Innovative and Promising Practices in Sustainable Tourism

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Introduction

The intent of this volume is to provide an opportunity for academics, extension professionals, industry stakeholders and community practitioners to reflect, discuss and share the innovative approaches that they have taken to develop sustainable tourism in a variety of different contexts. This volume includes nine cases from across North and Central America reaching from Hawaii in the west to New England in the east and from Quebec in the north to Costa Rica in the south. Case studies are a valuable way to synthesize and share lessons learned and they help to create new knowledge and enhanced applications in practice. There are two main audiences for this volume: 1) faculty and students in tourism related academic programs who will benefit from having access to current case studies that highlight how various stakeholders are approaching common issues, opportunities and trends in tourism, and 2) extension agents and practitioners who will gain important insights from the lessons learned in the current case study contexts. The National Extension Tourism (NET) Design Team and the World Leisure Centre of Excellence in Sustainability and Innovation are delighted to share the latest Innovative and Promising Practices in Sustainable Tourism.

In his state-of-the-art review, Butler (1999, p.8) defined sustainable tourism as “knowledge and research on sustainable development in the context of tourism” with most places needing development and seeing tourism as one way to achieve it even if the precise nature of the development is contested (George, Mair, & Reid, 2009). Economic development has been at the centre of much tourism development but, as shown by the cases in this volume, ‘triple-bottom-line’ approaches to economic, environmental and social development (Dwyer, 2005) are now embedded in sustainable tourism innovation. It is also worth noting that, in tourism, “innovation is a rather pragmatic term that can also include minor adaptations of existing products and services” (Hjalager, 2002, p. 465). So practitioners can draw inspiration from the cases presented here in order to make small but meaningful changes in practice. It is not only small changes which can be found as “we are also witnessing new approaches by both the private and public sectors in the creation of innovative businesses as well as tourism development models worldwide” (Ateljevic & Li, 2009, p. 10). This volume also includes transformational changes in sustainable tourism which are inspiring on a whole other level.

Sharpley and Telfer (2002, p. 2) argue “it is illogical to claim that tourism... is an effective vehicle of development without defining the desired outcome – that is, ‘development’”. Many of the cases in this volume show that sustainable tourism is really about using tourism as a tool for community economic development (Fullerton, 2013), i.e., the innovative processes required to improve local quality of life are often the same ones that will lead to successful local tourism development. Community Economic Development has gained popularity in recent years as it “places a stronger (though not complete) emphasis on the procurement of local investment and the identification, training and continued activity of local entrepreneurial talent, particularly in the interest of small business development” (Fullerton, 2010, p. 427). From this perspective, tourism development is aligned with endogenous economic development and is not necessarily growth oriented with community goals and priorities often coming to the fore instead (Carson et al., 2017). Throughout this volume it is clear that local stakeholders are motivated to engage in tourism beyond simply serving groups of visitors with wider engagement for a more holistic development central to the most Innovative and Promising Practices in Sustainable Tourism.

The volume begins a chapter by Arellano et al. on Indigenous Tourism and Reconciliation. This case from Quebec highlights the transformative potential of sustainable tourism when it is linked to a clear social
innovation goal. The method of Indigenous land-based pedagogies utilised serves as an excellent example of an innovative approach which could be adopted by many others. Similar grassroots initiatives “can educate non-Indigenous settlers and raise awareness about the politics of self-determination and current Indigenous land claim issues.”

Next we move to a case of ecotourism certification in Hawaii. Cox reminds us that the term ‘ecotourism’ “was coined in the late 1970s when “mass tourism” reached its peak and people began to realize that the mass tourism experience isolated them from the host culture and damaged the environment”. While ecotourism continues to have a favourable image today, Cox is careful in presenting a balanced perspective of “a niche market that incorporates an environmentally friendly and culturally protective approach” versus “a luxury available only to wealthy travelers who are trying to have a unique experience while not feeling guilty.” The case presented offers an innovative quality conformity system for sustainable tourism. Using the case of Hawaii, Cox follows the process of collaboration as industry, government and educational stakeholders came together to develop the system and the recognition which resulted over two decades of collaboration.

The case by Eades et al. highlights “the need for a holistic approach to sustainable tourism planning” by presenting a transdisciplinary case study of an educational institution working with a local authority on a new cultural tourism performance agenda. This case from West Virginia shows how a transdisciplinary approach is optimal for engaging community, researchers, and other stakeholders in collaboration. Central to the process is “the integration of community members who are given equal power and voice in the process” in order to ensure the full capacity for positive change is utilised.

