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Social learning communities of practice as mechanisms for sustainable tourism: a process tracing evaluation of a government intervention

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ABSTRACT

Many governments introduce interventions to help small enterprises adopt more sustainable practices. We used process tracing to evaluate how and why communities of practice and social forms of learning are key mechanisms to facilitate action-oriented sustainability learning. We subjected each piece of evidence to a contribution analysis, in addition to the probabilistic necessity and sufficiency, to affirm causal attribution and its strength. The study shows how learning is contingent on the context designed. Knowledge assimilation and behavioural change are more likely to happen when an intervention delivers structured resource-based training that is amplified with community support and peer interactions. Setting tangible routines and regular interactions that allow participants to gain knowledge and best practices through resource-based learning were necessary but not sufficient to promote change. This evaluation highlights the need to provide structured learning with tangible routines and regular interactions with peers (i) to leverage communities of practice to create a supportive social environment (ii) that introduce normative influences building a sense of peer accountability. Process tracing proved to be a useful methodology to compare the benefits of two learning approaches in the intervention, without the need for a control group.

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Sustainable tourism; social learning; communities of practice; evaluation; process tracing

Introduction

Organisational learning in small enterprises has been widely researched in all sectors, including tourism, and recent work by Martínez-Martínez et al. (2023) found significant links between knowledge management, organisational learning and sustainability. Sustainability learning is partly different from other learnings and poses challenges at organisational and destination level because it often contravenes traditional tourism thinking. A growth mindset underpins most tourism strategies (Conefrey & Hanrahan, 2022; Scott, 2021), yet growth may not always be sustainable. Changing mindset requires a sustained collective effort and concrete actions by all stakeholders in a destination, from policy makers to local communities. Networks play a pivotal role in sustainability learning as entreprises benefit from knowledge exchange through collaboration and cooperation (Baggio, 2011), and this can accelerate the diffusion and implementation of sustainability concepts at destination level (Dabphet et al., 2012). Trust in the community is what enables the transfer of tacit knowledge among small enterprises (McTiernan et al., 2021), while forming new social and professional connections can inspire out of the box thinking.

This study evaluates a sustainability behaviour change intervention to shed light on the underlying hypotheses of what makes it work, and to test how small enterprises engage with sustainability learning and new practices. As socialisation is key to small enterprises' learning, this study uses the communities of practice framework (Wenger et al., 2002) as a key concept that can facilitate social learning among participants. Existing literature identifies internal enablers and barriers to adopting sustainable practices, highlighting how most small enterprises adopt informal processes and some see benefits in engaging in formal programmes with other firms, while others do not. However, small enterprises adopting the same intervention may have different motivations and approaches to sustainability (Bonilla-Priego et al., 2022), which lead to different outcomes in the short-

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and long-term. To design successful interventions, policy makers need to better understand small enterprises' learning processes if they want to ensure that the target beneficiaries engage in certain activities and change their behaviour in the intended ways.

More research is needed to better understand how and what mechanisms facilitate or impede such change, for example by conducting evaluations of practice-based interventions. Often, interventions are designed to be politically appealing yet are not viable (Dixey, 2012), with assumptions about rational behaviour amongst participants that do not account for real-life complexities. More nuanced understanding is important not only to gain richer insights on what accelerates a sustainability transition among small enterprises, but also to better (re)allocate resources towards fulfilling participants' learning needs.

Furthermore, evaluations are often conducted post-intervention, when it is too late to introduce changes. Conducting a live evaluation ensures that findings are relevant to the present moment and lessons learned can improve the implementation of the ongoing intervention (Suno Wu et al., 2021) and future projects.

We use process tracing (Beach & Pedersen, 2019) to evaluate what created change (or not) in an intervention aimed at supporting small tourism enterprises in the uptake of more sustainable practices in the region of Barcelona, Spain. Process tracing is a qualitative method that allows researchers to explore potential causal mechanisms (i.e. descriptions of causal processes provided by participants or theorised by researchers and evaluators) through rigorous analysis, classification and testing of evidence, highlighting how multiple factors in a complex system contribute to an outcome (Beach, 2016). This provides a, or a set of, explanations of the course of events, connecting sustainability knowledge exposure to social interactions, knowledge assimilation and reinforcement. Our evaluation shows how owner-managers were able to learn by accessing resources and technical support to implement real changes through a structured programme that allowed them to focus on what was relevant to them, highlighting how both social support and peer pressure motivated participants to stay consistently committed and gain self-efficacy.

Literature review

While there is evidence that sustainability helps reinforce the capacity of enterprises to generate competitive advantage while caring for the environment and social welfare (e.g. Zaragoza-Saez et al., 2020), there is limited understanding of how to design effective interventions that facilitate the uptake of sustainability practices. This might be because evaluating sustainable tourism interventions is uncommon (Dredge & Jamal, 2015), evaluations are seldom published and thus lessons are rarely shared. There is no magic formula for all, and whether an intervention succeeds in achieving the desired outcomes depends on many factors, including the local context where activities are implemented. Nevertheless, design and monitoring are critical success factors within policy makers' control (Ika et al., 2010) that can be adjusted through ongoing evaluation. In this section, we first present common decision-making behaviours displayed by owner-managers of small enterprises, sustainability learning motivations and barriers to sustainability engagement. Then, we introduce the communities of practice framework (Wenger et al., 2002) and explain how this approach can provide a favourable context to support social learning amongst small enterprises, as well as how it may be incorporated into intervention design.

