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A modus operandi for sustainable-tourism transformations

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ABSTRACT

In this article, we identify and discuss unifying principles to co-design transformational sustainable-tourism interventions through participatory methodologies. We conduct a meta-ethnographic synthesis of the emerging relevant tourism literature (14 articles), and we propose five methodological requirements that underpin effective interventions for sustainable tourism transformations. The requirements are (1) co-creating actionable knowledge, (2) establishing safe spaces, (3) challenging power structures and managing emerging tensions, (4) shaping systemic synergies and (5) blurring the lines. Together, these requirements constitute a modus operandi – that is, a way of thinking and acting collectively that provides a unified foundation for impacted, practice-oriented research on transformational sustainability in tourism. This modus operandi is a meta-perspective containing a cohesive set of guiding principles that integrate and elevate transformational methods, approaches and techniques, and represents our contribution to accelerating the field's expansion.

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Tourism; sustainable transformation; methodology; actionable knowledge; collaboration

Introduction

To meet the pressing demand for a more sustainable future, it is essential that tourism undergoes a sustainable transformation – a systemic shift towards sustainability that prioritises beneficial sociocultural and ecological practices (Bertella, 2022; Fennell & Bowyer, 2020). As argued by some sustainability scholars, we need to better understand the methodologies that can promote such a transformation, including methods, tools and procedures (Bentz et al., 2022; Riechers et al., 2022; Wiek & Lang, 2016). We also need to better comprehend the underlying values, worldviews and principles of these methodologies, which guide the design and implementation of interventions that are contextually relevant and inclusive of diverse perspectives (Abson et al., 2017; Bentz et al., 2022; Bradbury et al., 2019; Fazey et al., 2017, 2018; Fischer & Riechers, 2019; Horcea-Milcu et al., 2019; Wiek & Lang, 2016).

Traditional approaches to sustainability challenges in tourism have operated within the constraints of current systems. Sustainable tourism has followed a transition-management approach, focusing on mechanisms for gradual change that do not disrupt existing power structures or system-growth trajectories (Gössling et al., 2012, 2016; Hall et al., 2018). Some scholars have argued that the tourism sector is permeated by a reductionist way of thinking characterised by an extractive logic that does not consider the relationships between socioeconomic and environmental components (Bellato et al., 2023; Dredge, 2022). This way of thinking is limited to managing the symptoms, rather than the underlying causes, of unsustainability (Gössling et al., 2012, 2016).

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This argument challenges the traditional understanding of sustainability and can be used to rethink this concept in terms of transformations. Sustainable-tourism transformations are changes that require a holistic approach to tourism as a system of various interconnected components, as discussed in the regenerative-tourism literature (Becken & Coghlan, 2024; Bellato & Pollock, 2023).

Currently, there is scarce knowledge about the methodologies needed to support transformative system change in tourism with the aim of enhancing the well-being of businesses, ecosystems and communities (Duedahl, 2021; Farsari et al., 2023; Hales & Jennings, 2017; Higgins-Desbiolles, 2017; Ruhanen et al., 2019). Some scholars have suggested that participatory methodologies may fuel academic engagement and pave the way for transformative solutions (Ateljevic, 2020; Bertella, 2022; Farsari et al., 2023). They have noted that these solutions necessitate adaptive, collaborative strategies that emphasise learning and action (Bellato et al., 2023, 2024; Dredge, 2022). This still limited research risks becoming scattered, fragmented and devoid of transformative impact. Therefore, it is crucial to synthesise the knowledge of the methodologies that can operationalise sustainable-tourism transformations.

Seeking to contribute to establishing a coherent foundation for impactful, practice-oriented research for sustainable transformations in tourism, we focused on participatory methodologies and investigated the unifying principles for co-designing transformational sustainable-tourism interventions. We followed four steps: (1) reviewing transformational sustainability research and methodologies, (2) assessing their application to tourism, (3) conducting a meta-ethnographic synthesis (MES) of the literature on participatory methodologies for sustainable-tourism transformation and (4) highlighting the key transformational elements of these methodologies. We identified five methodological requirements as unifying principles that guide effective interventions for sustainable-tourism transformation. When combined and adopted together, these requirements serve as a *modus operandi* – a way of acting and thinking collectively that is reflexively reproduced through practice, which can drive impactful, practice-oriented research on transformational sustainability in tourism.

Theory

Sustainable-transformation research and methodologies

The ambitious goals of the United Nations' Agenda 2030 (United Nations, 2015) risk positioning sustainable transformations as utopian and unattainable. These goals challenge existing socioeconomic paradigms and traditional research approaches, thus increasing the gap between theory and practice by keeping what is desirable separated from the domain of implementation (Bentz et al., 2022; Blythe et al., 2018; Bradbury et al., 2019; Fazey et al., 2017, 2018; Hölscher et al., 2018). Addressing this gap requires the adoption of an epistemological approach that, by advocating for 'incremental change with a transformative agenda' (Patterson et al., 2017, p. 4), anchors sustainability transformation in the realm of the possible. This kind of approach supports a research strategy that challenges linear and predictable models. It promises significant sustainability gains without revolutions; rather, it aims for a reconfiguration of the system based on stronger sustainability premises (Hölscher et al., 2018). This means engaging with the ethical and value-based dimensions of sustainability, as well as the complexity and unpredictability of social change (Fazey et al., 2017; Horcea-Milcu et al., 2019). Thus, the focus of this approach to sustainable transformation is on the operationalisation of the transformative process.