From West Virginia, the case studies move to the west coast for a case on the growing presence of agritourism in Butte County, California by Hardesty et al. This case highlights a number of key challenges for rural communities engaged in tourism in terms of governance within a broader regional framework. For example, the Explore Butte County marketing program was able to highlight rural tourism providers but only those who were part of the existing, paid-membership local trails organisation, and permitting was a challenge for rural communities that did not have existing industry representation. The case identifies a number of areas where similar communities can take an existing, largely successful program such as Explore Butte County and make it even more inclusive going forward that creates new avenues for the long-term sustainability of rural tourism.

The case study by Kelsey et al. on mountain biking in Vermont highlights how recreation-based economic development has a role to play in communities previously dependent on resource extraction. The case shows how a long-term, innovative initiative - in this case pursuing mountain biking in a ski town in the 1990s - can have long-lasting benefits for small-towns such as Burke Mountain, VT. As is so often the case it was “a group of visionary leaders” drove forward with an innovative idea that, years later, is having a significant economic impact. “Kingdom Trail Association demonstrates that outdoor recreation opportunities have the potential to transform a downtown, an economy, and a community” and the lessons learned are an inspiration for other communities.

Moving to Kentucky, Koo presents a case of another successful trail program. Trails can connect tourists to a number of small towns they may otherwise not consider visiting. The combination of resources for nature-based tourism and a desire to improve community health outcomes makes for an innovative example of community-based tourism. Koo notes that some communities who offer trail programs can generate significant opportunities for economic and community development as they combine latent tourism demand with latent local demand for nature-based resources thus making investment in trail resources more sustainable.
Predyk and Vaugeois take a closer look at the Économusée ® non-profit, artisan-based model of economic development. With a network of over 70 artisans across Canada and Europe, the model has proven to be a great success in linking cultural tourism to local entrepreneurship. The study highlights the potential of models such as this to help those in the growing artisan economy who are not usually experienced in entrepreneurship. The model is shown to add to the bottom-line of participants and the case implies that this is not necessarily due to the Économusée ® brand as awareness is relatively low among visitors. Instead, the model seems to aid artisans on the entrepreneurship process side to create exceptional visitor experiences.

The next case study moves from entrepreneurship to labour studies as Nowaczek looks at staff training at an eco-lodge in Costa Rica. This is a novel case as tourism labour remains under-researched despite tourism being a labour-intensive sector and despite the fact that it is in service delivery where there is major scope for tourism innovation. As Nowaczek shows, such training “started generating impact almost immediately within the team” and even deeper connections between hosts and guests occurred over time. It was the cultural sensitivity training which opened the staff’s eyes to the visitors’ hopes and dreams for their ecotourism experience and visitors had the chance to get to know the local community better and engage in local conservation efforts which is another form of ‘reverse osmosis’ as a result of staff training.

The final case study in this issue volume brings us back to New England to examine collaborative stakeholder engagement along the New Hampshire sea coast routes. This case shows a proven concept of mixed-use transportation corridors in an amenity-rich region can still face challenges when resources become constrained. In addition, there are particular challenges to stakeholder management in a corridor context - particularly when the largest towns are on either end of the corridor and there are several distinct jurisdictions along the route. The case recommends a ‘Byway Council’ as one way to proactively address multi-jurisdictional issues.

The nine case studies presented in this volume each have their own context and challenges yet, taken together, several broad themes are clear and present. First, the relationship of innovation and time - some innovations can see immediate results (as in the case of staff training in Costa Rica and the benefits of following the Économusée ® model) while other innovations start slowly and develop over years or even decades (as in the case of mountain biking in Vermont and the New Hampshire sea coast route). The challenge for stakeholder collaboration is getting both small wins in the short-term and maintaining those efforts over the long-term. Second, the geography of tourism innovation is very clear in this volume - four of the cases deal directly with lineal tourism routes or ‘tourist trails’ where the challenges of collaboration across jurisdictions calls for governance innovations which are readily transferable to other places hoping to develop new tourist routes going forward. Third, the role of people in driving innovation - from the more prosaic studies of entrepreneurship and labour on to the role of local champions and visionaries pushing new ideas to the forefront the way through to the special role tourism can play in reconciliation with Indigenous Peoples, it is the people who make the places prosper and it is the people who overcome the governance challenges and resource constraints. While tourism is often seen as lacking innovation, it is clear from the tenacity of tourism stakeholders presented here, and elsewhere, that there continues to be no shortage of **Innovative and Promising Practices in Sustainable Tourism.**
References


Indigenous Tourism and Reconciliation: The Case of Kitcisakik Cultural Immersions

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Chapter Summary

This case study explores an initiative originating in the Anicinape community of Kitcisakik, Québec. The community hosts non-Indigenous students for an experiential and immersive outdoor engagement with Anicinape ways. Innovative ways of learning about an Indigenous culture and related sociopolitical issues are considered acts of building reconciliation, via the lens of an Anicinape land-based pedagogy.