The tourism literature acknowledges that the owner-managers of small enterprises share characteristics that affect their decision-making and learning behaviour. For example, they tend to adopt informal processes both for business management and communication (Sampaio et al., 2012). This means that they often lack a systematic way to operate, which may lead to difficulties in changing their practices. Secondly, as their owner-managers engage closely with the local environment, they tend to acquire in-depth local knowledge and access tacit knowledge through practice-based activities (Hoarau, 2014). Zhang et al. (2015) suggest that such knowledge cannot be taught, but is acquired through socialisation with the local communities. Moreover, where these owner-managers get information from affects what they learn (Garay et al., 2017). In the case of limited information or low certainty, these owner-managers tend to conform with the behaviour of major stakeholders (Kornilaki et al., 2019).

There are some emerging patterns in the literature on learning sustainable practices. Garay et al. (2017) pointed out that the main motivations to adopt green practices are linked to care for the environment, financial benefits such as higher profits or cost reduction, better public image and reputation, as well as commitment to society. Generally, since small enterprises are often managed by the owner(s) of the business, their organisational behaviour is significantly influenced by the owner-manager's values (Sampaio et al., 2012). Although businesses are commercially oriented by nature, recent research found that priorities may differ for values-based small enterprises such as tourism lifestyle-oriented enterprises (Wang et al., 2019), which can be driven by ethics. Values-based small enterprises remain committed to both profit and

non-profit objectives (Tomassini et al., 2021) rather than prioritising only profitable outcomes.

Conversely, the barriers to sustainability engagement often revolve around small enterprises having limited time, money, workforce and skills. Invisible yet significant barriers to engagement may include rigid worldviews and low self-confidence or perceived personal agency of their owner-managers (Sampaio et al., 2012). However, individual barriers might be mitigated through social approaches to knowledge acquisition and exploitation. Relatedly, the self-efficacy of the owner-managers and contextual constraints of these enterprises have been recently investigated by Kornilaki et al. (2019) through the lens of social cognitive theory (Bandura, 2001), confirming previous studies on how informal relationships and proximity facilitate knowledge transfer and collaborations in local communities. Sustainability learning is more likely to occur in social circumstances that expose people to different ways of thinking and doing, providing room for dialogue, inspiration and change.

Considering the above, we suggest that the key to sustainability learning by the owner-managers of small enterprises is social learning within communities of practice. Individuals can learn alone at any point in time, but most tend to work together with a close circle of peers, clients and even authorities (Kornilaki et al., 2019). The social dynamics within groups enable members to learn and develop skills by observing what others do (Bandura, 2001), communities of practice that can be understood as 'groups of people who share a concern or a passion about a topic, and who deepen their knowledge and expertise by interacting on an ongoing basis' (Wenger et al., 2002, p. 2). The communities of practice approach can benefit policy interventions and drive institutional willingness to work closely together (Pyrko et al., 2017) by creating space for competence development via social learning. As Wenger (1998) explains, in social learning systems (such as communities of practice), learning and innovation are facilitated by having strong core practices that are shared and adopted by the members.

Due to the informal nature of community interactions, social forms of learning are advantageous for individuals with a high degree of autonomy within their enterprises. Ensor and Harvey (2015, p. 2) add that social learning emerges 'through practices that facilitate knowledge sharing, joint learning, and co-creation of experiences between stakeholders around a shared purpose', so that changes to practice extend to the community or system. Examples of learning can be found in collaborations between peer enterprises, which helps to fill tangible and intangible gaps (Czernek, 2017; Garcia-Rosell et al., 2019). Previous research suggests it can be useful to assess the levels of collaboration in a system and identify favourable conditions to cooperation (Baggio, 2011), which fosters trust while mitigating competition concerns (Czernek, 2017). For sustainability learning this is essential because sustainability is a paradigm that relies on the community aims and territorial features, so social engagement within communities of practice is crucial to form a shared mindset and solve challenges together. This approach emphasises consensus, sharing, participation and community engagement (Cambridge & Suter, 2005), which in turn fuels the social change that sustainability learning requires.

Policy makers can create favourable conditions for learning through continuous, organic interactions (Wenger, 2000). Social forms of learning accelerate sustainability transitions by encouraging not only knowledge transfer and spillover, but also creativity and trust building (Dias et al., 2020; Zhang et al., 2015). Further, social learning is likely to give more ownership and self-direction than top-down interventions, hence policy makers can design interventions where social norms encourage certain communal behaviours. First, to lower the entry barriers to sustainability learning interventions that foster a sense of community, governments can provide initial financial support as an incentive to join. Then, to weave communities tightly together, elements such as people, tools, routines and interactions (Wenger, 1998) can be intentionally promoted in the intervention design. For instance, introducing regular meetings and social situations that help people remember sustainability concepts or repeat certain actions are examples of contextual conditions that enable members to lean into these normative influences.

Regular social interactions within a sustainability-oriented community may introduce participants to new behaviours that are more sustainable and beneficial to the business (Kornilaki et al., 2019), while tacit knowledge assimilation might increase a sense of self-efficacy over time (Dias et al., 2020). Sustainability values are essential to adopt green practices, but not necessarily enough to maintain commitment in the long-term (Bonilla-Priego et al., 2022), hence being part of a community that shares similar values can reinforce such commitment. Normative influences could be used to create social expectations of a peer's performance (Kornilaki & Font, 2019), or lead them to follow social norms to avoid social sanctions (Bandura, 2001). Based on these insights, policy makers should then design an environment that fosters social learning alongside individual learning. Nonetheless, this task remains a practical

challenge in complex interventions such as in the field of sustainable tourism.

