business events (e.g. convention centres) (Donaldson, 2013; Marais, du Plessis & Saayman, 2017; Rogerson, 2015; Zhou, 2021). In an effort to develop the MICE market, several provincial tourism bodies (e.g. provincial convention bureaus) have also built international convention centres. In 2003, the city of Cape Town collaborated with the Western Cape government in order to build the Cape Town International Convention Bureau, which has since made a substantial contribution to the national economy (Cape Town International Convention Centre, 2022). Much earlier, in 1997, a similar initiative led to the establishment of the Durban International Convention Centre (Durban International Convention Centre, 2022). In addition to these purpose-built convention venues, the main MICE cities (Cape Town, Johannesburg, Durban and Tshwane) have a diverse range of venue options for MICE events. The following sections are devoted to a study of venues located in Cape Town and Johannesburg.

## 4. Research Method

Since the main purpose of this study was to examine changes implemented in MICE event venues as a result of the pandemic, the following analysis is based on qualitative data about strategic decisions taken by MICE venue managers and event organisers to ensure that these physical spaces continued to operate during a period when the MICE sector had largely switched to virtual participation. An exploratory approach was adopted in order to examine the adaptation process as the MICE sector started to recover. A purposive sample of respondents was selected to participate in interviews, representing various experiences and backgrounds in the South African MICE sector. 19 interviews were conducted from March to June 2021, when attendance in indoor venues was restricted to 100 people and in outdoor venues — to 250 (Lekgau & Tichaawa, 2022c). The sample of interviewees (Table 1) included professional conference organisers (PCO), exhibition

and trade show organisers, representatives of national (and provincial) convention bureaus, managers of convention centres, conference venues, suppliers of audio-visual equipment, government representatives and members of trade associations, namely the Southern African Association of the Conferences Industry (SAACI), the International Congress and Convention Association (ICCA), the Association of African Exhibition Organisers (AAXO), Society for Incentive Travel Excellence (SITE) and the Event Safety Council. These interviewees are located in two key MICE destinations in the country, Cape Town and Johannesburg. However, it is important to note that a number of these interviewees (aside from venue suppliers) conduct their MICE operations in both cities.

Table 1. Study participants

| Key informants | n |
|---|---|
| Tourism governing authority | 1 |
| Convention bureaus representatives | 3 |
| Industry associations representatives | 5 |
| Event organisers | 3 |
| Suppliers of audio-visual equipment | 2 |
| Venue suppliers | 4 |
| Exhibition stand supplier | 1 |
| Total | 19 |

Source: Authors

The interview questionnaire was developed after reviewing the literature on tourism crisis impacts, event changes during crises, and adaptability and change in event management. The interviewees were asked to speak about their experiences of adapting to the pandemic, changes that venues had to make and trends expected to emerge as the sector continued its recovery. The interviews, which lasted from 45 to 90 minutes, were recorded (with the permission of the participants). The recordings were transcribed using the Otter.ai software. Transcribed data were coded using the Atlas.ti software and grouped according to themes. Broad themes identified in the data are presented below.

# 5. Results

## 5.1. Change in Use of Venue Space

The first theme emerging from the data is the change in how event venue space was used. One important driver of this change was having to comply with pandemic regulations. When MICE event venues were reopened, assuring visitors of their health and safety was a priority. As a result, many venues across the country implemented safety protocols, such as temperature checks upon entry, sanitising stations, and social distancing measures. One conference centre manager said:

> A very important thing is we had to get up to speed with what the correct protocol was with regard to COVID compliance. Because the first and most important is that our clients needed to feel safe and secure when coming to our property. They needed to know that everything was correctly put in place that temperatures were taken, that there was an actual trail that we could follow, just in case somebody possibly tested positive, that we could then you know, approach everybody that had been in contact.

MICE event organisers agreed that compliance with COVID-19 protocols was considered as a factor when selecting venues for events. One convention centre manager said:

> I think when people or clients are looking to select a venue, I think, probably, the first and biggest question would be 'Do they have safety process processes in place? And are they COVID-19? compliant?'. I think that's number one. For any event organiser that wants to book an event venue, nowadays, the first thing is to make sure that the people coming to the conference will be safe.

Many interviewees emphasised the importance of ensuring sector-wide compliance with COVID-19 measures, with some industry association representatives acknowledging the importance of spreading this information and training to all organisations, regardless of membership. The implementation of such protocols is an example of adjustments undertaken by MICE venues. Both venue managers and event planners acknowledge the enhancement of safety procedures in venue processes and resources, as evidenced by the following quotes, one from a venue manager and the other from an event planner:

> I think there's been a huge change in how we plan events because ordinarily you would get all information on the client and the client would arrive and into their venue and

they would conference and it would be just seamless. Now, you have to advise them to come earlier because there's the COVID screening that needs to happen before they can get into the venue. And once they're in the building, they need to make sure that they are sanitised etc. And then make sure that the venue is sealed and when the client arrives, they know that that venue is now ready for them and that no one else has been in that venue. So it's being cleaned and sanitised and ready at each tea and coffee break or a refreshment break And when they go out, there has to be an area that is socially distanced. You now have to have a COVID compliance officer, making sure that when they come out they need to wear their masks, they need to avoid more than three people around the table, be 1.5 metres apart. And it's tough. It's as people it's not our norm to act this way. So I think it's more of ensuring [that] the clients understand what our processes are and how it's changed.

The biggest change will be the space that we use. But that ties into the safety element, and also the audio-visual that's booked. So it's not going to be the standard audio-visual that's booked anymore. And also the amount of delegates that you're allowed to have on-site. And we're going to have to make sure that there's the two metres between them, that if they can register, how many people are we going to allow into the registration area, how far away must there by space? How long? You know, we pretty much know we need so many staff to get through 1000 registrations, but that's going to double up because we're going to have to register so many more people. So we're going to have less where we could play to have 1000 coming to register. We're going to have say only 500 but we've got to get through that other 500 as well. So it's going to change staffing. It's going to change audio-visual is going to change the new capacities, how we use the venues, and it's going to effectively change health and safety as well. So it's going to be interesting.

 The transition to virtual and hybrid events caused a change in the way rooms and certain spaces in a given venue were used. According to some interviewees, virtual and hybrid events provide opportunities for more creativity in the preparation and selection of venues (and rooms); for example, more rooms and venue facilities can be turned into studios to host virtual events. A conference facility manager added:

So although it's a virtual event, the panellists are all coming to a studio. And that event is actually taking place at a hotel. So the studio is actually going to be in their sort of Gin bar. So then you also have your not-so-obvious conference venues that are also starting to convert some of these spaces into virtual studios.