Operationalising transformation involves a deep engagement with the practical aspects of how to bring about change, especially the design of interventions. Interventions are deliberate actions aimed at achieving desired outcomes (Linnér & Wibeck, 2021); however, outcomes are intrinsically unpredictable. Interventions influence and are influenced by a system's internal and external elements, including agents' diverse knowledge and motivations (Patterson et al., 2017); worldviews, ethics and behavioural habits (Fazey et al., 2018); and the power and political dynamics of the context (Blythe et al., 2018). Bringing about change requires engaging with these aspects and

related methods, tools and procedures (Abson et al., 2017; Bentz et al., 2022; Riechers et al., 2022). In this regard, Bentz et al. (2022, p. 497) distinguish between the means and the manner of transformation using the following definitions:

The means can be understood as the many solutions, technical and practical methods, or actions that are presented as significant to transformative change. The manner, in contrast, represents the ways in which something is done, i.e. ways of acting. It describes the core values, principles, qualities, and relationships that not only underpin and motivate transformative change, but shape the process.

The means consist of methods and tools that delineate pathways to transformation, from superficial 'quick fixes' to more radical interventions that target the core properties, structures and paradigms of a system. The manner refers to intangible aspects governing how agents navigate the transformative process. By integrating the appropriate means and manner at critical leverage points (i.e. parts of a complex system where minor adjustments can lead to significant changes; Abson et al., 2017; König, 2018; Riechers et al., 2022), interventions can be effectively implemented to drive system transformations.

Given the complex nature of sustainable transformations, it is important to study the methodologies required for their effective design and implementation (Bentz et al., 2022; European Environment Agency [EEA], 2018; Fazey et al., 2017; Wiek & Lang, 2016; Wiek et al., 2011). Sustainable-transformation scholars recognise the importance of knowledge generation, sharing and utilisation, and they favour methodological frameworks that are rooted in systems thinking and knowledge co-creation (Fazey et al., 2018; König, 2018; Wiek & Lang, 2016). Their approach integrates descriptive-analytical, normative and instructional knowledge to understand complex problems, incorporate ethical considerations and drive actionable solutions (Wiek & Lang, 2016). The concept of knowledge co-creation is sometimes used in relation to these methodologies, which include various approaches (e.g. action research and participatory research) and can be defined as '[i]terative and collaborative processes involving diverse types of expertise, knowledge and actors to produce context-specific knowledge and pathways towards a sustainable future' (Norström et al., 2020, p. 183). Importantly, knowledge co-creation for sustainability is linked to transformative changes concerning major shifts in values and worldviews (Abson et al., 2017; Becken & Coghlan, 2024; Bentz et al., 2022; Norström et al., 2020; Rastegar & Becken, 2024) and commented on in relation to the need for a reflexive and collaborative attitude among researchers (Horlings et al., 2020; Norström et al., 2020; Schneider et al., 2021). This attitude requires careful boundary work (Gieryn, 1983). Such work allows openness and enhances credible, salient and legitimate scientific knowledge through various activities, including agreements about rules of conduct, feedback mechanisms and reports on scientifically and societally relevant outputs and outcomes (Andrews et al., 2024).

Several scholars have emphasised the need for participative, collaborative, transdisciplinary and experimental methodologies to bridge the gap between theory and practice (Abson et al., 2017; Blythe et al., 2018; Fazey et al., 2017, 2018; Wiek et al., 2011). Researchers are encouraged to collaborate across disciplines and with practitioners to develop sector-specific, impact-focused methodologies for sustainability (Bradbury et al., 2019; Bruhn, 2021; Miller et al., 2014; Wiek & Lang, 2016).

Sustainability transformations in tourism

In a significant departure from traditional approaches, some tourism scholars have discussed approaches driven by impact-led action research and engaged scholarship. Some of them have investigated the holistic sustainability paradigm, which emphasises not only the sustainability of resources but also the active restoration and enhancement of ecosystems and social fabrics (Becken & Coghlan, 2024; Dredge, 2022; Pritchard et al., 2011). Other researchers have embraced more radical perspectives on sustainable transformations, and they have attempted to unify the discipline conceptually as a starting point for its operationalisation (Fennell & Bowyer, 2020). This transformative movement in tourism research has highlighted the importance of participatory, inclusive

and activist research academic forms (Jamal & Camargo, 2014; Morgan et al., 2018), which are sometimes grounded in knowledge co-creation, the ethics of care and action research (Bertella, 2022; Fennell & Bowyer, 2020; Hales & Jennings, 2017). These academic forms are also linked to justice issues (Jamal & Camargo, 2014; Rastegar & Becken, 2024). Recently, they have been discussed in relation to the epistemologies of regenerative tourism (Bellato et al., 2024). The scholars who have contributed to this literature have elaborated different futures, and they have combined alternative radical worldviews to collectively realise new visions (Ateljevic, 2020; Bellato et al., 2023; Bertella, 2022; Dredge, 2022; Farsari et al., 2023).