To date, there is limited understanding of how social interventions work in tourism, partly because evaluation activities are not yet consolidated in this field (Dredge & Jamal, 2015; Suno Wu et al., 2021). We need a greater understanding of how policy interventions can be designed to help communities to advance their sustainability learning and practices. As policy makers often seek to get a critical mass of participants to move forward at the same time, interventions naturally lend themselves to create social learning systems. Recent research has explored the process of social learning and concluded that this approach may benefit destination governance at a higher level (Islam et al., 2018). Through the evaluation of an ongoing intervention that supports sustainability learning, we trace the processes that are taking place in the intervention community for learning to happen. This is important because if we can shed light on how social forms of learning operate, other intervention communities in similar contexts can advance.

Methodology

This paper illustrates how process tracing can be a useful approach to evaluate an ongoing policy intervention by developing and testing theories about the causal mechanisms and influence of an intervention (Beach & Pedersen, 2011; Mahoney, 2012). Our research strategy is pragmatic (Friedrichs & Kratochwill, 2009), in line with the ontological and epistemological position adopted by Beach and Pedersen (2019) in using process tracing. As a qualitative, theory-based method, process tracing is often used to explain within-case inferences (Beach, 2016). The central element of the generative framework behind this method is the concept of causal mechanism, supported by Beach and Pedersen's (2019) explanation, for which a mechanism is the causal chain of factors and/or events linking an event X (e.g. a new policy being implemented) with outcome Y (e.g. policy recipients changing behaviour). These mechanisms are typically identified by researchers/evaluators through desk-based research and discussions with policy owners or provided directly by participants in the evaluation, in similar way to the development of log frames or Theories of Change. Mechanisms are typically broken down into smaller parts or steps that give rise to the following steps, each made up of entities (e.g. individuals, institutions, businesses) that perform or engage in certain activities (Beach, 2016). Process tracing, and a wider evaluation using this method, then involves collecting evidence (broadly defined) to test this causal mechanism. Process tracing is thus the empirical study 'of the traces that the activities associated with parts of the process leave within cases' (Beach & Pedersen, 2019, p. 38).

Process tracing helps evaluations because it connects evidence to claims in a systematic way, while recognising the complex nature of the real world. The strength of the evidence is not judged statistically, but by the probability of finding empirical observations within the given context (Befani & Mayne, 2014). Thus, the evaluator works in a similar way to a detective hunting for clues to increase confidence that a mechanism caused an outcome to occur in the hypothesised way. However, given the complexity of the social world, George and Bennett (2005) clarify that multiple causal chains might contribute to the outcome under scrutiny, hence process tracing allows for judgements on contribution of several factors rather than unique, direct attribution (Punton & Welle, 2015). In line with theoretical pluralism, these multiple factors might also be interdependent or temporally dynamic (Kay & Baker, 2015). A deeper discussion of causal assumptions and definitional issues around what is a cause or not, are beyond the scope of this paper. However, these issues are often debated at length, readers may find Waldner (2015) a useful introduction.

Case study

The Sustainability Commitment was started in the province of Barcelona in 2017, with the aim to enable tourism enterprises to improve their sustainability practices. At the time of writing, this voluntary intervention has over 650 members. The objective of the intervention is to enable sustainability learning on an individual and collective level. On an individual level, continuous learning is expected to be achieved through best practice manuals and expert consultants' advice, while on a collective level, networks of like-minded organisations are expected to drive the destination towards a sustainability transition. The supra-local government Diputació de Barcelona (DIBA) designed this intervention in collaboration with the Institute of Responsible Tourism and coordinated its rollout in the 11 counties that form part of the province of Barcelona. To implement such a large project, DIBA assigned each county's destination management organisation (DMO) the responsibility to organise and deliver activities adapted to their local reality.

In most counties, there is one DMO coordinator in charge of the Sustainability Commitment, who promotes the intervention to potential new members, assigns consultants to help enterprises tailor action

plans, and oversees the training sessions on offer. Representatives of the enterprises, usually their owner-managers, are required (i) to take part in at least two compulsory training sessions per year, and (ii) to provide evidence that their enterprises have achieved the goals they set in the action plans. Such evidence is uploaded on a Biosphere Sustainable platform that collects data on the enterprises' performance, including an annual audit on the overall practices by the consultants. The enterprises that pass the audit are awarded a certificate that acknowledges their Sustainability Commitment.

DIBA expected the intervention to enable enterprises to learn and implement sustainability practices by (i) providing a methodological framework with multiple tools (e.g. manuals, tailored action plans, training) to implement sustainability, and (ii) fostering a sense of belonging to a community (and destination) that is committed to sustainability. The expected outcome was that the enterprises would stay committed while new enterprises would join every year. The assumption behind the outcome is that the intervention continues to bring value by improving these enterprises' management and thus reducing operational costs, while improving their image for visitors, hence attracting more customers, increasing repeat customers, word of mouth recommendations etc.

Process tracing in practice

It is difficult to use statistical or experimental methods to evaluate policy initiatives (Wadeson et al., 2020) such as the Sustainability Commitment, where there is no control group. Process tracing provides evaluators a degree of flexibility in terms of data collection and allows us to explore hypothesised causal mechanisms through a rigorous methodology. The study was approved by the University of [XXX] Research Integrity & Governance Office, filed under reference number: FASS 20-21 127 EGA. As suggested by Beach (2016), we followed three steps to evaluate the evidence available: first, we created a list of empirical evidence that each mechanism to facilitate action-oriented sustainability learning was likely to produce (Step 1); second, we gathered and assessed empirical evidence against what we expected to find (Step 2); finally, we classified and assessed the reliability of such evidence to make causal inferences (Step 3). As part of the first step, documentary analysis, field observations and in-depth interviews with the policy makers who designed the intervention allowed us to break down how the intervention is expected to keep owner-managers committed to sustainability learning.