The growing popularity of virtual and hybrid events had serious implications for venues, which is captured in another major theme concerning the upgrading of facilities in MICE event venues.

## 5.2.  The Upgrading of Event Facilities

The second major change observed in MICE event venues was the upgrading of venue facilities to accommodate and capitalise on the shift to virtual and hybrid events, such as the expansion of Wi-Fi capabilities, and turning rooms into green studios. Many interviewees agreed that virtual and hybrid participation would be a prominent feature of the MICE sector, even after in-person participation became possible again. These views are represented by the following quotes from a manager of an international convention centre and a representative of ICCA:

> And I think that from a — I think, from a technology point of view, probably the most important is that we provide state-of-the-art capabilities from a Wi-Fi point of view from a streaming point of view, from a bandwidth point of view to our clients, because I think as I said, it's the virtual component, it's going to be with us forever.

> A lot of venues on now, and have been since last year, because of the virtual component, are now converting one or two of the venues into a virtual studio with a whole green screen that the background and sort of maybe one or two permanent cameras in the venues. So although it's again, not the people coming in face to face, at least there is a little bit of revenue coming in for the venues. With the studios that they have. In Cape Town, we've got Cape Town International Convention Centre.

Efforts to upgrade facilities involved collaboration with other stakeholders in the sector, specifically suppliers of audio-visual equipment, as exemplified by the following quotes from a venue manager and a supplier of audio-visual equipment, respectively:

> So we very quickly had to learn about the virtual side of things, we had to make sure that our property was set up and collaborating with the correct company, like an IBTM, or Gearhouse Group or whoever, to be able to set up a virtual space, so that clients could actually still use our facility. And then when the hybrid elements allowed to be able to have X amount of people on our property and be able to stream out. So we very quickly had to adapt.

And we arranged online training and demos. And in partnership with various venues in in Cape Town, Joburg and Durban we actually set up studios and green rooms that would stay there for when lockdown restrictions are eased. And when, when we went to, I think it was level three, we then invited clients over to come and have a look so that they could experience this studio space.

It is important to acknowledge that facility upgrades were mainly made by medium to large-scale venues, especially international convention centres, which made considerable technological improvements. In contrast, smaller venues, which were able to host MICE events during the pandemic, without a huge loss (in comparison to larger venues), focused more on compliance with regulations. Some interviewees pointed out that since South Africa is a long-haul destination and international convention (and conference) centres want to attract international business participants, these newly acquired facility upgrades helped MICE organisers to select appropriate venues. For instance, a representative of the Cape Town International Convention Centre said:

So there will always be the hybrid component, but we're also doing live streaming during this time, for some reason, I don't know why. But we've even done a virtual site inspection. So if a client can't travel here to see the venue, we've created a platform where they can log in, and we can show them the venue, but it's going to be virtual. And then they get a sense of what the venue looks like, what it can have in it. And we sell the venue that way. And that way, we've actually won, you know, 12 International bids during lockdown. Because I think we had that option because people aren't going to buy what they don't see. So I think that was quite a good way of how we've changed our selling techniques as well.

This is consistent with the wider sector's plan to replenish the event pipeline and continue to bid for future events (Lekgau & Tichaawa, 2021a).

## 5.3.  Use of Multiple Venues and Destinations

The pandemic called for a rethinking of how to host events when the number of participants was restricted. MICE organisers were no longer able to host large-scale events in one venue with in-person participation. One of the solutions to this problem was the use of multiple venues and destinations. In this regard, a PCO said:

But what we were trying to do is convince corporates to still have their conference, but to use a couple of venues. So, to be able to use us, for example, and [to] have a regional

event, they fought for 20 or 30. And then for them to possibly have it at another venue in Cape Town, or [at] another one in Johannesburg and [to] have a bit of a hybrid, a hybrid space. The only problem with that is, it's incredibly costly.

The use of multiple venues allowed MICE organisers to host in-person events, with large numbers of delegates in attendance. However, hosting events in different locations within the country changes or even at a few locations in different countries is associated with extra costs. Some interviewees added that this approach was even more challenging and complex if the event was to be organised in a hybrid format. A trade show organiser said:

I think hybrid is going to potentially be the buzz. They are still struggling with [it] a little bit from a technical point of view. And, of course, multi destination [events are] even more difficult. If you've got a hybrid event with one main venue, it's not too bad. But when you start adding venues, typically, again, it becomes quite complicated. Because, let's say you do it in five different African countries, I actually have a client that was considering doing that. And we advised him against it, just from a technical point of view, it becomes very complex, besides the fact that you now need to pay … staff [at] five different venues, instead of one.

In the case of incentive travel, the interviewees pointed out it was not about using multiple venues or destinations, but rather booking out an accommodation facility. An incentive trip organiser considered:

But use small boutique hotels, where there's nobody else besides your group in the hotel. Use the smaller Safari lodges … [with] … eight to 12 rooms, and book it out exclusively. And, that way, you've also got that sense of security. You're not mingling with other people that you don't know where they've been. So that's the recommendation at the moment.

This approach was used as a contemporary solution for this subsector as it ensured minimal contact with other guests.

## 5.4.  Use of Alternative (Non-traditional) Event Spaces

The last theme emerging from the data was the use of alternative spaces for MICE events. This option was MICE organisers' response to the changing expectations of attendees. Indeed, the social and psychological effects of the pandemic have been widely recognised in the literature (Neuburger, & Egger, 2021; Rogerson, & Rog-

erson, 2021). One of the central concerns in the case of event organisation during the pandemic was the problem of ventilation. As a result, more consideration was given to outdoor venues. Further, interviewees involved in destination marketing noted that the brand of South Africa as a destination, which is closely associated with wildlife and wilderness landscapes, is an untapped opportunity for the country's MICE sector after the pandemic. The following quotes represent views of a destination marketing organisation and a conference association:

> One of the key insights was that South Africa is such an open destination, there's a lot of open spaces, and it is one of the few destinations that can actually answer to the COVID-19, regulations, around ventilation around being outdoors and hosting more events. That, there was that [international] appeal to say, 'Tell us what you can offer. Because we understand your open spaces, we understand that you can actually host' so if anything, this started pre-empting ideas for us to say, perhaps we need to then dial up, you know, what South Africa is known for openness, you know, a vast landscape that we can now start saying you can actually have a meeting right in front of a, right inside the Kruger National Park surrounded by, you know, surrounded by the big 5[1].

> In addition to that, there is also the choice of venue as well. The weather is improving in some parts of the country, and there is the opportunity that exists to find an outdoor venue, or venue that leads itself into nature, for instance. So there is an opportunity to consider that, and some venues in the city. And I think of the Convention Centre, some of the lobby areas or even the back end of the coffee sort of spaces can be utilised effectively. So on that basis, safety, definitely. But it's also the enhancement of the experience. And it's showing that you can meet outdoors, so from the South African perspective, that has sort of allowed people to look at where they choose the venues in the coming weeks or months and into the future as well.

