

# An Environmental Social Marketing Intervention in Cultural Heritage Tourism: a Realist Evaluation

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## **Abstract**

Following Pawson and Tilley's principles of realist evaluation and the *context-mechanism-outcome* (CMO) framework, this paper conducts a process evaluation of an environmental social marketing intervention in a heritage tourism organisation. Social marketing and employee environmental interventions have received relatively scant attention in tourism. Additionally, prior literature mostly focused on the evaluation of intervention outcomes (i.e., how far the intervention produces precise targeted outcomes) and ignores the importance of process evaluation (i.e., identifying what works, for whom, under which circumstances and how, plus issues of intervention maintenance). This paper fills this literature gap using realist evaluation theory and academic perspectives, as well as via the reflections of practitioners involved in intervention design and delivery. Findings suggest that a good understanding of the tourism and organisational *context* (regarding the dimensions of structure, culture, agency and relations) and the use of tailored, action-focused *mechanisms* (for each context dimension) are critical to achieving transformational *outcomes* in environmental interventions in cultural heritage organisations. Based on these findings, it is concluded that the CMO is a useful framework for assessing environmental social marketing interventions in tourism (both for heritage and other tourism organisations). Implications for tourism practice and further research directions are also discussed.

**Key words:** process evaluation, realist evaluation, context-mechanism-outcome, environmental intervention, cultural heritage tourism, social marketing.

## Introduction

Sustainable and responsible tourism has broadly embraced marketing (Caruana, Glozer, Crane, & McCabe, 2014; Chhabra, 2009) but one area of marketing that has received relatively scant attention is social marketing, which uses marketing techniques and strategies to encourage behaviour change and to benefit society (Lee & Kotler, 2015). Where social marketing has been used in tourism, the focus has been on demarketing tourism and tourists' sustainable behaviour (Hall, 2014; 2016). Sustainable and responsible tourism have also focused on corporate social responsibility (CSR) (Nicolau, 2008), particularly environmental issues (Font, Walmsley, Cogotti, McCombes & Häusler, 2012). However, CSR research in this area has generally focused on the environmental behaviour of tourists (Cheng & Wu, 2015; Dolnicar, Crouch, & Long 2008; Miller, Merrilees, & Coghlan, 2015) and marketing managers (El Dief & Font, 2010). This reflects the focus in mainstream CSR, which generally overlooks the micro level of environmental behaviour within organisations i.e., the employees. It is at this micro level that social marketing and CSR join forces, in the understanding of and in conducting interventions <sup>1</sup> to encourage employees' pro-environmental behaviour. Some work has begun to look at this area (Chou, 2014; Wells, Manika, Gregory-Smith, Taheri, & McCowlen, 2015) but much is still to be understood. Important progress has been made in the hospitality sector: Zientara and Zamojska, (2017) present a useful summary.

Understanding employee behaviour towards the environment helps the process of marketing pro-environmental thinking to them as on site agents. It can also help employees to market sustainability messages to their visitors, a process discussed in Warren, Becken and Coghlan (2016).

In the field of social marketing interventions, a clear distinction must be made between process evaluation and outcome evaluation (Linnell, 2014). Existing frameworks such as Lee and Kotler's (2015) Social Marketing Planning Process and McKenzie-Mohr's (2011) Community Based Social Marketing Planning Process include stages dedicated primarily to outcome evaluation. However, practitioners and researchers alike are starting to propose a new view on what needs to be evaluated to allow a deeper, and more broadly useful

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<sup>1</sup> In this paper, the terms intervention and programme will be used interchangeably.

assessment of interventions. This paper, therefore, focuses on this process evaluation, which prioritises the process rather than the outcome(s) and highlights “the types and quantities of services delivered, the beneficiaries of those services, the resources used to deliver the services, the practical problems encountered, and the ways such problems were resolved” and it is particularly “useful for understanding how program impact and outcome were achieved and for programme replication” (Linnell, 2014). Therefore, through the focus on process evaluation this paper fills a gap in both social marketing and tourism literatures in the context of employee pro-environmental interventions and behaviour.

Firstly, this paper contributes to prior literature by conducting a detailed process evaluation of a social marketing sustainability intervention within heritage tourism. This process evaluation builds on a prior outcome evaluation, the details of which can be found in Wells et al. (2015), and is conducted from two perspectives – academic (i.e., via realist evaluation theory) and practitioner (i.e., reflections of practitioners involved in the intervention design/delivery). The process evaluation takes an interdisciplinary perspective consistent with the view that “research on sustainable tourism within society is increasingly likely to examine it through the use of ‘critical’ assessments that draw on general social science approaches, theories, and concepts” (Bramwell & Lane, 2014, p.1). Specifically, the process evaluation of the social marketing intervention within heritage tourism was undertaken by employing Pawson and Tilley’s (1997) realist evaluation theory and applying their “trio of explanatory components” (p.77) also known as the context-mechanism-outcome (CMO) framework<sup>2</sup>. This builds on the proposed case for critical realism, which has been made in the context of tourism research by Platenkamp and Botterill (2013). It will be the first of its kind.