To fulfil the second step, evidence was collected through primary and secondary data collection across one year of fieldwork, where the lead researcher engaged with different stakeholder groups such as policy makers, DMOs, consultants and representatives of several enterprises. On top of conducting 26 in-depth interviews, she observed coordination meetings, training sessions and social events. The team gained access to archives of induction material, promotional content, records of action plans compiled by the enterprises, and consultants' reports. Feedback from owner-managers of these enterprises and comments from policy makers and DMOs were also used to trace the mechanisms connecting project activities to outcomes. As process tracing does not limit the type or amount of data used (Wadeson et al., 2020), we sought to conduct a comprehensive investigation and consider diverse clues to overcome data fragmentation. Familiarisation with the destination and contextual circumstances allowed the observation of relevant socio-political conditions and keeping track of changes manifesting at the destination, both in terms of implementation and outcomes.

While process tracing is normally used retrospectively on available data, in our case we complemented secondary data with primary data to gather further supporting evidence. By doing this, we approached the evaluation as an opportunity to shed light on what happened over the past five years, as well as to gain a deeper understanding of the mechanisms that may have evolved over time and are still underpinning the ongoing intervention. Thus, we collected data from the sources mentioned above included tangible pieces of evidence (e.g. financial records, action plans, certificates) as well as discursive feedback, observed behaviours, notes taken during social interactions and events (e.g. training sessions, end of the year award ceremony). Simplified codes or descriptions of the pieces of evidence were sorted in a table to be later classified. Importantly, the data collection process allowed the lead researcher to provide policy makers with real-time feedback on missing data or potentially interesting data to collect (e.g. members participation to events, popular training sessions), contributing to the improvement of certain features on the Biosphere Sustainable platform launched in spring 2022 (e.g. dashboard with macroviews).

Once the evidence had been collected, each piece was classified according to Delahais and Toulemonde's (2017) contribution analysis approach, which distinguishes four types of evidence: first, when the data comes from credible *authoritative* sources, it is considered a sound piece of evidence; second, when a specific trace was left by X causing Y, it is called a

signature piece of evidence; third, when converging data comes from two or more sources independent from one another (thus reinforcing each other), it is the case of a *convergent triangulated source*; fourth, one may find *chronologically consistent* pieces of evidence that add credibility to the causal narrative. Lastly, to assess the validity of the data we put each diagnostic piece of evidence through Van Evera's (1997) four types of process tracing tests (Figure 1) that take into consideration probabilistic necessity and sufficiency to affirm causal attribution and its strength.

Since in the social world it is difficult to obtain doubly decisive types of evidence, a combination of the first three types of tests is normally used to judge whether a hypothesised mechanism is sufficiently robust and therefore likely to have generated the outcome of interest (Mahoney, 2012). Hence, we do not claim to have conclusive proofs in the findings illustrated below, but rather explain how different pieces of evidence put together reinforce or weaken the probability of a causal narrative that includes two overarching hypotheses. The process of categorising and testing evidence was conducted and reviewed with the co-authors in order to overcome individual biases and validate the inferences made.

Findings

Below we present and classify the evidence collected throughout the study. This is deliberately detailed, to demonstrate how process tracing can be used in practice. We first provide an overview of how the intervention works, highlighting the main activities and most active entities. From this, we extract two overarching hypotheses of how the intervention facilitates sustainability learning – H1 related to the resources the intervention creates, and H2 related to the socialisation the intervention promotes. For each hypothesis we show how the pieces of evidence (e.g. P1.1, P1.2 in Tables 1 and 2) were classified based on the data source according to Delahais and Toulemonde's (2017) contribution analysis. For each hypothesis, we explain how the four process tracing tests of probabilistic necessity and sufficiency (Figure 2) were used to assess the strength of each piece of evidence. As expected, we did not find any evidence that passes a doubly decisive test, hence this test has not been included in the tables.

Mapping out empirical evidence that each part of mechanism is likely to produce (step 1)

We identified four key activities of how the intervention intends to keep owner-managers of the participating firms committed to sustainability learning (Figure 2), and two main hypotheses.

Two hypotheses on the benefits of the intervention were formulated:

- H1: The learning tools and resources provided to the owner-managers are useful to improve their enterprises' sustainable practices and therefore they