Regarding the shift away from popular or well-known destinations to lesser-visited ones as alternative venues, a destination management company representative said:

> And it was we were shocked to say we saw that interest coming in from Mpumalanga. So people were more interested in Mpumalanga. There was mention of Cape Town, which has always been but, Mpumalanga has always been one of our least visited. So if you ask me 'Okay, urban life city life', they said, 'you know, what, because of the crowding, you

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[1] The phrase 'Big Five' refers to African lions, leopards, rhinoceros, elephants, and Cape buffalo. It is usually used to market safaris.

know, we are quite sceptical'. So can you see also now the population is starting to play a huge role. Also, things were slowly changing from what we know.

The above quotes illustrate opportunities emerging in the sector. The following section contains a critical discussion of these findings.

## 6. Discussion

The events industry, especially the MICE sector, is often described as being resilient to crises and change (Aburumman, 2020; Shereni Ncube & Mazhande, 2021; Wenner, Caset & De Wit, 2019). According to previous studies, this resilience can be linked to the sector's adaptability, collaboration, and innovation (Aburumman, 2020; Dillette & Ponting, 2020; Lekgau & Tichaawa, 2021a, 2022a). Studies such as Horne et al. (2022) point to the importance of examining supplier experiences and adaptability during periods of significant change and uncertainty. The responses presented in the previous section describe changes implemented and considered by MICE event venues. With the slow and gradual reopening of the events industry, one of the first priorities was to ensure the safety of event attendees. The focus was on minimising the transmission of the virus, according to guidelines developed by the Southern African Communications Industries Association in partnership with the South African Events Safety Council (Lekgau & Tichaawa, 2021b). The guidelines stipulated changes to be implemented at various stages of MICE event planning.

In addition to revising floor plans according to the protocols, the transition to virtual and hybrid formats required a number of adaptations in these venues, mainly the upgrading of audio-visual equipment as well as room conversion to green studios to enable the hosting of virtual events. In this way, venues' technical and digital capabilities came to be treated as competitive attributes (Adongo, 2011; Davidson, 2019; Mair, 2010; Nolan, 2020; Welthagen, Slabbert & du Plessis, 2022). According to Davidson (2019), the adoption of new technologies led to the transformation of the MICE sector. The interviews indicate that the facility upgrades were consistent with efforts to maintain the emerging international industry standards and gain a competitive position in the global MICE event market after the pandemic. Some studies have noted the importance of this aspect (Bueno, Urbistondo & Martínez, 2020; Nolan, 2020). The ability to host virtual events emerges as a strong advantage for venues catering to international markets, given the location of South Africa in relation to its key global markets. Being able to offer such services could help destination marketing organisations and convention bureaus attract events

to the country. However, it is important to acknowledge that the extent to which technological capabilities were implemented or upgraded depended on the financial and market realities of different types of venues.

Another strategy for the future was the use of venues in different cities and/or countries and exploring non-traditional venues. The first option has been described as a 'decentralised', 'multi-site', and 'multi-venue' event and has been in existence for many years (Parent & Ruetsch, 2020; Wenner, Caset & De Wit, 2019). According to Wenner, Caset & De Wit (2019), the use of multiple venues has re-emerged over time for several reasons, starting with the practice of only key speakers travelling to venues, to the growing awareness of the environmental impact of MICE events prompting the resurgence of this trend. The present study contributes to this discussion by providing evidence of the impact of (global) health crisis, which led to the re-emergence of this trend.

Some concerns have been raised in the literature regarding the impact of the pandemic and the development of attractive event options for clients through the organisation of hybrid events and multi-destination events (Bartis, Hufkie & Moraladi, 2021; Kramer et al., 2023; Lekgau & Tichaawa, 2022a). The current study illustrated that these new ways of hosting events have cost and staff implications. Event professionals are the backbone of the industry, and the pandemic drastically changed the working environment and required flexibility, adaptability, and acquiring new skills (Kramer et al., 2023). Additionally, a previous study by Lekgau & Tichaawa, (2021a) found that one of the negative consequences of the pandemic is the loss of key skills, which affects the long-term recovery and sustainability of the industry. This problem exacerbates human resource challenges faced by many tourism destinations in sub-Saharan African countries (Adeniyi & Folarin, 2021). Consequently, more collaborative work is required to address the existing skills gap as well as to ensure the availability of the necessary skills to suit the emerging MICE event environment.

Globally, MICE events have been increasingly associated with efforts to shape destination image and branding (Christofle & Fournier, 2023; Rogerson, 2018; Weru & Ngoroge, 2021). Christofle and Fournier (2023) examined this relationship given that cities are increasingly hosting international events owing to their high level of tourism and urban qualities and that these events influence urban changes (i.e., urban development and renewal). Opinions expressed by study participants indicate that the destination brand of South Africa should be used to provide new experiences for this market and expand the growth of MICE events to wilderness and outdoor venues, thereby broadening their key market (or offering) as well. Generally, discussions with the interviewees illustrate that while virtual and hybrid events broaden the MICE offerings in South Africa (as evidenced by the upgrading

of venue facilities), the various strategic, adaptive, and innovative solutions for MICE venues and the industry at large were centred on returning to predominantly in-person events. This is primarily because such events generate more economic benefits, create employment opportunities, facilitate knowledge sharing, stimulate destination development, and are associated with visitor spending (and the multiplier effect), which supports local economic development.

## 7. Conclusion

The purpose of the study described above was to understand the process of change in the MICE sector, with emphasis on venue suppliers who had to adapt to new ways of providing services when many venues had to be closed, then were reopened, and switched to virtual and hybrid formats. The study found that maintaining operations during and post-pandemic required addressing emerging concerns related to the sector. When the sector was reopened, many venues in key MICE cities in South Africa had to implement stricter health and safety measures, which caused a fundamental shift in operations and modes of working within these facilities. The importance of risk management in the sector will arguably continue to increase, particularly in the face of its volatility and more health crises predicted to occur in the future (Hall, Scott & Gössling, 2020). Also, the study demonstrated that the transition to virtual and hybrid formats was associated with the upgrading of venue facilities to accommodate virtual and hybrid events. While in-person events are crucial to the recovery of the sector, hybrid events are likely to predominate in the sector because they combine benefits of virtual formats (i.e. time convenience, affordability, prevailing risk perception in travelling and attending events and reduced environmental footprint) with those of in-person events (i.e. networking and collaboration). Consequently, more and more venues are upgrading their infrastructure (and upskilling their personnel). Further, another (adaptive) response of the sector in relation to the venue challenges (i.e. capacity limitation imposed by the government) was the use of multiple venues. This solution could still be used in the planning of international conferences, particularly in the association market where event planners can use multiple venues for their various regional members. Finally, the study found more attention was paid to the potential of non-traditional event spaces, particularly those aligning with South African tourism brand perceptions, driving recovery and redevelopment of MICE venues.