The present process evaluation utilises a case study approach of an environmental intervention within a cultural heritage tourism organisation, which was designed and delivered by social marketing practitioners from Global Action Plan (GAP – a leading UK environmental behaviour change charity, which designs and leads environmental behaviour changes interventions in workplaces, communities and schools; <http://www.globalactionplan.org.uk/>). None of the authors of this paper are GAP practitioners involved in the design or the delivery of the intervention). The intervention took a downstream social marketing approach, focused on influencing individual employee behaviours within the heritage organisation such

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<sup>2</sup> In some research papers and studies (e.g., de Souza, 2013), this is referred to as the “context-mechanism- outcome configuration (CMOc)”.

as changing energy use (i.e., lighting and heating) and recycling (i.e., waste reduction) behaviours. This was delivered via a ‘Sustainability Toolkit’ (containing information from line managers, stickers, posters, newsletters) and which could be tailored according to the needs and infrastructure of the locations where the intervention (four sites and the head office of the heritage organisation). Based on a field experiment methodology (Bamberg, 2002) undertaken by GAP practitioners, the intervention was a success and saved 1,888.42 kWh at site-level over a period of one year (equating to a £255.31 saving) as well as resulting in attitudinal and behavioural outcomes (for full details see Wells et al., 2015). However, the focus of the current paper is the realist evaluation of the process and, therefore, data from a range of sources are used: (1) qualitative data collected prior the intervention (this secondary data was collected by GAP practitioners as part of their design, delivery and outcome evaluation); (2) documentary evidence (i.e., GAP’s practitioner report to the client heritage organisation); and (3) qualitative interviews conducted by the authors of this paper with the GAP practitioners who developed and delivered the intervention. This was used to provide a practitioner reflection on the process of designing and delivering the intervention.

Secondly, the paper contributes to prior literature, with a discussion of the implications of using CMO in the tourism context (both heritage and broader tourism) for evaluating similar interventions and with recommendations for future research. Next, the paper will review the relevant literature, followed by the methodology, analysis and results.

## **Literature Review**

### ***Social Marketing, Pro-Environmental Behaviour and CSR in Tourism***

Social Marketing is defined as “the systematic application of marketing alongside other concepts and techniques to achieve specific behavioural goals, for a social good” (French & Blair-Stevens, 2007, p.32) and as “an approach used to develop activities aimed at changing or maintaining people’s behaviour for the benefits of individuals and society as a whole” (Hopwood & Merritt, 2011, p.4). Social Marketing has been used to tackle a wide-range of social issues including general pro-environmental behaviour (PEB) (McKenzie-Mohr, 2000), specific behaviours such as waste reduction and recycling (Mee, Clewes, Phillips & Read, 2004), water conservation (Dolnicar & Hurlimann, 2010) and energy saving behaviours

(Steg, 2008). Within the workplace, social marketing has been used to target and understand employee's PEBs (Smith & O'Sullivan 2012; Gregory-Smith, Wells, Manika & Graham, 2015) due to close relationships between employees and consumers (Coles, Fenclova & Dinan, 2013) and their responsibility for implementation of CSR strategy (Costa & Menichini, 2013).

However, the role social marketing plays in tourism is under-researched, especially related to employee's PEBs. For example, Chou (2014)'s study of employee environmental behaviour in tourism examined individual (environmental beliefs, personal environmental norms, self-reported environmental behaviour) and organisational variables (green organisational climate) as well as demographics to explain employee behaviour but did not examine the impact of an intervention/campaign. Only one paper has examined a social marketing campaign in tourism (Wells et al., 2015) and found that though it is a beneficial approach to influencing heritage organisation employees' pro-environmental behaviours, knowledge and awareness of environmental solutions are often lacking. Beyond these studies, little is known about the potential success factors for social marketing interventions within tourism; hence further evaluation and understanding is required.

### ***Evaluation: Outcomes versus Process***

Social Marketing has developed as a field over the last 40 years, but it is generally agreed that there is room for improvement in its practice and one of the most significant areas for development is evaluation (Biroscak, Schneider, Panzera, Bryant, McDermott, Mayer, Khaliq, Lindenberger, Courtney, Swanson, Wright & Hovmand, 2014). Increasingly, social marketers are focusing on evaluation (Polit, 2012), which is clearly an essential element, largely because of increasingly stretched resources and the need to demonstrate best value for money (Lister & Merritt, 2013). However, research into evaluation within social marketing is in its infancy and to date has largely focused on specific outcomes (e.g., reductions in water/electricity used, increases in amounts of paper recycled etc.) rather than taking a deeper and broader approach to evaluation.

One area of intervention evaluation research, which has developed more significantly, is that of public health interventions (Linnan & Steckler, 2002). Social marketing could learn much from the strategic and planned approaches, tools and methodologies available in this area.

Process evaluation is such an approach and it is particularly suitable for social marketing, as it has been demonstrated to be of value in intervention evaluations as wide ranging as drug/substance use/abuse (Harachi, Abbot, Catalano, Haggerty & Fleming, 1999) and workplace stress (Biron & Karanika-Murray, 2013).

Process evaluation is not concerned with whether a programme works or does not, but why and under what circumstances (Harachi et al., 1999; Saunders, Martin, & Joshi, 2005) it might work. It has been described as examining the “black-box” of an intervention (Saunders, Martin & Joshi, 2005) and focuses on implementation elements (which may explain variability in results), contextual elements and questions elements such as intervention practitioners’ self-efficacy, enthusiasm, preparedness and confidence and any bottlenecks or problems encountered (Hulscher, Laurant, & Grol, 2003; Harachi et al., 1999). It is the chance to “disentangle the factors that ensure successful outcomes, characterize the failure to achieve success, or attempt to document the steps involved in achieving successful implementation of an intervention” (Linnan & Steckler, 2002, p.1). Process evaluation can be used both formatively and summatively and provides input for future planning of interventions, or the application of an intervention in a different setting (Saunders, Martin, & Joshi, 2005).

Earlier process evaluation approaches were relatively basic and there is not a specified process evaluation framework that has gained attention in social marketing. Hence, this paper uses a more sophisticated approach, using realist evaluation theory, for a deep understanding of all evaluation elements (Moore, Audrey, Barker, Bond, Bonell, Cooper, Hardeman, Moore, O’Cathain, Tinati, Wight & Baird, 2014) and to assess the success of an environmental social marketing intervention. The realist evaluation focuses on the evaluation of the process, within which outcomes are only one element, and therefore is a superior method of evaluating interventions.