These contributions are promising and point to a research direction that requires further development. Hence, we conducted an MES of studies to integrate early contributions found at the margins of the tourism scholarship into a cohesive body of work that will prevent them from evolving in isolation.

Method

An MES is an iterative process that involves reflexively adapting the research approach to emerging findings and reinterpreting ideas in new contexts. It entails creating narrative descriptions (translations) that maintain the relationships among concepts and synthesising these into new conceptualisations, potentially leading to novel theories (Noblit & Hare, 1988). The logic is to move from concepts (descriptive level) to themes with greater conceptual relevance (argumentative level) and, via the identification of metaphors (shared themes across data sources), to the translation and synthesis of constructs (interpretive level). We followed the MES structure proposed by Noblit and Hare (1998), which was adapted to tourism research by Smit et al. (2020). We progressed through the following phases: getting started and choosing relevant studies, reading and connecting the studies, translating and synthesising the translations, and expressing the synthesis.

Getting started and choosing relevant studies

Following the principles outlined by Noblit and Hare (1988), we aimed to identify a small sample of peer-reviewed qualitative studies that critically reflected on their methodologies and provided strong empirical evidence of their contributions to tourism sustainability (Figure 1).

We conducted parallel searches on Web of Science and Google Scholar for articles published between 2016 and 2023, and we focused on those that aligned with the 2015 United Nations Sustainable Development Goals, which have influenced tourism research towards the topic of sustainable transformation (Ruhanen et al., 2019). After reviewing 126 abstracts, we identified 41 articles that explicitly applied creative and/or collaborative methodologies. We prioritised studies with robust methods and empirical analyses, which resulted in a purposive selection of 12 articles. Furthermore, a snowballing approach led to the inclusion of two more studies. Thus, the final dataset consisted of 14 articles (Table 1).

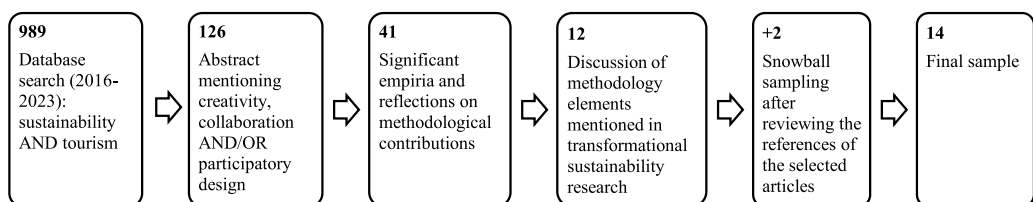


Figure 1. MES selection process.

Table 1. Selected articles, study contexts, analysed methods, targeted agents and key metaphors.

| Articles | Study contexts | Theoretical and epistemological approaches | Analysed methods | Targeted agents | Key metaphors |
|--------------------------------|---|--|--|---|---|
| Arias and Kieffer (2023) | Community-based rural tourism (Mexico) | Participative action research | Participatory workshops | Researchers, a group of women involved in community-based rural tourism and two nongovernmental organisations | Safe spaces, reflexivity, transdisciplinarity, new practices, new attitudes and power dimension |
| Koens et al. (2022) | Urban-tourism planning (EU cities) | Participatory learning and serious games theory | Serious gaming | 73 participants (students, practitioners, government professionals and residents) | New understandings, different perspectives, inclusion and system thinking |
| Duxbury et al. (2021) | Creative-tourism project (Portugal) | Action research, engaged scholarship and para-ethnography | Idea Labs | 40 organisations, researchers and practitioners | Hybrid roles, knowledge democratisation and common spaces |
| Lalicic and Weber-Sabil (2021) | Serious gaming for destination planning (location not given) | Social constructivism, serious games theory and semiotic structuralism | Serious gaming | Municipalities, urban planners, tourism-destination stakeholders and destination-marketing organisations | New insights, consensus building, new attitudes and synergies |
| Wengel et al. (2021) | Volunteer tourism-related workshops (New Zealand) | Constructivism/constructionism, the concept of play and the theory of flow | Lego Serious Play | Volunteers and farm hosts | Common voice, shared vision, new attitudes, the balance of power, and inclusion |
| Bertella et al. (2021) | Workshops for destination stakeholders (Norway) | Participative action research and social learning | Hybrid methods (design thinking, theory of change and business model canvas) | A stakeholder cluster (public and private sectors) | Shared vision, synergies, co-designed solutions, network, transdisciplinarity and resistance |
| Duedahl (2021) | 'Sustainable Experiences in Tourism' research project (Norway) | Pragmatism | Participative action research and shared enquiry | Researchers and a cluster of practitioners involved in the project | New conceptualisations, hybrid roles, safe spaces, co-designed solutions and reflexivity |
| Tourais and Videira (2021) | Participatory transition-management project related to tourism (Portugal) | Action research, transition management and participative modelling | Participatory system mapping | Innovation frontrunners, sustainability-certified tourism businesses, academia and public administrations | New understandings, shared vision, co-designed solutions, leverage points, synergies |