The MICE sector is defined by change, disruption, and innovation, owing to its nature, i.e. its growth and development are (to a large extent) tied to the evolution

of the global society and economy. The years 2020 to 2022 were the most remarkable years of the MICE sector, as characterised by significant changes propelled by the widespread adoption of video conferencing, which led to a change in MICE event planners' expectations in response to changing expectations of clients and attendees.

The study holds offers practical implications for MICE event planners and venue managers, demonstrating the growing importance of health and safety precautions, the need to adapt to digital and hybrid events (as these are emerging as popular event options) as well as the importance of opening up more event spaces into the MICE sector and capitalising on the destination image to provide more unique experiences. While site selection and destination competitiveness was not the subject of the study, the findings suggest these emerging practices influence and shape the MICE sector in its new development phase. Theoretically, this study extends the literature on MICE venues by exploring actions taken by venues during the pandemic and how they have affected the MICE environment. By focusing on South Africa, the study reveals how venue suppliers are able to change and demonstrates the importance of innovation, technological expertise, adaptiveness, and collaboration in their survival and relevance. Also, by focusing on one key stakeholder group, this study further contributes to the understanding of the MICE sector's resilience.

Finally, it is important to acknowledge the main limitation of this study, which is connected with the period when data were collected. Because of the way the pandemic unfolded in the following months, and the reopening of the sector's in 2022, MICE event venue requirements had to be altered to meet the changing landscape. This is why future research needs to examine how these changes affect the planning and organisation of hybrid events and their implications for the MICE sector suppliers.

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# Dynamiczne zmiany i ożywienie w obiektach eventowych: perspektywy planistów i menadżerów obiektów MICE

**Streszczenie.** Celem badania było zbadanie zmian zachodzących w obiektach, w których odbywają się wydarzenia MICE w RPA, oraz ich wpływu na ożywienie tamtejszej branży MICE po pandemii COVID-19 i dostosowanie się do nowych warunków. Analiza opiera się na danych jakościowych zebranych podczas wywiadów pogłębionych z osobami zajmującymi się planowaniem wydarzeń MICE oraz zapewnianiem obiektów do ich organizacji. Z wypowiedzi respondentów wynika, że kluczowym pierwszym krokiem umożliwiającym ponowne otwarcie tych obiektów było zapewnienie zgodności z przepisami bezpieczeństwa. W związku z faktem, że stosunkowo szybko wydarzenia zaczęły być organizowane w formie wirtualnej i hybrydowej, wiele obiektów wdrożyło niezbędne ulepszenia, aby umożliwić takie formy uczestnictwa. Wielu planistów wydarzeń rozważało również wykorzystanie wielu obiektów do organizacji wydarzeń na dużą skalę. Kryzys wywołany pandemią ponownie uwidocznił znaczenie nietypowych obiektów i przestrzeni plenerowych jako alternatywnych miejsc do organizacji wydarzeń.

**Słowa kluczowe:** wydarzenie hybrydowe, wydarzenia MICE, Republika Południowej Afryki, dostawcy, miejsca, wydarzenie wirtualne

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# City Tourism Product Development and Marketing: The Case of the Provincial Capital city of Mahikeng

**Abstract.** This article explores the city tourism product composition of Mahikeng, the capital city of South Africa's North West Province. Its goal is twofold: to capture the industry's views on the city's current urban tourism product offering and to identify the necessary marketing activities for tourism development in Mahikeng. The study used quantitative data from an online survey involving 62 tourism businesses operating in Mahikeng. The results highlight a limited level of tourism product offerings, ineffective marketing activities, and the need to develop a more diverse city tourism product mix to ensure the success of Mahikeng as a tourist city. The authors recommend the development of a varied product mix and, through this, the implementation of marketing activities more suited to cities with a provincial status.

## 1. Introduction

City tourism is a fundamental driver of social and economic growth in all major cities worldwide (Ashworth & Page, 2011). Capital cities around the world are well known as catalysts of urban tourism development thanks to their diverse offerings and the fact of being vibrant centres of culture and commerce, which attract large numbers of business and leisure tourists every year (Petrova et al., 2018). For instance, business tourists are attracted to capital cities in search of various

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business opportunities, including those involving government services and departments (Naydenov & Traykov, 2017). Leisure tourists tend to visit capital cities to do sightseeing and participate in various cultural or religious activities (Hakeem & Khan, 2018).

According to Rogerson (2012), South Africa has also started to embrace city tourism, even though it is a much younger form of tourism compared to wildlife tourism. Nonetheless, city tourism is among the least researched fields (Shoval, 2018), and even more so within the South African context. While there is some research on South African city tourism, authors in this field mainly focus on the development of urban tourism in metropolitan cities, large cities, and main towns, neglecting provincial capital cities, particularly those situated in more rural parts of the country (Rogerson & Visser, 2011; Rogerson, 2012; Rogerson & Rogerson, 2014; Pandy & Rogerson, 2019). As a result, few studies have been undertaken to identify, develop, and market city tourism products in provincial capital cities in South Africa, such as Mahikeng.

Therefore, the purpose of this study is twofold. Firstly, to identify current city tourism product offerings available in Mahikeng; and secondly, to identify effective marketing activities to promote city tourism development in Mahikeng.

This article is intended to fill the research gap regarding the development and marketing of urban tourism in provincial capitals. Practically, the findings of this study could be used as guidelines for provincial capitals in South Africa regarding the identification and development of unique city tourism products and more efficient marketing activities that are suited to this type of destinations.

## 2. Literature Review

### 2.1. Mahikeng as a Tourism Destination

The North West province is one of South Africa's nine provinces (Rogerson & Rogerson, 2020) and consists of four district municipalities (Potgieter & Litheko, 2016). The Ngaka Modiri Molema District municipality is the largest one and Mahikeng is its largest city (Drummond & Nel, 2021).