### ***Realist evaluation and the CMO framework***

Realist evaluation focuses on “what works for whom in what circumstances and in what respects, and how?” (Pawson & Tilley, 2004, p. 5). While a case for critical realism has been made in the context of tourism research (Platenkamp & Botterill, 2013), the principles of realist evaluation have been only recently and scarcely applied to tourism-related areas such

as heritage crime prevention (Grove & Pease, 2014), analysis of travel blogs (Banyai & Havitz, 2013) and community-based programmes (Nilsson, Baxter, Butler & McAlpine, 2016).

In this paper, the realist evaluation of an environmental social marketing intervention will be carried out using the *context-mechanisms-outcome* (CMO) framework, with a specific focus on the *context* and *mechanism* dimensions (detailed below). As noted earlier, this evaluation will be the first of its kind. A brief analysis of the *outcome* dimension will be included to reflect a general assessment. (Description of specific planned outcomes e.g., cost savings, energy savings, change in attitude and behaviour-related variables etc. can be found in Wells et al. (2015) as noted in the introduction). Subsequently, reflections on the lessons learnt and recommendations for tourism organisations are discussed.

In realist evaluation, *context* is described as the conditions under which the programme is introduced, works or has worked (Pawson & Tilley, 2004). These conditions are relevant to the choice and use of subsequent *mechanism(s)* as per CMO. The *context* includes elements such as interpersonal/social relationships, technology, economic conditions, location, demographics material resources, rules and systems (Pawson & Tilley, 2004). Context is an important aspect in heritage, tourism and sustainability/conservation research (e.g., Chabra, 2009; Wickham & Lehman, 2015) and Adger, Brown, Fairbrass, Jordan, Paavola, Rosendo, & Seyfang (2003) has highlighted the need for context-specific solutions in sustainability and decision-making research, while Nilsson et al. (2016) reflected on the numerous aspects of context (e.g., culture, logistics, knowledge/cognitions, time) that influence the outcomes of community-based conservation programmes e.g., natural parks, ecotourism, wildlife protection. Hence, a detailed assessment of the *context* is critical to the implementation, success and durability of an intervention in the tourism arena.

*Mechanism(s)* are those resources that enable/disable the programme subjects to make the programme work (Pawson & Tilley, 2004) and can be divided into structural, cultural, agential and relational mechanisms each of which will produce various outcomes (de Souza, 2013). *Outcomes* follow *mechanisms* in the CMO framework. The consideration of relevant mechanisms is also critical because programmes have to be designed in a way that will “activate the underlying causal mechanisms situated within pre-existing social structures to

generate change or a different potential existing within the action context” (de Souza, 2013, p.146).

*Outcome(s)* include intended and unintended consequences of the intervention, as a result of activating different mechanisms. Therefore, the outcomes of an intervention can show mixed patterns of behaviour. In a realist evaluation, unlike traditional evaluations, the aim is not to test hypotheses such as “does intervention x on subject y produce outcome z?” (Pullin & Stewart, 2006), but rather the focus will be showing which aspects of the programme are key for maintaining the programme and which ones were (not) useful or successful (Pawson & Tilley, 2004). The size of specific outcomes (e.g., financial/kwatt savings, return on investment, number of energy bulbs replaced etc.) are less important than the lessons learnt (Tilley, 2000).

## **Methodology**

This paper takes a case study approach to complete a realist evaluation of an environmental social marketing intervention with a focus on process evaluation in heritage tourism. In doing so, this evaluation also takes two perspectives, (1) academic (via realist evaluation theory) and (2) practitioner (via reflections of being on the front line of intervention design/delivery).

Case studies provide an up close and in-depth understanding of a case set within a real-world context (Yin, 2009), and are useful when asking descriptive (what is happening?) and explanatory questions (how and why did something happen?). This is aligned with the realist evaluation approach (Pawson & Tilley, 2004) and hence suitable for the present study (Yin, 2011). Case studies draw on multiple sources of evidence (Yin, 2011) as do process evaluations (Linnan & Steckler, 2002; Moore et al, 2014) and this study draws on hybrid data, using triangulated qualitative data (Edmondson & McManus, 2007). In this paper, both data triangulation and method triangulation are used (primary qualitative data from interviews with Global Action Plan (GAP) practitioners who designed and delivered the intervention and the employees of the heritage organisation who received the intervention; focus groups with employees of the heritage organisation and secondary data drawn from the official report). Through triangulation, the limitations and biases of using one particular methodology or just one stakeholder’s opinion are overcome (Decrop, 1999).

As a contribution, this paper focuses on the novel insights provided by the data gathered from interviews with the GAP practitioners who designed and delivered the intervention in the heritage organisation. These interviews sought to understand GAP practitioners' involvement with, and contribution to, the intervention, if and how they carried out the evaluation of the intervention, and their reflections on the process and decisions. This data is key to a realist evaluation of the intervention and to provide reflections on the lessons to be learnt and implications for tourism and social marketing. Individual semi-structured interviews that lasted 40-60 minutes were conducted with 3 practitioners. The GAP practitioners were: the managing partner (who liaised with the senior management of the heritage organisation and oversaw the strategic dimension of the project); the project manager (who developed the intervention, organised site visits, developed materials and delivered most on-site visits and training) and the project assistant/ambassador (who carried out on-site interviews and focus groups with the heritage organisation's employees). In the analysis below, the quotes from the GAP practitioners will be listed as P1 – managing partner; P2 – project manager; P3 – project assistant. Additionally, data from 57 separate heritage organisation employees (i.e. from 42 short individual interviews and 6 focus groups prior to the intervention) is used this paper. This included a range of full-time heritage organisation employees (e.g., site managers, shop assistants, office employees), seasonal staff and volunteers. The availability and the setting in which they were conducting their daily activities dictated the choice between the two methods. In this paper, the qualitative data from the heritage organisation's employees will be used to delineate the realist evaluation of the intervention in terms of its *context* and the enabling or disabling *mechanisms* (rather than their attitudinal and behavioural outcomes which are reported in a different analysis in Wells et al., 2015). Below, quotations from the heritage organisation employees will be referred to as E1, E2, etc. Finally, the official report to the heritage organisation management from the GAP practitioners (a secondary data source) was also analysed, and extracts from it will be signposted in the analysis below using the abbreviation OR.