(Continued)

Table 1. Continued.

| Articles | Study contexts | Theoretical and epistemological approaches | Analysed methods | Targeted agents | Key metaphors |
|----------------------------------|---|--|---|---|---|
| Scuttari et al. (2021) | Participatory destination design at the Unesco Dolomites site (Italy) | Participative and collaborative design as well as placemaking | Visual ethnography, participant observation and cognitive maps | Travellers in the area and project participants (private- and public-sector institutions) | Network, reflexivity, new practices, systems thinking, safe spaces and resistance |
| Phi and Clausen (2021) | Courses in tourism-related higher education (Denmark) | Social innovation theories, design-based learning, value-based education and communities of practice | Hybrid methods (value-based activities, design thinking and pitching competition) | Tourism students | Social norms, new attitudes, systems thinking and real-world experimentation |
| Liburd et al. (2020) | Sustainable-tourism projects (Denmark and Norway) | Heterogeneous constructionism, complex process of theory, and pragmatism | Tourism co-design and vignettes | Project participants (students, businesses and residents) | New understandings, shared vision, new practices, hybrid roles, safe spaces and co-designed solutions |
| Jernsand (2019) | Student living labs for sustainable tourism (Sweden and Kenya) | Experiential learning and action research | Living Labs | Tourism students | Co-designed solutions, transdisciplinarity, reflexivity and real-world experimentation |
| Chatkaewnapanon and Kelly (2019) | Community arts project (Thailand) | Place development and participative art practices | Drawing, visual storytelling and future scenarios | Young residents in rural communities | Shared vision, safe spaces, common voice, power balance and inclusion |
| Wengel et al. (2019) | 'Tourism for All' project about accessibility (New Zealand) | Social constructivism and creative participatory research | Ketso method | Diverse stakeholders, including people with and without disabilities | Safe spaces, knowledge democratisation, trustworthiness and inclusion |

Reading and connecting the studies

When reading the selected articles, we used a step-by-step approach to analyse the data both descriptively and in relation to the literature on transformational sustainability. First, we identified a series of descriptive categories and used descriptive coding (Saldaña, 2016) to reduce and organise the themes. The descriptive coding highlighted a convergence on constructivist epistemologies and action-research designs across the studies (Table 1, column 3). It also provided us with an overview of the methods (Table 1, column 4) and the main stakeholders engaged in collaborative efforts (Table 1, column 5). Then, as suggested by Smit et al. (2020), we identified each article's metaphors – that is, their broader ideas (Table 1, column 6). These metaphors were used to determine the relations between the studies, including their commonalities and differences.

Next, we used concept coding, which identifies key ideas in the data (Saldaña, 2016), to create a common conceptual ground for the selected articles and proceed with the abstraction and meta-interpretation (Noblit & Hare, 1998; Smit et al., 2020). We framed the studies with a list of concepts from the literature on transformational sustainability (Table 2, column 1). In this way, the key concepts were embedded in an analytical framework that we then used to conduct the second- and third-order interpretations of the MES (Table 2, columns 2, 3 and 4). We started by focusing on the key concepts (Table 2, rows 3–7): knowledge types, collaboration, participant roles, outcome and leverage points. In the next step, we used the leverage points framework (Abson et al., 2017; Riechers et al., 2022), which consisted of parameters, feedback, design and intent, to evaluate whether the proposed solutions targeted surface-level or deeper aspects of the system (Table 2, row 6). This comprehensive evaluation laid the groundwork for the next phase. Top of Form

Translating and synthesising the studies, and expressing the synthesis

In this context, 'translating' meant searching for key metaphors and variations in ideas across the articles and organising them into broader categories or constructs. Each paper was analysed in detail, borrowing words from the texts and paraphrasing them if necessary (Smit et al., 2020). This process allowed us to add a deeper level of understanding concerning each article and start seeing the bigger picture. The translation showed how the methodologies contributed to distinct aspects of the transformations towards sustainability. It revealed the characteristics that made them transformational and how they related to tourism, its stakeholders and its challenges. In performing this analytical step, which represents the second-order interpretation, our focus shifted from the articles to the constructs (Table 2, columns 2 and 3).