Until 1994 Mahikeng (then called Mafeking) was part of the Bantustan of Bophuthatswana, a homeland outside of the borders of South African. After the first democratic elections, this homeland was integrated into South Africa (Drummond & Drummond, 2021). The city has a rich history dating back to the nineteenth century, with many unique historical, cultural, and geographical tourist attractions

(Drummond & Drummond, 2021). These include the oldest town hall in the province, which was built in 1902 and is currently a museum commemorating the Siege of Mafikeng[1] and Sol Plaatjie, the Stadt School, which is one of the earliest schools constructed north of the Orange River and Mmabatho Sun Casino and Entertainment complex, which was one of the most visited casinos by South Africans prior to 1994, as gambling was illegal in South Africa (Prinsloo & Pelser, 2015).

According to Prinsloo and Pelser (2015), tourism opportunities in Mahikeng can be attributed not only to the city's rich history but also to its location. Mahikeng is only 25 kilometres from the Ramatlabama border post, one of the busiest border crossings between South Africa and Botswana, which is used by domestic and international tourists (Prinsloo & Pelser, 2015). Mahikeng is also home to various international hotel brands, including the Protea hotel, which is part of the Marriott International Hotel Group, various car rental agencies, such as Hertz, Avis, and Bolt, as well as a number of domestic transport services, which can be easily accessed by tourists visiting the city (Wessels & Tseane-Gumbi, 2022).

Thanks to these products and services, tourism product development and the marketing of Mahikeng as a tourist destination is a key focus for the provincial and local government (Mahikeng Local Municipality, 2020). In 2010, the South African government launched the National Growth Path Policy (NGP), which identified 21 areas, including Mahikeng, in which the development of tourism infrastructure was declared a priority with a view to strengthening the country's tourism industry (Rogerson & Nel, 2016). According to a study by Drummond et al. (2021), Mahikeng, in 2014, contributed 5.7% to the province's Gross Domestic Product (GDP).

However, there has been a drastic decline in tourism activities and economic growth in Mahikeng, and the city's contribution to the country's GDP declined to 4.5% in 2018 (Drummond et al., 2021). This decline started before the COVID-19 pandemic, which weakened the tourism industry in the city even more. In addition to the negative impact of the pandemic, the development of city tourism in Mahikeng has been thwarted by the rising costs of living and new tourism product offerings in competing destinations; another disadvantage is Mahikeng's peripheral location more than 200 km from the closest airport (Drummond et al., 2021).

## 2.2. City Tourism Products

The availability and the development of new and unique tourism products and activities are essential for a thriving city tourism destination (McKercher, 2016). As Benur and Bramwell (2015) note, tourism products are key pull factors for tour-

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[1]  Mahikeng was besieged during the Second Boer War in 1899. The Siege lasted 217 days.

ists. According to Farmaki (2012) and Garanti (2022), tourism products on offer should be diverse enough to appeal to various types of tourists, thereby enhancing the destination's attractiveness and ensuring that its tourism offering can more easily adapted to tourists' changing expectations. The following categories of tourism products have been identified from literature as significant for city tourism and are therefore considered in the following study: business tourism, tangible cultural and heritage tourism products, leisure tourism, events, nature tourism, museums tours, and theatre and concerts.

Business tourism involves professionals travelling for purposes which are related to their work (Camilleri, 2018; Spencer & Bavuma, 2018). This is done in various forms including attending meetings, conferences, or exhibitions, while also engaging in leisure activities (Anas et al., 2020; Lekgau & Tichaawa, 2021). Tangible cultural and heritage tourism products are directly related to the history and traditions of local communities, including traditional clothing and food (Achille & Fiorillo, 2022; Goussos, 2022). These tangible offerings provide opportunities for tourists to engage with and learn more about different cultures and their ways of living (Shahzalal, 2016). Leisure tourism activities, such as golfing, swimming, and horse-riding, are a way for tourists to relax, benefitting their mental and physical health (Min et al., 2015; Acha-Anyi, 2020; Maki et al., 2023). According to Zlatanov (2015), Hahm et al. (2018), Van Eck (2018), Jin and Cheng (2020) and Wessels and Tseane-Gumbi (2023), events can be defined as planned one-off occasions, ranging from small private celebrations (weddings, anniversaries) to mega events, such as international sports events, which often serve as catalysts fostering infrastructural development, attracting media attention and in this way contributing to the positive image of the destination.

Intangible cultural and heritage tourism products include museum tours, workshops for tourists who want to learn artistic skills associated with local communities, while nature-based tourism activities such as walking tours in city parks. Such offerings have become some of the most preferred city tourism activities in recent years, and their availability has a considerable effect on tourists' choice of destinations, which in turn affects destination development strategies (Araujo, 2017; Andre, Volman & Durksen, 2017; Franklin, 2018; Metin, 2019; Namazov, 2021; Utanova, 2021; Warr et al., 2021; Gu et al., 2022; UNESCO, 2023). Another very popular category of city tourism products, which has become increasingly popular with international and domestic tourists, is classified as creative tourism, which includes interactive live theatre and concert productions (Song, 2015; Zieba, 2016; Amorim et al., 2020). Availability of all of these unique tourism products can facilitate the development of effective marketing of city destinations (Benur & Bramwell, 2015).

## 2.3. City Marketing

Nykiel and Jascolt (1998), Balencourt and Zafra (2012), Popescu and Mina-Raiu (2019) and Pike (2021) argue that cities should be marketed like other products while efforts should also be made to create their brand identity in consumers' minds and build their competitive market position. Cities want to be competitive by differentiating themselves from other destinations and achieve a substantial market share in the tourism market by offering superior or unique tourism products (D'Hauteserre, 2000; Isoraite, 2018; Woyo & Slabbert, 2021; Dwyer, 2010; Abreu-Novais et al., 2016).

In order to market itself like a product, a city must first identify its unique offerings and create a recognisable image so that tourists are inclined to choose it over other cities (Liouris & Deffner, 2005). Image is a sum of beliefs, ideas, and impressions a person has about an object, agency, business programme, its facilities, and programmes (Kotler, 1982; Crompton & Lamp, 1986). In 1995, Saayman introduced eight components of a positive destination image, which include: efficacy of a destination, client orientation, magic of a destination, history of a destination, branding, sensory effect of the destination, virtue of a destination, and the atmosphere of a destination. The goal of city marketing is to convince visitors, investors, and businesses that a given city is the essential element of the reality of a given area.

According to Selby (2004), city marketing catalyses tourism development, stimulates transportation systems, improves health service delivery, and strengthens industrial infrastructure within the city. However, as Spirou (2010) points out, city marketing is challenging as it often requires considerable and sustainable investment in marketing campaigns and infrastructure as well as constant efforts to win the privilege of organising major events to strengthen its visibility. Therefore, cities need to develop a strategy with specific objectives to position themselves (Popescu & Mina-Raiu, 2019).