A copy of the general protocol used in the interviews and focus groups with the employees can be found in Supplemental Material Table S1, available in the online version of this paper.

All the interviews and focus groups (from heritage organisation employees and GAP practitioners) were audio-recorded and transcribed verbatim. All the data were analysed using

thematic analysis (Braun & Clarke, 2006). More specifically, using Strauss and Corbin's (1990) guidelines three sequential coding procedures were used: open coding, axial coding, and selective coding. Following the emergence of new categories and themes, the data were continuously re-evaluated and re-organised by two coders, who used Pawson and Tilley's theoretical framework and definitions to resolve any differences. All the data analysis was aligned to the CMO framework and followed de Souza's (2013, p.149) elaboration approach. This approach focuses on analysing the context in terms of structure (with mechanisms including roles/positions, practices, resources, and processes), culture (with mechanisms connected to ideas/propositional formulations about structure, culture, agency, and relations), agency (with mechanisms related to beliefs and reasons for action or non-action), and relations (with mechanisms including mechanisms connected to duties/ responsibilities, rights and power).

## **Data analysis and Discussion**

Aligned with realist evaluation principles, the analysis below focuses on the process evaluation using the CMO framework, with particular attention given to the *context* and *mechanism* dimensions and a brief overview of process outcomes. This analysis follows de Souza's (2013) elaboration. Figure 1 provides a summary of the analysis and findings, which match the CMO elements breakdown (context-mechanism-outcome) and four dimensions for each of these (i.e., structure, culture, agency, and relations). The detailed analysis below as well as the summary present in Figure 1 is based on the qualitative data multiple sources (GAP practitioners, heritage organisation employees, and official report).

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Figure 1. Summary of CMO-based evaluation

### ***Context***

Regarding context, the data revealed several particularities of the structure of the heritage organisation. The practitioners described the organisation as having "...*properties* [which] *are all largely autonomous and operate individually*" (P1) but which also need to comply with head office sustainability-related guidelines/goals: "*they've set themselves a lot of*

targets, they got EMS [environmental management system] they are developing and embedding within all of the sites” (P2). However, at the site-level the priority was the visitor experience, not sustainability:

*“On a cold day if obviously it’s quite difficult for a visitor attraction, so during open hours to the public there will be doors open throughout the building.” (E7)*

The complexity of this structure and the different priorities was subsequently acknowledged by GAP practitioners, but there is little evidence that it was considered at the earlier stage of identifying mechanisms and designing the intervention; therefore, this may have affected intervention outcomes. Thus, the official report only acknowledges the challenge needed “to balance the demands of energy saving and visitor experience” in certain busy areas of the heritage organisation’s sites (OR, p.6). Additionally, in terms of job types, the organisational structure included a range employees such as full time, part-time, casual workers, volunteers, the latter proving to be less engaged and likely to be reached as they “are not paid [and] have erratic work hours” (P1). This probably affected the implementation of the intervention.

Other context-related issues noticed by GAP practitioners from their own assessment and discussions with the heritage organisation employees were: the age and heritage nature of the buildings that needed conservation considerations (P1); and the lack of recycling facilities (OR), which restricted some sustainable behaviours:

*“We can’t have gas in here because we are a sixteenth century building so it’s electric” (E4)*

*“...because of the castle’s historic nature we can’t do anything about the windows... [and] because of access we can’t have doors closed” (E5)*

When assessing the cultural dimension of the context, a similarly complex and disjointed culture of the organisation was noted, with “... lots of different entities of an organisation that have own individual cultures but also share a common [organisational] identity and culture...” (P1). Therefore, it was acknowledged that [The challenge was]...could we design something that would work across different sites and different areas and rely on them sharing the overall culture of the organisation?” (P1)

The aspects discussed above highlight the complex and somewhat conflicting organisational and cultural structures of the heritage organisation, as well as issues around the physical structure of the buildings. Therefore, GAP practitioners should have pondered and activated/deactivated the enabling/disabling mechanisms related to positions, practices, resources and culture. A thorough consideration of the potential and, more importantly, relevant mechanisms would have led to a better design of the intervention and ultimately to even a more successful intervention. Issues concerning organisational, cultural and buildings-related characteristics appear to be of particular importance to large and/or complex heritage tourism organisations, with multiple sites and distinctive features, as they are more likely to involve bureaucratic organisational systems with shared as well as divergent priorities, local practices and culture (Ashworth, 2000). Therefore, future environmental interventions in large heritage organisations should consider carefully these issues and ensure that a systematic assessment of the mechanisms is carried out in order to implement a suitable and bespoke environmental intervention.

Part of context, the agency dimension (i.e., relating to beliefs and reasons for action/lack of action) must also be evaluated pre-intervention. The project assistant who carried out the initial interviews with the heritage organisation employees commended some employees' receptivity to environmental behaviour change (P3) but:

*“Staff in the properties themselves had belief gaps. I am not sure people felt they could do very much. There was not too much awareness of how they as an individual impact on the energy use of the property” (P1)*

which meant they were less likely to be motivated to behave sustainably and probably less responsive to an intervention due to knowledge and beliefs gaps (P1, P3).

Similarly, there were issues regarding agency not only with employees working on sites but also at higher levels: *“The knowledge gaps at the management levels were more about how to we help people to change these behaviours, what steps do we take, what interventions do we need...” (P1)*. Other reasons for lack of action were job-related competing behaviours and priorities, as well as time constraints.