The synthesis resulted from interpreting the articles as an integrated set when we conducted the third-order interpretation (Table 2, column 4). This allowed the emerging constructs to shape a meta-narrative, which represented a new line of argument. The synthesis combined the results by integrating all the rounds of interpretation into a new whole (Noblit & Hare, 1998; Smit et al., 2020). This iterative process of abstraction and interpretation, which is akin to layering significance, provided us with new insights into transformational methodologies for tourism sustainability. The core elements of these insights are written in italics in Table 2 below. Next, a comprehensive overview is presented and discussed.

Results and discussion

Through our MES, we identified five key methodological requirements: (1) co-creating actionable knowledge, (2) establishing safe spaces, (3) challenging power structures and managing emerging tensions, (4) shaping systemic synergies and (5) blurring the lines. In this section, we explore these requirements, illustrating how they can be seen as conditions for co-designing interventions for sustainable-tourism transformations. We also discuss to what extent the tourism literature aligns with the sustainability literature and possible critical aspects. Our synthesis demonstrates the

Table 2. Key concepts and interpretations.

| Key concepts | Second-order interpretations | Third-order interpretations | |
|---|---|---|---|
| Context and method(s) | The methodologies are <i>collaborative and transdisciplinary</i> ; they focus on allowing new narratives, attitudes and values to emerge. These can then be acknowledged and reshaped through negotiations and consensus building. | Processes of <i>actionable knowledge co-creation</i> are shaped by social interactions and the alternative ways of making sense of reality (sense making) emerging from this co-creation. The focus is on agency; the paradigm is constructivist. | The transformative aspect of collaborative methodologies seems to come from the core belief that <i>knowledge is created</i> from social interactions among actors and their sense making. New values, attitudes and narratives emerge and coalesce in new practices. |
| Knowledge types: descriptive analytical, normative and instructional | The different types of <i>co-created knowledge</i> promote systems thinking, which is the foundation for actionable knowledge to produce <i>solutions</i> . | <i>Co-creating knowledge</i> to transform a system towards sustainability requires a <i>shared vision</i> , which can be achieved by creating a <i>safe space</i> aimed at building mutual understanding and positive <i>synergies</i> . | The <i>co-creation of actionable knowledge</i> is a transformational approach in and of itself (outcome), and it can generate transformative results (medium). |
| Collaboration: structures and power relations, as well as types of process directionality and intentionality | Collaboration challenges traditional hierarchies and <i>power structures</i> ; it levels <i>power dynamics</i> by creating a <i>safe space</i> for exchange, where <i>co-created knowledge</i> flows and new meanings are constructed. Collaboration can initiate the implementation of sustainable practices. | | <i>Knowledge co-creation</i> and the co-design of interventions are forms of engaged collaboration that can promote sustainability transformations. Collaboration should occur in a <i>shared space where power dynamics are balanced</i> . Participants strive for equal representation across roles and hierarchies, and <i>lines are blurred</i> . Opportunities for transformation arise. |
| Participant roles: researchers, practitioners, facilitators, students and additional stakeholders | Collaborative methodologies can <i>bring together research and practice</i> by creating a <i>shared safe space</i> for knowledge co-creation and redefining roles along more horizontal lines, as <i>blurring the lines</i> of roles seems to create a stronger common voice and shared narratives. | The process of <i>consensus building</i> increases complexity, and <i>tensions and conflicts</i> might arise; however, the democratisation of the process and the inclusion of alternative perspectives are crucial for ensuring sustainable change. Sustainable transformations are developed in complexity. | As hybrid roles emerge and traditional <i>power structures are challenged</i> , deeper reflections on these changes in positionality are needed regarding the power and interests of stakeholders. At the same time, introducing change in collective behaviours able to reinforce sustainable practices can <i>generate tensions and conflict</i> and is often met with <i>resistance</i> , though this topic is not adequately addressed. |
| Outcome: tangible and intangible solutions | The methodologies target mostly <i>individual agency</i> . Through <i>knowledge co-creation</i> , positive <i>synergies</i> are shaped, inclusion is promoted, barriers to participation are lowered, innovative and creative thinking is applied to identify solutions and interventions are aimed at transformations. | <i>Collective practices</i> are not always in focus. Actionable knowledge is understood and accepted as the result of the collaborative process, but <i>an extensive assessment of large-scale implementation is absent</i> . | While there is evidence of transformative processes at play, there is a <i>lack of evidence</i> of transformative results that deliver radical systemic changes towards sustainability. |
| Leverage points: parameters, feedback, design and intent | <i>Co-creating actionable knowledge</i> means democratising knowledge and <i>transforming</i> | At the microlevel (individuals), collaborative methodologies show transformative potential. New thinking and | The deconstruction and reconstruction of narratives, attitudes and behaviours have an impact at the |

(Continued)

Table 2. Continued.

| Key concepts | Second-order interpretations | Third-order interpretations |
|--------------|---|--|
| | <i>stakeholders into agents of change who act as a collective unit.</i> | <i>new doing emerge and coalesce as potentially radically new practices. However, at the macrolevel (systems), the paradigms are not openly challenged.</i> |
| | | <i>individual level. This study can speculate on, but cannot assess, how this impact translates into collective agency and/or larger paradigm shifts; more research is needed.</i> |

requirements' interconnected nature and how they establish a *modus operandi* for sustainable-tourism research and practice, providing the means and manner for driving sustainable change in tourism. To highlight the latter, we end this section with the study's implications.