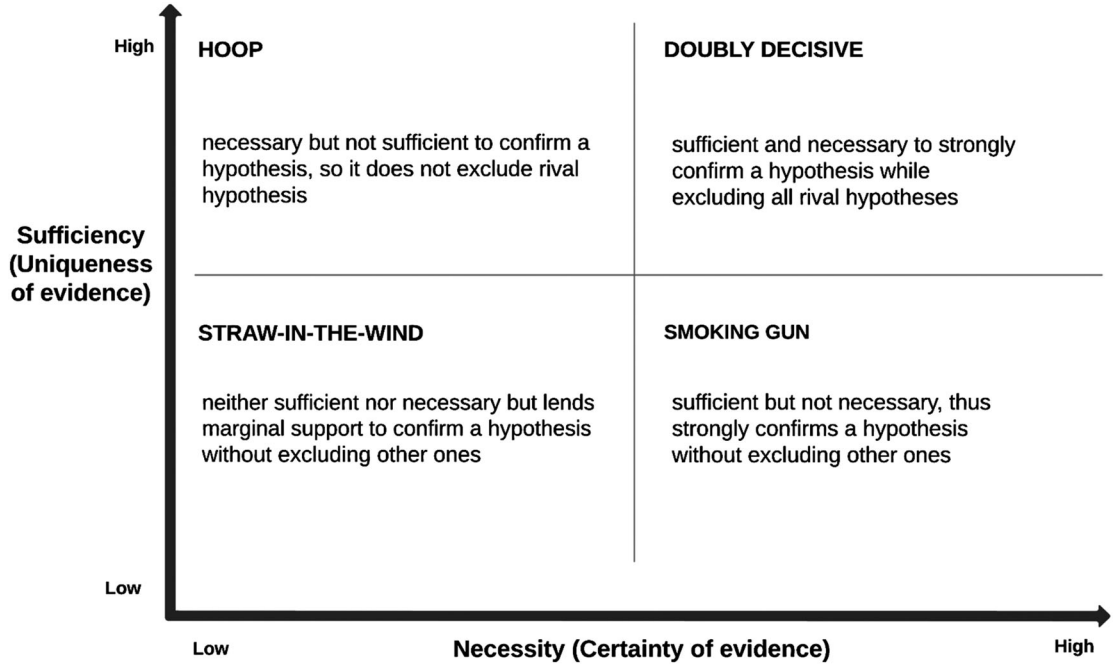

Figure 1. The four types of process tracing tests. (Adapted from Collier, 2011).

Table 1. Evidence classification and testing for H1.

H1: The learning tools and resources provided to owner-managers are useful to improve their enterprises' sustainable practices and therefore they stay committed to the intervention

	Straw-in-the- wind Low sufficiency Low necessity	Hoop Low sufficiency High necessity	Smoking gun High sufficiency Low necessity	Contribution analysis
P1.1 Government funding	passed			Signature
P1.2 Initial action plans	passed			Signature
P1.3 Record of training completed	passed			Consistent chronology
P1.4 Benchmark visits to show best practices		passed		Convergent triangulated source
P1.5 End of the year consultant reports			passed	Authoritative
P1.6 SMEs receiving certificate			passed	Signature
P1.7 Newsletters sharing examples of achievements		passed		Consistent chronology
P1.8 Quotes from policy makers and DMOs		passed		Convergent triangulated source
P1.9 Quotes from SMEs			passed	Convergent triangulated source
P1.10 Number of SMEs joining vs dropping out every year	passed			Consistent chronology

stay committed to the intervention. For simplicity, we call this 'resource-based learning'

- . The assumption is that owner-managers lack knowledge, guidance and clear action plans, which can be improved by making use of manuals, training and consultants' advice.
- H2: Engaging with like-minded peers facilitates knowledge sharing while keeping owner-managers motivated as they work together towards a common goal. For simplicity, we call this 'social-based learning'. The assumption is that being part of a community reinforces owner-managers' values of collective action and group belonging.

Evidence classification for H1: resource-based learning (step 2)

Table 1 shows ten relevant pieces of evidence that support how these owner-managers learn from the resources provided by the programme (H1), collected from multiple data sources, and classified according to the type of source.

P1.1 Government funding and P1.2 Initial action plans were classified as signature pieces of evidence because there are clear records of money invested and historical data on all the action plans created by the business owner-managers. Similarly, there are chronological records of enterprises joining or leaving the intervention (P1.10) and records of the training sessions that owner-managers attended (P1.3). Each year (except 2020 due to Covid19) there have been P1.4 Benchmark visits to some of the top performing enterprises, where they could show what they had been implementing. This piece of evidence comes from a convergent triangulated source, i.e. DMOs calendar records, comments from hosting individuals and feedback from participants to the events. We classified P1.5 End of the year consultant reports as an authoritative piece of evidence because they are contracted by the policy makers as external evaluators of these enterprises' performance.

In addition, enterprises that performed above certain standards would receive an official certificate (P1.6) by the Institute of Responsible Tourism at the end of the year, as proof of their sustainability efforts and success. Further evidence of owner-managers' sustainability learning was found in archives of P1.7 Newsletters sharing examples of achievements over the years. Relevant feedback can be found in multiple P1.8 Quotes by the policy makers and DMOs implementing the intervention across different counties. Most DMOs reported that they were satisfied with the attendance rate to a variety of training sessions ranging from recycling to digital transformation,

Table 2. Evidence classification and testing for H2.

H2: Engaging with like-minded peers facilitates knowledge sharing and keeps owner-managers motivated to stay committed as they work together towards a common goal and collective thinking

	Straw-in-the-wind Low sufficiency Low necessity	Hoop Low sufficiency High necessity	Smoking gun High sufficiency Low necessity	Evidence classification
P2.1 Examples of collaborations			passed	Convergent triangulated source
P2.2 Engagement in informal channels (e.g. WhatsApp groups)	passed			Signature
P2.3 Owner-managers copying peers' behaviour			passed	Convergent triangulated source
P2.4 Feedback forms from group training sessions	passed			Signature
P2.5 Participation in other initiatives led by policy makers (e.g. Info point)	passed			Convergent triangulated source
P2.6 Quotes from DMOs		passed		Convergent triangulated source
P2.7 Quotes from owner-managers			passed	Convergent triangulated source

	KEY PARTS OF THE CAUSAL MECHANISM				OUTCOME (Y)
	ACTIVITY 1 Create resources and methodology for owner-managers to learn sustainable practices	ACTIVITY 2 Promote and adapt the intervention to each county	ACTIVITY 3 Engage with training and members' network	ACTIVITY 4 Adopt sustainable behaviours, mindset and values	Owner-managers are motivated to stay committed to the intervention because they gain learning (H1) and a network of 650+ members (H2)
Intervention (X) is implemented →	ENTITY 1 Policy makers →	ENTITY 2 Destination management organisations →	ENTITY 3 Owner-managers of small enterprises →		

Figure 2. The mechanisms underpinning the intervention. (Adapted from Beach & Pedersen, 2019, p. 71)

planning for accessibility to questioning supply chains. Perhaps more importantly, supporting evidence of the effectiveness of the intervention was found across testimonials and informal conversations between peers (P1.9) participating in the activities.