*“I do a reasonable amount but I try to keep it to the essential or where I really need to, partly because if I do too much I don't have time to get on with the actual work....time and convenience is a big element” (E10)*

Finally, as observed by GAP practitioners, some employees tended to compensate between behaviours as *“people felt they were doing something and therefore they tackled the environment or environmental issues...‘Well, I’m recycling already what else do I need to do?’ (P3).*

Based on the analysis of the agency dimension, the practitioners should have considered more carefully the mechanisms favouring employees’ reasons for actions and counteracting the reasons for non-action.

Finally, the relations dimension was also a most complex dimension of context. As per the pre-intervention interview with heritage organisation employees’, there was an issue related to their perceptions of duties and responsibilities, and the fact that employees did not see value in environmental initiatives. These were described as a *“move away from the conservation side of things and started to become more business-orientated, less respect for the property and the history of the architecture” (E3).* Some employees did not prioritise environmental behaviour due to other job tasks: *“I’ve got far more things to worry about [than energy use] ... [it’s]clients ... because we have [events] functions [so] very very busy night working” (E9).* Other employees noted environmental initiatives are the remit of site management and displayed a lack initiative or interest: *“I don’t actually get involved in anything like that, it goes to...the general manager” (E2).* Additionally, employees mentioned the lack of perceived ownership and ability or the rights to change:

*“We discussed before about the gardens department here making use of food waste for composting...I don’t understand all of the information about it myself, but I know that’s why we didn’t particularly go down that route....” (E6)*

The employee pre-intervention interviews also revealed some issues around power relations and alluded to tense relations with, and pressure from, the Head Office. Despite suggested support for the implementation of the environmental intervention from the Board of Directors, Head of CSR and the Head of Communications (according to P1), the project assistant also noted this tension and:

*“there were significant differences between different sites, between site managers...some under a great deal of pressure ... and who saw perhaps the interview as a bit of an inconvenience or they were quite defensive in some*

*respect. It was almost like they were being audited...perhaps they didn't really understand the focus of the interview. (P3)*

*"There was not too much awareness of how they as an individual impact on the energy use of the property; there was a sense of disempowerment." (P1)*

Therefore, the intervention should have considered enabling/disabling mechanisms connected to several aspects of the agency dimension (i.e., duties, rights and power) at intervention design stage.

### ***Mechanisms***

Several mechanisms related to the structure used by GAP practitioners during the intervention were identified following data analysis; only some mechanisms seemed well connected to the context analysis or applied fully.

Regarding role/positions and processes, a particular focus was given to mechanisms regarding communication. They were used by GAP practitioners to reach heritage organisation employees with different roles/positions and communicate to employees at site-level about environmental actions and behaviours. These communication mechanisms were designed to be multi-channel, personalised and to engage various types of employees, which was aligned with the context analysis that revealed a dual central and site-level culture and structure of the heritage organisation:

*"We had workshops at each of the different sites, we had remote support through calling and emails. A lot of the materials were delivered digitally and either printed locally or adapted locally" (P1).*

The data triangulation indicated the communication mechanism was the most developed intervention mechanism and that attention was paid to a wide range of aspects (i.e., messages, messengers, creative strategies, and communication channels). This is aligned with recent research on the communication of sustainability practices that have a positive effect on employees' organisational commitment and a negative effect on turnover intentions (Kim, Song & Lee, 2016). Heritage literature had mainly focused on general external communications strategies with visitors (e.g., Chhabra, 2009). Only recently, research into the role of communications for CSR purposes has started to emerge. Recent models of

communication of sustainability practices propose communicating with a range of internal and external stakeholders, including employees (see Wickham & Lehman's (2015) museums study). More generically, in the casino industry, Kim et al. (2016) found aspects of CSR (i.e., economic, legal, ethical, and philanthropic responsibility) and aspects of internal marketing (i.e., welfare system, training, compensation, communication, and management support) have a positive effect on employees' organisational commitment and a negative effect on turnover intentions (see also Zientara & Zamojska, 2017). This evidence concurs with the suitability of choosing a communications mechanism for the environmental intervention. However, overall there is limited research on the role of the internal sustainability communications for heritage employees, with the present paper making some initial contributions. Moreover, internal marketing communications using new media (e.g., email, intranet, internet), some of which are used in this intervention, have been highlighted as an effective tool for employee motivation and as a two-way communication that can enhance trust in the organisation and enable change of organisational practices (De Bussy et al., 2003). Nevertheless, this has not been examined in a heritage tourism context before the present study. Therefore, communication via new media tools could be beneficial to the employee interventions (Sanchez, 1999).

For ensuring better reach and success, GAP practitioners used highest impact targeting and selective behaviours mechanisms according to where more resources were used for heating, lighting and appliances, waste and catering (OR, p.12). As mentioned by the project manager (i.e., GAP practitioner):

*“we were trying to reach a little bit of everybody but there were key areas of the sites where we wanted to have a bigger impact – 1) the shops because that's where a lot of waste was being generated, both material/paper waste and food waste; 2) the key facilities managers were the people we wanted to engage with; 3) and any of the house-based staff so people who were actually based within the buildings themselves where there were issues like lighting and heating” (P2).*

These mechanisms appeared relevant to heritage organisation employees who performed certain behaviours as

*“...departments were very interested...because they had budgets that they had to keep to so if they could reduce their impact or reduce their costs in*

*terms of utilities then they might have more to spend on their other activities”*  
(P3)

However, no specific mechanisms were used to overcome some of issues revealed in the *context* analysis regarding perceptions of practices (i.e., complete site compliance with head office guidelines and goals; and site-level employees prioritising visitor experience over energy saving).