Co-creating actionable knowledge

The articles suggest that the co-creation of actionable knowledge is critical for transformational methodologies because its dual role as a transformational outcome and medium makes new practices emerge from collaborations (e.g. Table 2, rows 1, 2, 4, 5 and 6). During the translation phase, we observed that most authors mentioned new understandings, perspectives and attitudes as outcomes of knowledge co-creation. For example, Liburd et al. (2020, p. 2311) wrote that during their workshops, some empowering attitudes emerged ('We have to dare to believe in ourselves'). Koens et al. (2022) noted that their use of games made participants more aware of the complexities of urban-tourism planning. Some authors observed that actionable knowledge developed learners' capacity for linking experience with sense making and reflection with action (Duedahl, 2021; Koens et al., 2022); as a medium, it supported stakeholders in establishing networks, developing shared visions, gathering resources, and negotiating solutions, concrete roadmaps and action plans. A good example is the study by Arias and Kieffer (2023) about the construction of sustainability indicators for community-based rural tourism. Another example is the initial development of a shared vision and the final elaboration of a Gantt chart for collaborative actions by the workshop participants in Bertella et al. (2021).

In the sustainability literature, actionable knowledge is considered essential (Fazey et al., 2018) as its co-creation fosters reflexivity over actions, choices and experiences; it also helps 'those with a stake in an issue to see their own problems more clearly and to take intelligent action, with others, in response to their shared learning' (Bradbury et al., 2019, p. 6). Our synthesis shows that some tourism scholars are implementing actionable knowledge co-creation, usually in the form of projects. This implementation is not presented as being always effective due to challenges concerning the relevance of the actionable knowledge to sustainable solutions. For instance, Bertella et al. (2021) found that although the co-creation process they studied resulted in a new network, the participants' lack of creativity prevented the identification of truly innovative sustainable solutions.

Establishing safe spaces

Methodologies are more likely to foster transformational change when they establish safe spaces (e.g. Table 2, rows 4 and 5). The articles point to the creation of safe spaces for practitioners as potentially enabling an approach that (1) challenges traditional ways of learning (Bertella et al., 2021; Koens et al., 2022), (2) enables shared understanding (Duxbury et al., 2021; Liburd et al., 2020), (3) allows the design of innovative solutions (Jernsand, 2019; Phi & Clausen, 2021), (4) facilitates the democratisation of co-design processes (Lalicic & Weber-Sabil, 2021; Wengel et al., 2021) and (5) promotes the inclusion of marginalised groups or individuals (Arias & Kieffer, 2023; Wengel et al., 2019). The articles provide several examples of different safe spaces, which can be conceptual

(Chatkaewnapanon & Kelly, 2019), interactive (Koens et al., 2022) or structured around courses (Phi & Clausen, 2021), workshops (Arias & Kieffer, 2023; Bertella et al., 2021) and living labs (Duxbury et al., 2021; Jernsand, 2019). Scuttari et al. (2020) and Duedahl (2021) focused on placemaking as a process, showing how safe spaces can consist of processes that function as dynamic arenas where narratives are reconstructed and new practices unfold.

The literature on sustainable transformations emphasises the importance of identifying real-world spaces for learning, innovation, experimentation and the co-designing of interventions to facilitate the transformation of systems toward sustainability (Fischer & Riechers, 2019; Miller et al., 2014). Safe spaces are more than mere locations; they represent a mindset that encourages openness, inclusion and participation (Bentz et al., 2022). This is widely recognised in the articles, which also contain critical reflections on the need to carefully select stakeholders (e.g. stakeholder analysis; Bertella et al., 2021) and consider engagement techniques (e.g. visual art; Chatkaewnapanon & Kelly, 2019). These aspects should be grounded in openness and inclusiveness.

Challenging power structures and managing emerging tensions

Transformational methodologies challenge traditional power structures and dynamics. This can create tensions and conflicts, potentially hindering the transformational processes (e.g. Table 2, row 5). In the articles, we observed how transformational methodologies drew attention to the rules, norms and behaviours that influenced socio-ecological tourism systems and provided new ways of negotiating their construction (Chatkaewnapanon & Kelly, 2019; Duxbury et al., 2021; Lalicic & Weber-Sabil, 2021). For example, Phi and Clausen (2021) showed how tacit, shared norms about social behaviour in Scandinavia undermined innovation when reporting the tensions related to new practices. Other examples are the studies by Bertella et al. (2021) and Scuttari et al. (2021), who noted that traditional forces (top-down approaches, command-and-control mechanisms, stakeholder selection and engagement, and formal power and knowledge structures) tended to prevail over trust in the process, the co-designing approach and participants' creativity.