For nearly a decade, the semi-nomadic community of Kitcisakik (population c.3801), located within the boundaries of La Vérendrye Wildlife Reserve in the Abitibi-Témiscamingue region of Québec, has hosted non-Indigenous high school and university students enabling them to experience living ‘off the land’, whilst concurrently sharing Anicinape culture and tradition. The initiative started with a community desire to share, celebrate, and transmit Anicinape culture, while re-appropriating wider territories of their ancestral land, on which they unofficially reside. It evolved into a grassroots social economy initiative, offering short- and medium-term land-based expeditions for students, who share in a diverse range of activities, such as hearing testimonials from Residential School survivors; participating in talking circles about territorial politics; observing winter forest trapping; sharing knowledge about traditional medicines; the preparation and eating of traditional foods; joining indigenous art and crafts workshops; sharing in sweat lodge ceremonies; or, playing hockey.

This prescient initiative began informally around 2010 and gradually evolved into a positive way to revitalize local culture, and improve the intergenerational transmission of traditional knowledge within the community. Importantly, it also generated dialogue with non-Indigenous youth, who learn about Kitcisakik’s Indigenous

culture whilst experiencing living ‘off the land’, leading to Indigenous resurgence\(^2\). In addition, such cross-cultural encounters have reduced community isolation, and encouraged a form of collective mobilization. While the initiative is internally acknowledged to strengthen individual and collective skills, it has potential to generate employment and revenue, contributing to a wider economic and social undertaking that respects Anicinape values.

Kitcisakik’s experiential education initiative foreshadowed Canada’s Truth and Reconciliation Committee’s Call to Action to include Indigenous knowledge and teaching methods in Canadian curricula to aid a process of reconciliation. This case study demonstrates how visiting the community and experiencing Kitcisakik through Indigenous land-based pedagogies is an opportunity for building intercultural understanding and citizen awareness of Indigenous histories and cultures, while learning specific principles of the Anicinape way and the current issues the community faces in a modern Canada. This is an exceptional example of the reconciliation process in action.

**Learning Objectives:**

1. Explore how a disadvantaged population with extremely limited resources has developed an experiential educative tourism initiative that engenders reconciliation at the same time as revitalizing local culture, leading to Indigenous resurgence;
2. Relate the politics of reconciliation to the way education tourism can support land claims and self-determination;
3. Consider some of the cultural and epistemological barriers to develop an efficient and well managed tourism initiative;
4. Explore settler education opportunities existing within such experiential grass-root and land-based initiatives; and
5. Understand an Indigenous perspective of sustainability.

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\(^2\) Simpson (2011) defines Indigenous resurgence this way: “reinvesting in our own ways of being; regenerating our intellectual and political traditions; articulating and living our legal traditions; language learning; creating and using our artistic and performance-based traditions. All of this requires us to reclaim the very best practices of our traditional cultures, knowledge systems in the dynamic, fluid, compassionate, respectful context in which they were originally generated” (pp.7, 18).
The Issue, Opportunity or Trend

For some 40 years, nation states that endured or provoked violence, oppression and/or internal ethnic conflicts, have searched for mechanisms to foster reconciliation by acknowledging past oppression and barbarity, and seeking to create conditions facilitating the harmonious coexistence of all involved parties (Coulthard, 2014; Gaertner, 2014). In Canada, this age of apology in an apparent era of reconciliation (Gaertner, 2014) led to the Truth and Reconciliation Commission (2008-2015). The TRC’s outcomes appear to have prompted a new phase in the relationship between non-Indigenous settlers and Indigenous peoples. The Final Report (2015) recommends creating mutually respectful dialogue aimed at guiding public policies to “mitigate intercultural conflict, build citizen confidence, and build social and economic capacities” (TRC, 2015, p.142). This case study explores an initiative from the Indigenous community of Kitcisakik, Quebec, which receives non-Indigenous students for an educative immersion in Anicinape ways. Innovative, experiential ways of learning about Indigenous cultures and sociopolitical issues help build reconciliation via an Indigenous land-based pedagogical lens.