## 3. Methodology

This explorative study is based on quantitative data collected using an online survey. The target population consisted of all active tourism businesses operating in Mahikeng, representing the main industry sectors, namely accommodation (guesthouses, hotels, and bed-and-breakfasts), transport (car rental companies), entertainment (casinos), and food and beverage (restaurants). The survey frame was

derived from a database provided by the Department of Economic Development, Environment, Conservation and Tourism (DECECT), a key provincial government department responsible for tourism development and marketing in the North West Province. A total of 70 active tourism businesses were identified in the database. The survey was conducted online because of COVID-19 restrictions.

The survey questionnaire was developed using the QuestionPro software on the basis of Khusnutdinova et al. (2019), Maxim (2019), Postma et al. (2017), Rogerson (2012), Rogerson and Rogerson (2020), and Rogerson and Visser (2011). It was distributed by email to all businesses in the target population, and reminder emails were sent after every ten days during the data collection period (from August 5 to October 1, 2021). 62 completed questionnaires were returned, which represents the response rate of 88%. The findings of the survey are presented in the following section.

## 4.  Results

Table 1. Percentage of respondents who are aware
of different categories of tourism products in Mahikeng

| Product category | Awareness |
| --- | --- |
| Business tourism products | 59% |
| Tangible cultural and heritage tourism products | 70% |
| Leisure tourism products | 56% |
| Natural tourism products | 76% |
| Events | 48% |
| Shopping opportunities | 43% |
| Museum tours | 64% |
| Theatre and concert products | 28% |

Source: Authors

Respondents were asked to identify tourism-related products they were aware of in Mahikeng. Because many tourism products in the city are not well advertised, providers of tourism services are not aware of their existence; consequently, the range of products they can offer to their guests is necessarily limited. As can be seen in Table 1, the highest level of awareness (76%) exists with regard to natural tourism products, followed by tangible cultural and heritage tourism products (70%). Only 28% of respondents were aware of theatre and concert productions available in the city.

Table 2. The importance of tourism products for the development of Mahikeng as a city tourism destination

| Rating / Products | Not important at all | Unimportant | Neutral | Important | Extremely important | Mean value | Standard deviation |
|---|---|---|---|---|---|---|---|
| Business tourism products | 15% | 23% | 26% | 16% | 20% | 4.19 | 0.884 |
| Tangible cultural and heritage tourism products | 10% | 26% | 16% | 21% | 27% | 4.32 | 0.805 |
| Leisure tourism products | 13% | 28% | 26% | 18% | 15% | 4.16 | 0.814 |
| Nature tourism products | 12% | 24% | 26% | 25% | 13% | 4.31 | 0.861 |
| Shopping opportunities | 8% | 16% | 22% | 20% | 34% | 4.36 | 0.817 |
| Events | 21% | 22% | 10% | 20% | 27% | 4.45 | 0.803 |
| Museum tours | 5% | 8% | 33% | 39% | 15% | 4.20 | 1.010 |
| Theatre and concert products | 6% | 18% | 21% | 39% | 16% | 4.21 | 1.042 |

Note: Likert Scale (1: Not important at all — 5: Extremely important)
Source: Authors

Table 2 shows results regarding the relative importance of tourism product offerings critical for the development of urban tourism in Mahikeng. According to the respondents, the four tourism product offerings critical for tourism development in Mahikeng include events ($\overline{x}$=4.45) as the most critical, followed by shopping opportunities ($\overline{x}$=4.36), tangible cultural and heritage tourism products ($\overline{x}$=4.32) and nature tourism products ($\overline{x}$=4.31).

Table 3 shows results regarding the relative importance of marketing activities that the respondents considered to be critical for the development of urban tourism in Mahikeng. Taking into account the mean values of responses, ensuring effective signage for tourists ($\overline{x}$=4.47) was seen as a measure of relatively the greatest importance, followed by promoting the city's cleanliness ($\overline{x}$=4.44) and its unique ambience ($\overline{x}$=4.39).

Respondents were also asked to indicate the extent to which the city's status as a provincial capital helps to attract greater media attention and more marketing opportunities, such as events, activities, and programmes, whose direct goal is not necessarily to market the city but which can increase the city's popularity. These include local cultural festivals such as Mahika Mahikeng, provincial government parliamentary sittings, and many more. The results are presented in Table 4.

Table 3. The importance of marketing activities for the development of urban tourism in Mahikeng

| Rating / Activity | Not important at all | Unimportant | Neutral | Important | Extremely important | Mean value (x̄) | Standard deviation |
|---|---|---|---|---|---|---|---|
| Promoting the city's positive image | — | 5% | 11% | 27% | 57% | 4.36** | 0.870 |
| Promoting effective service delivery | — | 2% | 15% | 32% | 51% | 4.34** | 0.788 |
| Managing the city's brand as a tourism destination | — | 2% | 18% | 24% | 56% | 4.35** | 0.832 |
| Promoting the city's cleanliness | — | 5% | 8% | 26% | 61% | 4.44* | 0.842 |
| Promoting the city's transport accessibility | — | 3% | 15% | 25% | 57% | 4.35** | 0.851 |
| Promoting the city's unique ambience | 2% | 2% | 13% | 24% | 59% | 4.39* | 0.894 |
| Ensuring effective signage for tourists visiting the city | 2% | 2% | 7% | 28% | 61% | 4.47* | 0.824 |

Note: Likert scale (1: Not important at all — 5: Extremely important);
— No responses; *Most important; **Least important
Source: Authors

Table 4. The impact of Mahikeng's status as a provincial capital on publicity and marketing opportunities

| Rating / Benefit | Not at all | To a lesser extent | To a moderate extent | To a greater extent | Definitely | Mean |
|---|---|---|---|---|---|---|
| Media exposure | 16% | 34% | 15% | 20% | 15% | 2.84 |
| Marketing opportunities | 15% | 25% | 31% | 16% | 13% | 2.89 |

Note: Likert scale (1: Not at all — 5: Definitely)
Source: Authors

The relationship between the tourism products and the marketing activities was measured using the Spearman rank order correlation coefficient (Table 5), which is appropriate for small samples (Podhorodecka, 2018). The correlations were interpreted according to Cohen's guidelines (1988, p. 79), where the $r_s$ value of 0.1 denotes a small correlation, 0.3 — a medium correlation, 0.5 or higher — a large correlation.