Evidence testing for H1: resource-based learning (step 3)

The evidence we collected connecting the activities of the intervention to owner-managers' behaviour change is significant. The emergence of different engagement levels in sustainability learning is reflective of the complexity and heterogeneity of the committed owner-managers. For example, from the 100 action plans analysed by the research team (P1.2), enterprises set on average three to ten goals per year, but there was great variance in terms of how much time and effort each task may require. Even though they start at different levels of sustainability, most owner-managers stated that the intervention helps them to improve their practices (P1.9), which is why over 90% of them

renew every year (P1.10). Some owner-managers are more dynamic and self-motivated than others, and set an example for the local community. Others need more encouragement and time to shine and thrive. Their achievements were also quite different, with some focusing on tangible items and others improving their communication skills or applying a new sustainability mentality to other areas of life.

Nevertheless, it is difficult to evaluate the extent to which the intervention served to improve their enterprises' practices. Financial resources (P1.1) were necessary to create the framework of the intervention, but it does not suffice to account for H1. As for owner-managers' behaviour, it could be argued that setting action plans for their enterprises (P1.2) is a first step towards creating change, however they represent an intention more than the certainty of execution. Firms engage differently with the intervention based on their priorities, resources, and commitment levels. Similarly, attending training sessions (P1.3) contributes to the owner-managers' learning but it does not imply that participants absorb and make immediate use of all the information provided. Renewing the commitment year by year (P1.10) also suggests that owner-managers are gaining some benefits, but it may not be necessarily linked to the learning activities.

These four pieces of evidence (P1.1, P1.2, P1.3 and P1.10) increase confidence in H1 when paired with robust 'smoking gun' type of evidence, i.e. personal accounts of participating businesses, and the objective assessment of their performance by expert consultants (P1.5). This is further reinforced by the sustainability certificate recognised internationally (P1.6). If we had not found evidence of evaluative activities at the end of each year, it would have been hard to judge whether participants had gained any benefits. Further evidence that aligns with the effectiveness of the intervention in improving these enterprises' practices can be found pairing P1.4 benchmark visits, P1.7 Newsletters, and P1.8 discursive feedback from intervention implementers and stories (P1.9) of learning by doing. For example, as the owner-manager of a winery stated, working with the Sustainability Commitment helped them integrate with the surrounding environment, to the extent that the wine cellar does not need air conditioning nor humidity fans because they learned to take advantage of the natural climate within the caves.

P1.4, P1.7 and P1.8 were classified as 'hoop' type of evidence because they constitute significant proofs towards demonstrating that the intervention has generated change. Benchmark visits are an opportunity for the host enterprises to show and tell, sharing their case study with fellow members. However, these members may have been performing well even before joining the intervention, so their progress should be measured keeping in mind where they started from. At a county level, comments from the DMOs provide a wider overview of the progress of the intervention, which is important but not enough to account for H1; other mechanisms could have contributed to owner-managers' behaviour change. For example, an unintended consequence of the COVID-19 pandemic is that most businesses were forced to pause in 2020. For many, this meant they had space and time to rethink what they had been doing and focus on sustainability transitions. Having said that, P1.4, P1.8 and P1.9 all come from convergent triangulated sources and align with each other, building a strong case for H1. In conclusion, the evidence found indicates that resource-based learning played a significant role in enabling SMEs to effectively improve their sustainability knowledge and practices.

Evidence classification for H2: social-based learning (step 2)

Social-based learning is not an alternative to resource-based learning, but rather a complementary form of acquiring sustainability knowledge and implementing new practices. Following the same structure as above, this section illustrates evidence found in relation to H2. Table 2 shows seven relevant pieces of evidence that support how engaging with like-minded peers facilitates knowledge sharing while keeping owner-managers motivated as they work towards a common goal (H2), collected from multiple data sources and classified according to the type of source.

Numerous cases of collaborations (P2.1) were found between campsites and local guides, hotels and museums, restaurants and wine producers. It is essential for owner-managers to be well informed on the local activities and services available, because they are the first point of contact with visitors reaching a destination. Fieldwork allowed the main researcher to gain access to informal communication channels (P2.2) such as group chats where members seek advice and even send clients to each other. Further evidence of owner-managers working together emerged from accounts of good practices learned from some peers (P2.3), rather than from manuals or trainings. An interesting fact that emerged from attending coordination meetings and speaking to multiple DMOs was that numerous individuals committed to the intervention were also taking part in several other projects (P2.5) led by the government over the past five years, such as the European Charter for Sustainable Tourism and the Tourist

Information Point Project. It is reasonable to infer that one positive unintended consequence is the expansion of local networks to cross-county exchanges.

Since H2 is harder to prove than H1, the numerous discursive pieces of evidence (P2.6, P2.7) in support of the social engagement enabled by the intervention add confidence in H2, especially because they come from convergent triangulated sources. This was further reinforced by owner-managers' comments on the importance of spending time with peers because it has become rare to have opportunities to communicate in person since COVID-19. Through the intervention, members came to know their local reality better, connecting with suppliers and potential collaborators. Lastly, exchanging ideas and experiences with peers opens an individual's mind by 'stepping back from yourself for once to look and learn from others'. As an owner-manager summarised in an African proverb, ''if you want to go fast, walk alone. But if you want to go far, you need good company'. Nevertheless, it should be noted that there were also cases of businesses not engaging much with the members' network. These owner-managers with a strong sense of self-efficacy were confident about how they were working and implementing new sustainability practices, but did not see benefits in socialising with peers.