As per the *context* analysis, the organisation had a complex culture as both site-level culture and the broader (i.e. off-site level) organisational culture co-existed and conflicted sometimes. This means GAP practitioners should have considered activating/deactivating relevant mechanisms regarding ideas or formulations about culture. In response to this, two culture-related mechanisms have been employed. Firstly, a mechanism promoting the site-level/micro culture was used through the intervention toolkit, which was designed to allow a certain degree of personalisation to reflect stories, news and actions taking place at site-level. However, this toolkit could have been initially designed to reflect better the individual site-level cultures rather than delegating each site to adapt general guidelines. While it can be assumed that a coherent and unique overall organisational culture is required for an enduring and successful organisational identity and image (Jo Hatch & Schultz, 1997), recent research on the wine industry (Zamparini & Lurati, 2016) shows that it can be beneficial for strategic and competitive purposes for organisations to claim legitimate distinctive identities. This offers some support for the mechanism used in this intervention and its partial success. Nonetheless, more research is required in this area. The management and human relations literatures have previously examined the theme of micro-culture or subculture by looking into the reflection of subcultural differences in employees’ perceptions of cultural practices (Liu, 2003). However, this area remained unexplored in the field of cultural heritage. Even within broader tourism research, the focus seems to be largely on the generic organisational culture, mostly within the hospitality industry.

The second culture-related mechanism that was used in the intervention to motivate sustainable behaviour amongst heritage organisation employees was the mechanism appealing to conservation values, rather than mechanisms appealing to financial savings or incentives. The former were clearly shared by employees:

*“Yeah I think it would be money we’re saving in the long term but I would like to think it would be for conservation and environmental issues rather than money” (E8)*

While the motivation of the heritage organisation might have encompassed both (i.e., conservation as well as the environment needs money, so employees need to be informed about that, as the main reasons for the intervention and targeted behaviours).

In the heritage tourism literature, the employees’ conservation motivations are scarcely researched compared to those of tourists. However, a research stream on volunteers in heritage organisations confirms employees such as volunteers can be highly motivated by conservation concerns (i.e., the so-called “conservers” – Stebbins & Graham, 2004, p.27). Nonetheless, a barrier to enabling this values-related mechanism was the fact that *“there seem to be disparate views and ideas about sustainability” (P3)*. This is somewhat aligned with research from the wider tourism literature indicating that the pro-environmental behaviour of some managers is only partially explained by organisational environmental values, while their personal environmental values do not influence at all their pro-environmental behaviour (Dief & Font, 2010).

Moreover, while GAP practitioners recognise that *“the [heritage organisation] has a responsibility towards the environment, and they were clear on the link between sustainability and the [heritage organisation’s] core values” (OR, p.9)* this was not always recognised at the site-/employee-level, due to existing practices and priorities (the discussion in relation to context). As noted by both GAP practitioners and heritage organisation employees (P2; E1), employees’ longevity and commitment to the organisation could benefit the intervention. However, these ideas and views about the relations dimension were not further explored; neither mechanisms connected to these characteristics of culture have been used. Therefore, more attention should have been dedicated to identifying and using appropriate culture-related mechanisms by GAP practitioners.

Regarding agency, several mechanisms were used to tackle the reasons for lack of action and to boost employees’ existing reasons for action. Firstly, an educational mechanism was used to tackle the belief and knowledge gaps identified at the context analysis stage. Belief gaps such as *“we can’t change the lighting because it’s a listed building”* were tackled by using *“examples from other properties in the organisation that had done those actions” (P2)* and knowledge gaps with actions such as:

*“we did some focus groups...on lighting, with specifically different bulb types...LED, energy efficient lighting...heritage-designed LED lighting [and a person came to demonstrate]...getting them to think that ‘not all of your sites are heritage’, you do have modern parts where you do have more freedom so do things...often shops or visitors entrance spaces, ticket halls”*  
(P2).

The use of this educational mechanisms is aligned with past research that considers knowledge building is important in sustainable tourism (Cole, 2006), thought its results can be mixed and highly dependent on contextual factors (Nilsson et al., 2016). Nieves and Haller (2014) highlighted the role of employee’s knowledge in achieving dynamic capabilities in the hotel industry and, specifically, the importance of procedural organisational knowledge “which is linked to more routine processes [to] act as a reference to provide foundations for building learning processes to facilitate the introduction of changes” (Nieves & Haller, 2014, p.227), such as this current paper’s environmental social marketing intervention. As part of implementing this educational mechanism, *“a toolkit was designed to provide user-friendly information to staff and volunteers using the key communication routes: face-to-face team meetings [staff huddles] and the property newsletters”* (OR, p.2).

Additionally, a mechanism highlighting relevant non-monetary benefits to employees was used to encourage people to take action. This was done by converting the financial savings into visitor membership money equivalents:

*“rather than talking about energy saving as being £60 a year, which doesn’t sound like very much, we’d be expressing that as “one membership” and suddenly it is more tangible to people...or “just as signing up one person a day” and suddenly they’d go “oohh!!” and they can see the value in that cause they know how difficult it is to get those memberships but they cannot quantify money in the same way because they are not the ones paying the energy bills for that site”* (P1)

This mechanism was built on employees’ desire to prioritise visitor experience and conservation over financial savings, and it increased employees’ receptivity to the intervention and their desire to behave more environmentally-friendly. This choice is aligned with previous research findings (Marans & Lee, 1993; Lee, De Young & Marans, 1995) that found financial incentives do not motivate employees’ sustainable behaviour. In the context of heritage tourism, research about the most suitable types of employee incentives for pro-

environmental behaviour at the workplace is lacking. However, some studies in the field of nature conservation highlighted the use of tools as Total Economic Value (TEV) to assess the importance of biodiversity and ecosystem services to individuals/local communities. TEV incorporates a measure of “non-use values such as which include altruistic values (the satisfaction of knowing that other people have access to nature's benefits), bequest values (the satisfaction of knowing that future generations will have access) and existence values (satisfaction of knowing that a species or ecosystem exists)” (Christie, Fazey, Cooper, Hyde & Kenter, 2012, p.68). This agrees with the present research findings on the non-monetary/conservation-related benefits valued by the heritage employees.