Table 5. Spearman's rank order correlations ($r_s$) between marketing activities and tourism product offerings

| | | Business tourism | Tangible cultural and heritage tourism products | Leisure tourism | Natural tourism | Events | Shop-ping oppor-tunities | Museum tours | Theatre and concerts |
|---|---|---|---|---|---|---|---|---|---|
| Promoting the city's positive image | $r_s$ | 0.302** | .419** | .316** | .478** | .448** | .356** | .380** | .508*** |
| | Sig. (2-tailed) | 0.017 | 0.001 | 0.012 | 0.000 | 0.000 | 0.004 | 0.002 | 0.000 |
| | N | 62 | 62 | 62 | 62 | 62 | 62 | 62 | 62 |
| Promoting service delivery | $r_s$ | .345** | .557*** | .357** | .415** | .556*** | .527*** | .623*** | .499** |
| | Sig. (2-tailed) | 0.006 | 0.000 | 0.004 | 0.001 | 0.000 | 0.000 | 0.000 | 0.000 |
| | N | 62 | 62 | 62 | 62 | 62 | 62 | 62 | 62 |
| Managing the city's brand as a tourism destination | $r_s$ | .267* | .270* | .362** | .388** | .420** | .313** | .338** | .325** |
| | Sig. (2-tailed) | 0.036 | 0.035 | 0.004 | 0.002 | 0.001 | 0.013 | 0.007 | 0.010 |
| | N | 62 | 62 | 62 | 62 | 62 | 62 | 62 | 62 |
| Promoting the city's cleanliness | $r_s$ | .215 | .397** | 0.239 | .456** | .518*** | .292* | .375** | .438** |
| | Sig. (2-tailed) | 0.093 | 0.001 | 0.062 | 0.000 | 0.000 | 0.021 | 0.003 | 0.000 |
| | N | 62 | 62 | 62 | 62 | 62 | 62 | 62 | 62 |
| Promoting the city's transport accessibility | $r_s$ | .401** | .429** | .398** | .406** | .483** | .415** | .467** | .414** |
| | Sig. (2-tailed) | 0.001 | 0.001 | 0.001 | 0.001 | 0.000 | 0.001 | 0.000 | 0.001 |
| | N | 62 | 62 | 62 | 62 | 62 | 62 | 62 | 62 |
| Promoting the unique ambience of Mahikeng | rs | .246 | .375** | .300** | .292* | .359** | .353** | .433** | .266* |
| | Sig. (2-tailed) | 0.054 | 0.003 | 0.018 | 0.022 | 0.004 | 0.005 | 0.000 | 0.037 |
| | N | 62 | 62 | 62 | 62 | 62 | 62 | 62 | 62 |
| Ensuring effective signage for tourists visiting Mahikeng | $r_s$ | .329** | .420** | .442** | .450** | .488** | .422** | .371** | .379** |
| | Sig. (2-tailed) | 0.009 | 0.001 | 0.000 | 0.000 | 0.000 | 0.001 | 0.003 | 0.002 |
| | N | 62 | 62 | 62 | 62 | 62 | 62 | 62 | 62 |

p ≤ 0.05; $r_s$ *small=0.1, **medium=0.3, ***large=0.5 (Cohen, 1988, p. 79)
Source: Authors

As can be seen in Table 5, a number of relationships between marketing activities and tourism product offerings are statistically significant. Firstly, a large positive relationship exists between promoting the city's positive image and theatre and concerts ($r_s$=.508; $p$≤0.000). Shopping opportunities ($r_s$=.527; $p$≤0.000), museum tours ($r_s$=.623; $p$≤0.000), tangible cultural and heritage tourism products ($r_s$=.557; $p$≤0.000) and events ($r_s$=.556; $p$≤0.000) were found to be positively correlated with the promotion of service delivery. Events ($r_s$=.518; $p$≤0.000) were also found to be

strongly correlated with promoting the city's cleanliness. No statistically significant correlation was found between promoting the city's cleanliness ($p>0.05$) or its unique ambience ($p>0.05$) and business tourism products, which can be taken to mean that such measures have no effect on the development of this category of products.

## 5.  Discussion

The purpose of the study was to identify tourism products that constitute Mahikeng's urban tourism offering as well as marketing activities regarded as desirable for the development of urban tourism. The results in Table 1 revealed that respondents are the most aware of nature-based tourism products currently available in Mahikeng. This is consistent with Rogerson's observation (2012) stating that while South Africa has embraced various forms of tourism, traditional wildlife tourism offerings still takes priority and is the best developed, best marketed and a most encouraged tourist activity by tourism product providers. However, as the findings show, Mahikeng's urban tourism product portfolio is not marketed in full as Farmaki (2012) and Garanti (2022) recommend an attractive destination should. Currently, the city's offerings of events, theatre productions, and concerts are not well known among tourism product providers and the offering of such is also very limited. As stated by Kruger and Saayman (2015), art-related tourism products such as these, while in most cases not available as part of a permanent offering, have the potential of attracting large crowds of tourists and media coverage and should be encouraged to ensure destination development. This, in turn, allows other primary tourism sectors, including the accommodation and transport sectors, to also thrive, thus creating business opportunities for other sectors of the destination's local economy (Saayman & Saayman, 2019). This is also confirmed by the ratings in Table 2, which show that events are regarded as important for the development of urban tourism in Mahikeng. This finding is very significant, especially for festival organisers, because despite the existence of various cultural groups in the city, their traditions and history are not represented in the form of festivals. Also, given the rich history of Mahikeng as well the presence of indigenous cultures, they could be featured in concert productions created to commemorate historically significant tribal leaders and happenings of the Setswana communities, a very prominent culture among local communities in this city.

The results also reveal the importance of shopping opportunities as another element of urban tourism product offering, which has been identified mostly in studies done in places such as Hong Kong, Hungary, and Italy (Choi et al., 2018;

Michalko et al., 2014; Rabbiosi, 2011). Research conducted on this topic in South Africa is limited and shopping opportunities as a tourist attraction has been observed mainly within metropolitan cities such as Johannesburg, Durban, and Cape Town (Rogerson, 2011; Rogerson & Rogerson, 2017). Results from previous studies could not be generalised to Mahikeng because of its remote location in the rural part of the country and its size. A study done by Saayman and Saayman (2012) did indicate that shopping tourists in South Africa mostly come from neighbouring countries, including Botswana, with Mahikeng being situated only 10 kilometres from its border. It is therefore recommended that more international brands should be encouraged to provide unique shopping products as well as shopping experiences to shopping tourists in Mahikeng. The local government should also try to attract international investors to support a new shopping centre development in the city.

One finding that should be reason for concern is the fact that business tourism products were regarded as relatively less important for the development of city tourism. As Lekgau and Tichaawa (2021) point out, business tourism, particularly in a post-COVID-19 environment, can drive the development of an city tourism destination. It is, therefore, crucial that those responsible for tourism policy, especially at provincial and municipal government levels, should recognise the importance and potential contribution that business tourism can make to the development of city tourism. The importance of business tourism activities can be increased by upgrading the existing convention centre in Mahikeng, which has, even prior to the COVID-19 pandemic, not been utilised to its full potential.