Evidence testing for H2: social-based learning (step 3)

One of the positive consequences of social exchanges was the emergence of numerous collaborations at local level between owner-managers (P2.1). Discursive feedback was useful to better unpack how synergies were created, and how these enterprises complemented each other. While comments from DMOs and consultants (P2.6) certainly support H2, the direct experience of these owner-managers (P2.7) involved in the activities carries more weight. Hence, P2.6 passed a hoop test whereas P2.7 and P2.1 passed a smoking gun test. Benefits of the intervention included peer connections and the shared vision of turning sustainability into normality. A positive unintended consequence was that several owner-managers not strictly related to tourism (e.g. a communication agency) joined the intervention and found synergy with other members through shared values and work philosophy. These owner-managers could see the positive impact that bringing business owner-managers together and promoting values of collective action could have on the whole destination.

Further supporting evidence was found in social media channels and group chats (P2.2). Due to the presence of participants external to the intervention, we cannot claim that these groups were a result of the intervention, so we classified P2.2 as straw in the wind. Feedback forms (P2.4) stating attendees appreciation for the networking opportunity were also a straw in the wind due to the scarce amount of documents found. Lastly, P2.5 is a straw in the wind piece of evidence because intervention members who participated in other initiatives led by the government (P2.5) may have been motivated by other incentives. Nonetheless, their involvement demonstrates a degree of trust in the policy makers as well as openness and willingness to engage with the network. Perhaps a more robust piece of evidence (passing the smoking gun test) comes from observing and hearing about enterprises implementing actions that they learned from a peer (P2.3). Again, this shows that there is trust among members, and that many top performing businesses care about sharing their success to benefit members who may be working on similar issues.

Discussion and conclusion

Policy makers need to understand how people learn if they are to design interventions that help improve enterprises' sustainability practices. Our case study offers examples of intervention design that might be useful to other interventions, while also highlighting a few important issues that can arise.

Resource-based learning is necessary but not sufficient for most SMEs

The Sustainability Commitment succeeded in providing a structured methodology for resource-based learning reinforced by social-based learning. Multiple pieces of evidence point to this, such as P1.9 Quotes commenting on the usefulness of a clear path to follow, trusted peers to share the journey with, and a variety of training topics (P1.3 Record of training). Owner-managers mentioned several motivations to adopt best practices, such as care for the environment, financial benefits and public image (Garay et al., 2017). However, they were able to take ownership of their learning and adapt it to their own reality, breaking down what seemed overwhelming into smaller, achievable targets as part of tailored action plans (P1.2). Normative influences (Kornilaki & Font, 2019) were also helpful in setting expectations of participants' performance. The combination of relevant training material, regular meetings and check-ins, end of the year audits (P1.5) and opportunities to interact with the community to exchange knowledge through benchmark visits (P1.4) and informal channels (P2.2)

played a significant part in the learning process that increased many participants' self-confidence.

This confirms Dias et al. (2020) findings that knowledge assimilation is positively linked to one's sense of self-efficacy, and Wenger's (1998) claim that people, tools, routines and interactions all contribute to the success of interventions that build on communities of practice. Our findings also confirm that not all SMEs acquire sustainability information in the same way (Garay et al., 2017). While SMEs that were proactive from the outset felt confident using structured resources and sometimes seeking information by themselves, less committed SMEs would need prompts from social interactions with peers. In addition, our study emphasises that the immediacy of learning is facilitated by the context designed. In the Sustainability Commitment, relevant knowledge and resources are placed within a system that gives owner-managers a sense of immediacy, little nudges and reminders by the community, peer expectations, clear touchpoints, deadlines and awards. Thus, we suggest that knowledge assimilation and behavioural change are more likely to happen when an intervention delivers structured resource-based training paired with community support and peer interactions. In other words, resource-based learning is necessary but not always sufficient. This is particularly true for those SMEs that lacked persistence. For this group of SMEs, commitment was enhanced by both social support and peer pressure.

Following from the above, social-based learning is needed to reinforce some aspects of sustainability learning as well as shared values and motivation to stay engaged. Evidence that owner-managers are very responsive to what people around them do was found in several pieces of discursive feedback (P2.7), the high participation in benchmark visits (P1.4) and several examples of copying trusted peers' behaviour (P2.3) to solve similar challenges or participating in other initiatives (P2.5). This demonstrates that social-based learning can promote critical thinking, knowledge exchange, assimilation and application. Participants highlighted the usefulness of practice-based activities, which the literature links to tacit knowledge acquisition (Hoarau, 2014). Our study confirms that this kind of knowledge is gained through socialisation with the local communities (Zhang et al., 2015), and that getting information from informal channels like WhatsApp groups (P2.2) or peer interactions within the trusted community are examples of informal processes often adopted (Sampaio et al., 2012). Moreover, in line with existing literature on how knowledge and collaborations are facilitated by informal relationships and proximity (Kornilaki et al., 2019), we found evidence of collaborations and appreciation of the complementarity, synergy and creativity gained (P2.1).

Social-based learning is a complex process, so policy makers should focus on understanding what the most beneficial conditions are, and seek to create them, rather than simply exposing their target audience to sustainability knowledge and expect them to change their practices (resource-based learning). When individuals learn by themselves, they can learn faster or slower perhaps, but they remain isolated islands of knowledge. With social-based learning we create rivers of knowledge and a system where they share and exchange sustainability practices (Ensor & Harvey, 2015). Our study shows that this approach promotes knowledge spillover and trust building (Dias et al., 2020; Zhang et al., 2015). Trust is pivotal in the communities of practice approach (Wenger et al., 2002) because it allows members to acknowledge their progress as well as their problems, so they can support others in their work while receiving support where needed, both through formal collaboration (Czernek, 2017; Garcia-Rosell et al., 2019) and informal interactions. We propose that social-based learning provides a context where members can trust their peers and therefore ask for help, learn and fail without judgement. This is what allows members to embrace training, mentoring and peer learning. They can thrive because of the learning culture created.