Nonetheless, as per the previous context dimensions analysis, other agency mechanisms should have been considered/used i.e., mechanisms related to tackling competing job tasks and behaviours; mechanisms counteracting employees’ rationalisation techniques (Chatzidakis, Smith & Hibbert, 2006) and their green compensatory behaviours and beliefs (Gregory-Smith, Smith & Winklhofer, 2013).

The first relations-related mechanism used in the intervention was that of embedding sustainability into employees’ daily activities or particular events, so that eventually sustainability can become embedded in their job. This helped tackle the barriers related to competing workplace duties/responsibilities and issues around time pressure.

*“...we sent them all Christmas quiz questions that they could feed into activities that they were doing that were sustainability themed to nudge them and ask them to continue to take part in the programme.” (P2)*

This approach matches findings from hospitality that recognise the involvement of hotel management/staff<sup>[L]</sup><sub>[SEP]</sub> and a change in routines as success/failure factors in the adoption of environmental tools for sustainable tourism (Ayuso, 2006). Therefore, the present findings contribute to the scarce literature in this area and show how attempts to merge environmental practices with daily duties can pay off.

The second relations-related mechanism was the empowerment mechanism that aimed to deal with some of the relations-related issues, uncovered before the intervention and discussed previously. This mechanism was employed to overcome heritage organisation employees’ and site managers’ perceived lack of ownership, rights and ability to change things without

the Head Office approval, as well as to overcome the perceived lack of support from top-level management regarding site-level environmental goals or initiatives. This was largely achieved by allowing employees and site-level managers to participate in the local delivery of the intervention along with GAP practitioners and to tailor their internal marketing communications (i.e., to tailor the toolkit, emails, newsletters and other employee engagement methods). This supports the some theoretical assumptions made about the role of communications in the tourism and heritage context (see De Bussy, Ewing & Pitt, 2003), particularly related to new media communication technologies that “empower employees and contribute to the democratization of the workplace” (De Bussy et al., 2003, p.157). These findings also corroborate with some evidence that empowerment has found to be an effective tool for behaviour change in natural heritage locations i.e., programmes connected to ecotourism (Scheyvens, 1999) and conservation (Nilsson et al., 2016). Overall, in the case of the present case study, the use of the empowerment mechanism was concordant with the micro-culture of each site and has heightened the sense of autonomy in the decision-making process.

Despite the use of this mechanism, the context analysis revealed that one unresolved problem was the conflict between the duties/responsibilities and the prioritised benefits, as seen by the employees and top-level management in the heritage organisation (i.e., responsibility to the visitors’ experience and building conservation principles versus responsibility to cut costs and adopting a business model of running the sites and overall organisation). It should be also noted that given the interrelations between the context dimensions identified, the mechanisms identified and employed in the intervention at times tackle issues across context dimensions (e.g., the communications mechanism).

### ***Outcomes***

As mentioned before, the analysis of specific outcomes (e.g., cost, energy savings, change in attitude and behaviour-related variables) is not the focus of this paper (see details in Wells et al., 2015), but rather the evaluation of process (i.e., intervention design and delivery). The focus here is on learnt lessons regarding what works, for whom, under which circumstances and how (Pawson & Tilley 2004, p.5). While organisations and policy makers search for definite, “clear-cut” and “one-fits-all” answers/solutions, most realist evaluations of interventions offer partial answers and context-tailored advice (Pawson & Tilley, 2004, p.21);

which is beneficial for the present research within the heritage tourism context. Pawson and Tilley's (2004) guidelines on outcomes evaluation are used by answering the following questions to address this research gap.

*What worked?* Overall, the academic assessment carried out in this paper showed that GAP practitioners carried out a good evaluation of the four dimensions of context, according to de Souza's (2013) classification (even though not due to their knowledge of the framework but rather based their experience). Based on the qualitative data, several adequate mechanisms were identified and used in the intervention in response to the context analysis, with particular good use of the educational mechanism that tackled most of the employees' knowledge and beliefs gaps. The intervention involved heritage employees via hands-on activities (e.g., team huddles and the toolkit) while other elements (e.g., intranet and emails communications) required less participation and suited employees working in a non-office environment or volunteers. There was also a good selection of benefits that motivated heritage organisation employees' environmental behaviour.

*What didn't work and which aspects were not successful?* Some mechanisms were overlooked; therefore some of context-related issues were not tackled properly (see mechanisms section). For example, the issues around the complex and disjointed organisational culture and the existence of a micro-culture at site level, were only partially explored/dealt with. While not per se the focus of the environmental intervention, the issues related to culture were found to act as barriers. Additionally, a better assessment of the roles/job types, their requirements and how they might support or hinder the intervention should have been carried out and reflected in the intervention design. Compared to the employee level, little was done to tackle the knowledge gaps at top management level, except by providing some post-intervention information in the official report. The issue of compensation for green behaviours at work (e.g., recycling compensates for disregard of energy use) has also not been tackled through adequate mechanisms during the intervention.

*For whom it worked, in what circumstances and in what respects?* The intervention had both effective and less effective elements, leading to mixed outcomes. However, this does not minimise its benefits, which is consistent with Pawson and Tilley's (2004) view that intervention outcomes can show mixed patterns of behaviour despite overall intervention success. The intervention worked better for the employees who: focused on the non-financial

benefits of their environmental behaviour; were more receptive to behaviour change; did compensate between workplace green behaviours; were less time-constrained/pressured in their daily job; could be reached via multiple channels; and who were more likely to take environmental initiatives. However, the intervention targeted too many types of behaviours and employees, and could not reach or highly engage all employees e.g., volunteers.