The study also revealed the importance of promoting the city's cleanliness and its unique ambience as well as the use of effective signage as critical elements of marketing Mahikeng as a city tourism destination. The city is obviously lacking in these areas and is generally believed not to have a positive image as a tourist destination (Wessels & Tseane-Gumbi, 2022). As already mentioned, cities should be marketed like other products to create their brand identity and strengthen their competitive market position. It is therefore important for the city to make improvements in these areas, which are critical if the city is to be successfully marketed as a competitive tourism product with a unique identity. One could also expect that Mahikeng's status as a provincial capital city should attract media attention and marketing opportunities. Surprisingly, respondents in the survey were rather sceptical as regards to the positive impact of the city's status on exposure and marketing opportunities (see Table 4). Petrova et al. (2018) argue that capital cities drive tourism by providing more opportunities for commercial activities, thus attracting more media exposure. One can therefore ask the obvious question: Why does this particular provincial capital not get more media exposure ? This authors

believes that this situation can be attributed to the unavailability of large-scale events, which the media could cover; it should therefore become a priority for Mahikeng to attract such events.

Spearman rank order correlations shown in Table 5 can be used as a guidance for alternative service delivery practices and marketing activities in Mahikeng. Activities regarded as very important are currently those the city is grappling with. The local government should therefore mandate that all these services, including those responsible for cleaning and effective signage, should be prioritised in the municipal operational and maintenance budget. Only after all these services have been delivered, should they be included in all marketing campaigns relating to city tourism product development. The promotion of service delivery will not only help the development of urban tourism products such as events, theatre productions and concerts, and shopping opportunities, but it will also encourage the continuing development of tangible cultural and heritage tourism products, which will strengthen the city's a competitive advantage.

## 6. Conclusion

The article makes valuable theoretical and practical contributions. For one thing, it stimulates debate and fills the gap in the literature on product development and marketing of provincial capital cities as urban destinations in South Africa. Furthermore, the study offers useful insights for destination managers, marketers, policymakers as well as tourism product developers in the private sector regarding the city's tourism potential, which they can use to foster a thriving and sustainable tourism industry.

The study has its limitations. Firstly, since it was conducted during the pandemic, many of the respondents were neutral in their responses, possibly because they were unsure if the tourism industry would ever recover after the pandemic. Secondly, the results for Mahikeng can hardly be generalised to other provincial capital cities in South Africa. Each province and each provincial capital city in South Africa have a different and unique tourism product offering. Each is different in terms of its geographical location and infrastructure. Thirdly, the study only presents opinions of individual tourism enterprises, which are often a reflection of their own business interests (hence the relatively low assessment of the importance of city marketing management). More interesting insights could be gained by comparing these answers with the views of the city's authorities, which should have a broader view of destination marketing.

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## Rozwój i marketing oferty produktów turystyki miejskiej w Mahikeng w RPA

**Streszczenie.** Artykuł przedstawia badanie dotyczące oferty turystyki miejskiej w Mahikeng, stolicy Prowincji Północno-Zachodniej w RPA. Celem badania było zebranie opinii przedstawicieli branży na temat aktualnej oferty produktów turystyki miejskiej i działań marketingowych, które, ich zdaniem, mogą pomóc w rozwoju turystyki w Mahikeng. Autorzy prezentują dane ilościowe zebrane za pomocą ankiety internetowej, na którą odpowiedziały 62 firmy z branży turystycznej, które działają w mieście. Wyniki świadczą o tym, że obecna oferta produktów turystycznych jest dość ograniczona, a działania marketingowe są mało skuteczne. Istnieje zatem potrzeba opracowania bardziej zróżni-

cowanego asortymentu produktów, aby Mahikeng mogło z powodzeniem odgrywać rolę ośrodka recepcji turystyki miejskiej. Konieczne jest również wdrożenie działań marketingowych, które w lepszym stopniu odpowiadają potrzebom miasta będącego stolicą prowincji.

**Słowa kluczowe:** turystyka miejska, rozwój produktów turystyki miejskiej, marketing turystyki miejskiej, marketing stolicy prowincji, gama produktów turystyki miejskiej, Mahikeng

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A reference list should be ordered alphabetically by first author's / editor's surname or by title, in the case of works whose author/ editor is unknown, and in the case of authors with multiple works, they should be listed chronologically by year of publication.
• Referencing a journal article
The basic format is: Author surname, Initial(s)., (Year), Article title (not italicised), Journal title (italicised), Volume (italicised) (issue or part number), page numbers, DOI:

Oppermann, M.J. (2000). Tourism Destination Loyalty. *Journal of Travel Research*, *39*(1), 78–84. https://doi.org/10.1177%2F004728750003900110

• Referencing a book

The basic format is: Author/Editor surname, Initial(s)., (copyright year), Book title (italicised), edition number (in brackets). Publisher. DOI or URL:

Kotler, P., Bowen, J.T., Makens, J., & Baloglu, S. (2017). *Marketing for Hospitality and Tourism* (7th ed.). Pearson Education. https://doi.org/10.1177%2F0047287507303976

• Chapter in an edited book

The basic format is: Surname of the chapter's author, initial(s)., Copyright year, Chapter title (not italicised), In, Editor initial(s)., Surname + (Ed.) or Editor initial(s)., surnames (separated by "&") + (Eds.), Edited book title (italicised), edition number and page range (in brackets). Publisher. DOI or URL:

Scott, N.R., & Le, D.A. (2017). Tourism Experience: A Review. In N.R. Scott & J. Gao (Eds.), *Visitor Experience Design* (2nd ed., pp. 30–52). CABI. https://doi.org/10.1080/10645578.2016.1144023

• Referencing an e-book

Mitchell, J.A., Thomson, M., & Coyne, R.P. (2017). *A guide to citation*. https://www.mendeley.com/reference-management/ reference-manager

• Referencing a chapter in an e-book

Troy, B.N. (2015). APA citation rules. In S.T. Williams (Ed.), *A guide to citation rules* (2nd ed., pp. 50–95). https://www.mendeley.com/reference-management/reference-manager

• Referencing an entire website created by a corporation, institution or group

Use the following format: Corporation/group/organization name. (year website was last updated/published, month day if given). Title of website. URL:

WHO. (2014, 14 listopada). World Health Organization. https://www.who.int/

• Referencing a single web page

Use the following format: author surname, initial(s). (year, month, day). Page title (italicised). Site name. URL:

Mitchell, J.A., Thomson, M., & Coyne, R.P. (2017, January 25). *APA citation. How and when to reference*. https://www.howandwhentoreference.com/APAcitation