The sustainability literature tells us that challenging power structures is a fundamental condition of sustainable transformations because it questions the entrenched norms and hierarchies that often dictate the direction and nature of change (EEA, 2018). Moreover, individual and collective values significantly influence perceptions of what can be changed and how, thus influencing the identification of acceptable and viable solutions (Horcea-Milcu et al., 2019). Our synthesis shows that, while they address power-related issues of participation and representation, tourism researchers often lack the skills and resources to navigate tensions emerging from power relations and uncover and solve latent conflicts. This is stated by Arias and Kieffer (2023), who reflected on the possibility that participatory processes might exacerbate conflicts, thus making democratic approaches counterproductive.

Shaping systemic synergies

While the articles discuss individual-level changes, they do not document collective transformational agency that can significantly alter systems' trajectories (e.g. Table 2, rows 6 and 7). They mention system-level issues, trends and paradigms as the result of participants gaining new insights into the problems they try to address, but there is no focus on identifying alternative perspectives or negotiating solutions that target core paradigmatic dimensions (Chatkaewnapanon & Kelly, 2019; Koens et al., 2022; Tourais & Videira, 2021). For example, concerning urban-tourism planning, Koens et al. (2022) emphasised a deeper understanding of the complexity of tourism sustainability among stakeholders, but they did not provide evidence of transformational interventions or collective practices. This is also the case for other studies. Duxbury et al. (2021) indicated that stakeholders collaborating to design policies deconstructed and reconstructed their worldviews. Liburd et al. (2020) commented on stakeholders who promote a new, collective form of caring. Wengel et al.

(2019) used the Ketso tool to co-create an action plan for accessible tourism and advertise it through a documentary. These three articles promote the synergistic virtues of collaboration and examine forms of stewardship that cannot be qualified as transformational. Bertella et al. (2021) concluded that despite altering individual perspectives and framing a shared vision, stakeholders' collective agency failed to prioritise socio-ecological concerns over economic drivers, demonstrating a narrow focus on tourism's commercial dimension.

The sustainability literature on leverage points claims that values and beliefs hold the key to transforming worldviews and mindsets, which shape the goals of the system and the paradigms from which it arises (Abson et al., 2017). Transforming the way individuals see themselves and the world has profound implications for sustainability transformations; it enables the redefinition of relationships with people and nature (Bentz et al., 2022). Our synthesis suggests that transformational methodologies still struggle to create the necessary synergistic links across the different levels of the tourism system and across different systems.

Blurring the lines

The articles show that using transformational methodologies blurs the lines around the roles, responsibilities and expertise of the various stakeholders and fosters a shift from hierarchical structures to horizontal, collaborative ones. Once these lines are blurred, new practices are performed, and new possibilities emerge for sustainable transformations (e.g. Table 2, row 5). Several articles suggest the need to redefine roles along more horizontal lines so that participants are equally engaged in knowledge co-creation and intervention co-design regardless of their positions in the system. For example, Phi and Clausen (2021) employed a transdisciplinary approach involving innovation, design, sociology and a pedagogy that increased student engagement with social issues, with projects continuing outside the classroom. Similarly, Jernsand (2019) put transdisciplinarity into action by supporting the development and diffusion of sector and context-specific sustainable practices. Duxbury et al. (2021) explored role redefinition in detail, showing that when done systematically, blurring the lines and going beyond traditional roles represent unique opportunities to overcome structural barriers to transformation, nurture a sense of shared responsibility and promote the development of products, business models and networks.

Our synthesis shows that the tourism literature aligns with the sustainability literature, which suggests that blurring the lines creates a stronger common voice and that when possible, stakeholders are willing and able to take the lead and implement co-designed interventions (Wiek et al., 2011). From a systems perspective, blurring the lines also makes addressing deeper leverage points easier because it disrupts stakeholders' mental models and relational patterns (Abson et al., 2017; Fischer & Riechers, 2019). Blurring the lines is a precondition of the effective co-design of interventions for sustainable-tourism transformations as it challenges assumptions regarding power, resources, influence and responsibilities; in doing so, it fosters more balanced participation. As such, it is fundamental for achieving a more just representation of diverse voices (Bertella, 2022; Jamal & Camargo, 2014), challenging the compartmentalisation of academic knowledge and including alternative and experiential forms of knowledge (Farsari et al., 2023). Importantly, our synthesis shows that little attention is paid to the issue of how researchers who are open to different knowledge forms can retain their salience, credibility and legitimacy, which is found in the sustainability literature regarding the need for boundary work (Andrews et al., 2024). Given the worrying proliferation of fake news and self-proclaimed experts, this aspect is extremely important.