Overall, we found that the personality and values of these enterprises' owner-managers are one of the key influences on their organisational behaviour, as proposed by Sampaio et al. (2012). In particular, the owner-managers of enterprises that were already performing well prior to joining the Sustainability Commitment explained that they want to be part of this because the values promoted through the intervention resonate with their personal values and can benefit the wider community and environment. This aligns with the literature on lifestyle-oriented and value-based firms, where owner-managers make decisions driven by an ethical approach beside commercial objectives (Tomassini et al., 2021; Wang et al., 2019). In the context of the Sustainability Commitment, differences between commercially oriented and ethically driven owner-managers may not be immediately apparent. In the long term however, we may expect the first group to lose motivation if they do not see returns. Indeed, the enterprises that dropped out of the intervention primarily fell under one of three categories: they were highly commercially driven, they worked in isolation, or micro-enterprises with very limited financial and/or human resources. In summary, they did not see benefits in engaging with others or staying committed.

Implications for intervention design, monitoring and evaluation

Our findings suggest that an intervention should address beneficiaries based on certain characteristics, rather than treating them as a homogeneous group. In the example above, unpacking the motivations and values of owner-managers engaged in sustainability learning can help policy makers to speak the same language, and also better understand why certain individuals choose to leave the intervention. Although the Sustainability Commitment is promoting collective thinking and sustainability values, interviews with policy makers and DMOs (P1.8 and 2.6) revealed a lack of clarity around how they intend to measure sustainability learning and the success of the intervention. The main weakness here, as in many other interventions, is the lack of a well-designed monitoring strategy to measure if and what changes were brought about by the intervention. We therefore highlight the importance of designing more purposeful interventions with clear goals, and thinking realistically through what exactly will generate the change being promoted. Unfortunately, this is a significant challenge as claims of what an intervention will achieve are sometimes exaggerated. This is often because policy makers are often pitching for funding. Similarly, the risk of failure is often underplayed.

Another lesson emerging from our study is that conducting monitoring and evaluation when interventions are still ongoing is useful to adapt the current course of actions and create opportunities for internal learning. This can improve the learning experience for participants as well as data collection for policy makers. For example, making changes to the Sustainability Commitment monitoring platform will allow more nuanced queries and better longitudinal analysis of behavioural data. Another example is given by the DMOs in charge of adapting the intervention to each county, who are supposed to share and review their implementation activities during coordination meetings. However, these meetings used to be held only every three months and cover all the projects led by DIBA, which left little to no time for discussion. In 2022, it was decided to have monthly meetings dedicated to the Sustainability Commitment, which created room for mutual learning as well as collaboration opportunities between counties (e.g. counties sharing a national park, developing cycling tourism or working on accessibility). Thus, the principles of using the communities of practice approach to strengthen institutional cooperation (Pyrko et al., 2017) and fostering trust through cooperation (Czernek, 2017) that are advocated for the interventions' beneficiaries are equally important for the interventions' leaders.

Finally, while design and monitoring fall within policy makers' control to a certain extent (Ika et al., 2010), building a habit of critically assessing ongoing activities needs to become a shared responsibility. In other words, monitoring and evaluation should be done involving multiple stakeholder groups, so that their inputs and feedback are included. Our study adopted a participatory approach that sought to provide a polyvocal account of the intervention. Owner-managers were pleased to provide feedback, most of them appreciated being actively involved in the evaluation and some stated this made them feel heard. This is another example of how the communities of practice approach promotes community engagement and sharing (Cambridge et al., 2005). Encouraging monitoring and evaluation helps both policy makers and beneficiaries to question the status quo and bring about desired changes. Continuous learning is key, and it happens under observation. Lastly, partnerships between academia and industry are useful to bridge the gap between theory and practice. Researchers can help policy makers ask better questions and collect better data for monitoring and evaluation. At the same time, the real-life complexities of intervention implementation emerge through fieldwork. Working closely together, we can learn lessons in the present to be applied in future interventions.

In conclusion, our study highlights the value of using process tracing to unpack and evaluate learning in communities of practice. The methodology was useful to validate the knowledge on how communities operate and how networks learn. It allowed us to trace and compare the relative merits of two learning approaches in the same intervention, without the need for a control group, and enabled us to better understand how and why social learning is needed to complement and reinforce resource-based learning.

We propose that to advance the transition towards more sustainable behaviours, policy makers should aim to create intervention contexts that enable to form or strengthen existing communities of practice, because this approach facilitates social learning (Wenger, 2000). Interventions that provide opportunities for social-based learning can be more effective than top-down interventions because learning in social contexts happens organically.

Finally, evaluating the intervention while it was ongoing (rather than after its lifecycle) enabled us to improve the data collection and monitoring tools. In addition, involving multiple stakeholder groups added depth and value to the evaluation itself, but also gave

participants the opportunity to self-evaluate, contribute to the improvement of the intervention, and perhaps gain more clarity on their actions and objectives. With more time and resources, it would have been appropriate to contact all the participating enterprises to share and discuss the findings of this evaluation. Further research could investigate how communities of practice and normative influences can be integrated in the design of interventions that promote sustainability learning in small enterprises in other destinations and/or sectors.

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