*Will it have a long lasting effect and what aspects can enhance the long-term effects of the intervention?* The intervention relevance and durability has been enhanced by GAP practitioners who included the empowerment mechanisms and who allowed employees/sites to partially personalise the intervention. Nonetheless social marketing interventions effects are known to minimise as time passes (Lee & Kotler, 2015), which was also noted by GAP practitioners who lacked monitoring on some sites, leading to lower levels of involvement. Thus, monitoring could potentially extend long lasting effects, besides employee support, empowerment and regular feedback on their environmental behaviour. These could also enhance visitor experience.

*Should the intervention be deployed on a larger scale?* Overall, the intervention was successful and, thus, could be implemented across all the organisation's sites. However, the previously highlighted areas of improvements and outstanding issues should be addressed beforehand; only simple replication might lead to similar or less substantial results.

### **Recommendations for Tourism Practice and Future Research**

In the case of the environmental social marketing intervention discussed in this paper, the GAP practitioners largely focused on outcome evaluation rather than process evaluation; and they did not use any particular framework in the evaluation. Therefore GAP's own evaluation did not identify all relevant mechanisms that would have further enhanced the success of the intervention. Nonetheless, through the academic assessment carried out in this paper important lessons can be learnt and several recommendations can be made for tourism practice and future research.

Some mechanisms related to organisational structure were overlooked by GAP practitioners (i.e., negative attitude of each site towards complying with head office guidelines and goals;

and employees' predisposition towards the prioritisation of visitors' experience over environmental concerns). Open acknowledgement by heritage managers (at site, regional and national levels) of these attitudinal predispositions as enabling/disabling mechanisms should be considered in collaboration with practitioners and addressed in the development of environmental interventions. This is consistent with broader tourism and hospitality industry views (Kusluvan, Kusluvan, Ilhan & Buyruk, 2010, p.193) about the importance of internal consistency and complementarity to minimize internal conflicts, aside from being in line with the organisation's strategy, characteristics and competitive position.

Similarly, a better understanding of issues around organisational culture should be carefully assessed and considered. This is because the co-existence of a general organisational cultural and micro/site-level cultures could be detrimental to organisation's identity, image (Jo Hatch & Schultz, 1997) and its environmental initiatives, if perceived by employees to be in conflict with their priorities and environmental values.

A detailed consideration of context-related aspects (e.g., structure, employee relations and job requirements) is critical to heritage/tourism organisations, since these are likely to vary across organisations by sector, size, types of ownership, and service/product offering. Dewhurst and Thomas (2003) found motivations for environmental practices vary across types of small tourism organisations; and Garay and Font (2012) found these practices vary even within the same industry (i.e., accommodation enterprises). Therefore, it is vital for successful environmental interventions that heritage tourism managers should be receptive to and promote context analysis within their organisation and at each site.

Non-monetary benefits were selected as the mechanism for motivating employees' pro-environmental behaviour. These should be, however, implemented continuously by heritage managers for long-lasting effects. Additionally, drawing from lessons learnt in prior community nature-based conservation programmes, the most effective incentive type may vary by types of employees, stakeholders, organisations and countries, according to their level of development and cultural values (see Waylen, Fischer, McGowan, Thirgood & Milner-Gulland, 2010). Thus a thorough context analysis and, potentially, pretesting of alternative incentives, is needed.

Before conducting similar interventions within heritage tourism organisations, the type of compensation behaviour of green beliefs (as seen in the consumer behaviour/psychology literatures) and neutralisation techniques used by employees should be considered and used pre-intervention for employee segmentation within the organisation (see Gregory-Smith et al., 2015). Following this, it could be concluded that specific mechanisms (e.g., psychological and communication mechanisms to counteract different types of neutralisation techniques) should be used for each of the employee segments identified. Additionally, the intervention empowered the organisation's employees and managers at site-level to personalise and run tailored communications, indicating that future interventions should employ a co-creation approach to developing a sustainable cultural heritage product offerings (e.g., Gössling, Haglund, Kallgren, Revahl & Hultman's (2009) study on environmental values co-creation in the airline travelling context) and a participatory approach for successful behaviour change interventions (see Matthies & Krömker, 2000).

While a series of lessons have been learnt from this case study intervention, following Pawson & Tilley's (2004, p.5) realist evaluation perspective, interventions should be regarded as open systems, influenced by externalities such as "unanticipated events, personnel moves, physical and technological shifts ... practitioner learning, ... organisational imperatives, performance management innovations". Therefore, this will influence the ability of replicating similar interventions across similar organisations within the heritage or wider tourism industry. Consequently, the design and implementation of environmental interventions within the tourism must be accommodating, flexible, and follow a bespoke approach rather than "one-fits-all" approach (Manika, Wells, Gregory-Smith & Gentry, 2015). This tailored intervention approach should be built on a detailed assessment of the context, with perspectives drawn from all types of employees, managers and stakeholders such as visitors and local communities.

Regarding the limitations of this paper, more mechanisms and contexts are likely to exist and require further elaboration and action than the ones emerging from the data used here. Additionally, interviewer and single case study biases should be addressed in future research. Finally, despite the usefulness of de Souza's (2013) outline of how to elaborate and apply the CMO framework, it was found that its application to the present heritage organisation and intervention was not always straightforward. This is due to the overlap between context dimensions and types of mechanisms. Moreover, the classification of mechanisms portrayed

in this framework may not be always relevant across interventions and case studies, within the tourism context.

In conclusion, this paper offers the first ever process evaluation of an environmental social marketing intervention in cultural heritage tourism (i.e., identifying key aspects to intervention maintenance and which ones are useful/inappropriate, successful/unsuccessful). This is achieved via a case study methodology, using realist evaluation and the *context-mechanism-outcome* (CMO) framework, and via the reflections of practitioners who delivered the intervention. Overall, CMO is a useful framework for evaluating environmental interventions in tourism, which can lead to the development of clear recommendations for practice.

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