Practical and theoretical implications

Individually, each of the requirements offers significant methodological insights into the means of transformation; taken together, they suggest a manner of transformation (Abson et al., 2017; Bentz et al., 2022), which is a set of unifying principles to guide the co-design of transformational

Table 3. The core elements of the proposed modus operandi.

| Methodological requirement | Function | Purpose | Process | Challenges | Transformative impacts of the modus operandi |
|----------------------------------|---|--|--|--|---|
| Co-creating actionable knowledge | Enhances sustainability thinking and agency. | To develop practices from collaborative processes. | Developing collective understanding and action capacity. | Participants' limited creativity and trust in the process. | Directly enhances sustainable practices through the generation and application of targeted knowledge. |
| Establishing safe spaces | Promotes shared understanding and the design of solutions. | To foster inclusion and lower participation barriers. | Creating inclusive, balanced environments. | Resistance to nontraditional methods. | Creates inclusive environments that foster participation and innovation, thereby facilitating open dialogue. |
| Challenging power structures | Addresses system norms and behaviours. | To address structural issues and manage complexities. | Democratising decision-making processes and challenging norms. | Potential tensions and resistance to change. | Shifts power dynamics and promotes democratic and equitable decision-making, which is crucial for systemic change and effective transformation. |
| Shaping systemic synergies | Implements multi-level interventions and scales up their impact. | To manage complexity and facilitate comprehensive systemic change. | Addressing system-level issues, trajectories and trends. | Difficulties (incl. limited resources) in moving from individual to collective to systemic change. | Bridges individual actions and systemic changes, emphasising the critical role of understanding and influencing system interconnectedness. |
| Blurring the lines | Encourages new approaches that transcend conventional boundaries. | To challenge traditional roles and find innovative solutions. | Focusing on transdisciplinary collaborations and questioning given roles and responsibilities. | Rigid, structural and hierarchical barriers, as well as vested interests. | Encourages role adaptability and transdisciplinary collaboration, which dissolves traditional boundaries and generates innovative approaches and solutions. |

sustainable tourism interventions. We refer to this set as a *modus operandi* – a way of doing and thinking collectively that is reflexively reproduced through practice.

Our MES demonstrates that each of the requirements contributes to sustainable tourism with functions and processes for specific purposes and faces particular challenges (Table 3). Our study introduces a novel approach to sustainable-tourism transformations by treating the five requirements as an integrated whole that transcends their individual contributions to provide a comprehensive ‘manner of transformation’ (Bentz et al., 2022). The resulting *modus operandi* offers a set of practice-oriented, impact-driven principles to address the dynamic, complex and political facets of sustainable-tourism transformations. The usefulness of this *modus operandi* depends on its adaptation to diverse contexts and across scales, as well as on communities’ capacity for critical self-assessment. Success also hinges on its continual refinement and application to varying tourism scenarios, with particular attention to its adoption in specific milieus. As Bentz et al. (2022) explained, the transformation journey is influenced not only by our participation in such journey but also by the means we adopt and the way we engage.

Conclusion

We conducted an MES that harmonised the nascent methodological contributions to sustainable-tourism transformation research. We identified five methodological requirements as unifying principles, which were presented as a *modus operandi*. In doing so, we established a foundation for impactful, practice-oriented research. This contribution bridges the gap between the theory and practice of sustainable transformations in tourism, offering actionable guidance, through methodological innovation and collective action, on how to facilitate the effective co-design of interventions. By emphasising the interconnectedness of the requirements and their collective impact, we address the dynamic, complex and political facets of sustainable-tourism transformations to reduce the resistance to embracing transformational thinking in sustainable-tourism research. This resistance is particularly evident in the widespread acknowledgement of issues of power in tourism research and the few attempts to address these issues with tangible strategies, which indicates a strong need for more critical contributions. The adoption of our *modus operandi* can help scholars and practitioners support transformational processes, advance research and contribute to sustainable-tourism transformations.

We identified some critical aspects that deserve more attention in future studies adopting participatory methodologies for sustainable transformations. Although potentially useful, the examined methodologies were problematic in terms of truly sustainable changes due, for example, to the participants’ limited representativeness and the predominance of conservative stakeholders. To address this problem, tourism scholars should be better equipped with the skills and tools to manage group dynamics; alternatively, they should find partners who can support them, including professional coaches, trainers and workshop leaders from the private and third sectors. These partnerships could also help academics retain their role, thus meeting the challenge of compromised relevance that accompanies close collaborations with practitioners. Another challenge of the methodologies is the correlation between the transformation of individual attitudes and that of collective practices at the systemic level (Becken & Coghlan, 2024). In this case, evidence-driven, longitudinal studies strongly focused on the mapping and evaluation of interventions in tourism systems can provide important insights into how to engage with systemic interdependencies.

This study has limitations concerning its scope and time frame. Significant studies falling outside the selection criteria might have been overlooked. These criteria excluded grey literature, book chapters and conference proceedings, which are valid sources of knowledge concerning initiatives at the intersection of academia and industry (e.g. practice-oriented research). As the literature matures, future systematic reviews and bibliometric analyses may provide a more nuanced picture of sustainable transformations in tourism.

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