Grass-root Indigenous tourism initiatives can instil an Indigenous resurgence considered key for Indigenous healing and reconciliation (Simpson, 2011). Such initiatives can educate non-Indigenous settlers and raise awareness about the politics of self-determination and current Indigenous land claim issues. Although research has not yet linked these issues to the decolonization movement, many argue that Indigenous tourism, undertaken responsibly, is at the root of meaningful local development (e.g., Colton 2005; Colton & Whitney-Squire 2010; Lynch, Duinker, Sheehan, & Chute, 2010; Whitney-Squire, 2016; and Cassel & Maureira, 2017). An accepted definition of Indigenous tourism states it is: “tourism activity in which Indigenous people are directly involved either through control and/or having their culture serve as the essence of the attraction” (Hinch & Butler, 1996, p.9; see also Ewert & Shultis, 1997; Colton & Whitney-Squire, 2010). Based on Bell’s (1999) Aboriginal Community Development Framework, Colton & Whitney (2010) evaluated some 20 indigenous tourism case studies from around the world that are based on a “paradigm that seeks to restore the relationships broken in aboriginal communities by generations of oppression” (p.264). In general, these studies established Indigenous tourism initiatives have the potential to strengthen community empowerment, economic development, wellness, learning, and stewardship (Colton & Whitney-Squire, 2010).

In Canada, various projects have highlighted Indigenous tourism has the potential to protect, preserve and revitalize traditional culture and knowledge by strengthening community ties (e.g., Lynch & al., 2010 Colton 2005, Colton & Whitney-Squire 2010, Cassel & Maureira 2015). For example, in Mi’kmaq communities, involving Elders (traditional knowledge holders) with youth in a tourism initiative initiated dialogues, and re-established and strengthened intergenerational communication (Lynch et al. al 2010). In addition, by offering a wide range of outdoor activities, the Mi’kmaq initiative is an opportunity to give new life to land-based practices and reconnect communities with their ancestral territory (Cassel & Maureira, 2015).

In this climate, such initiatives serve political claims since they allow communities to occupy their ancestral land and reassert their sovereignty (Menzies & Butler, 2007). Similarly, basing community activities in a respectful and harmonious relationship with the land generates the possibility of creating alternative economic models, promoting economic independence, and enabling a level of self-determination (Menzies & Butler, 2007). This was expressed by members of the Woodland Cree First Nation in Canada's North, where their tourism initiative was grounded in the desire to escape relationships of state dependency by strengthening
community control of traditional resources to achieve equitable development encompassing a range of economic, social, cultural, political, and environmental factors (Colton, 2005). However, for these initiatives to materialize, it is essential that Indigenous communities place themselves at the center of such projects and maintain control over them (Zeppell, 1998).

Cultural homogenisation and globalisation encourage increasing numbers of travelers to seek tourism experiences of cultural difference and exoticism (Bruner, 1995). The purpose of travel is variable; the involvement of tourists, in terms of their willingness to learn and involvement in the experience, is changing. Interactions between hosts and tourists can lead to questions about the cultural identity and authenticity of initiatives (Clifford, 1997). Travelers' expectations and prejudices are sometimes predetermined and lead to ignorance about the hybrid and dynamic identity, and way of life of Indigenous communities (Shoebridge, 2013). In this regard, to preserve and share indigenous values and culture, and not be absorbed in the mere commodification of their culture, host communities need to develop a fine understanding of the dilemmas associated with tourists' expectations.

Western tourism tends to confuse Indigenous tourism with ecotourism (White, et al., 2013). The latter refers to activities conducted in a sustainable and environmentally friendly manner (White et al., 2013). Nevertheless, Western conceptions of ecotourism often imply an imperialist vision of the environment. Any relationship that is symbolic, cultural, or spiritual is often discarded in favor of its simple commercialization (Poirier, 2007). Consequently, it is imperative Indigenous communities be wary of the influence of external forces, otherwise the aspirations of holistic community development could be undermined (White et al., 2013). As a growing sector, ecotourism attracts more and more tourists; the expectations and pressures they cause could ‘contaminate’ the authenticity of Indigenous tourism, and even increase the process of cultural dispossession (Shoebridge 2013, Butler & Menzies 2007).

However, the previously mentioned Mi’kmaw study determined cultural tourism to have the ability to “dispel cultural stereotypes and correct inaccurate and archaic images that tourists possess about aboriginal culture” (Lynch & al., 2010, p.68). Experiential activities making use of the senses, such as outdoor activities or storytelling, encourage cultural learning by tourists (Spark, 2002). Hosts are also often aware of their product’s educational potential. Another Mi’kmaq initiative demonstrated the willingness of hosts to educate visitors about historical and contemporary realities of political and legal issues, and the effects of colonialism on their community (Colton & Harris, 2007).

Finally, exposure to Indigenous realities allows educational visitors to experience firsthand the harsh contrast with their own lived reality, and question how such a situation occurred, and continues today in one of the richest western countries. Such questioning, it is believed, will lead students toward an understanding of their role in the process of reconciliation.
The Innovation

Case Context

For nearly a decade, the semi-nomadic community of Kitcisakik, located within the boundaries of La Vérendrye Wildlife Reserve in the Abitibi-Témiscamingue region of Canada’s Québec province, has received non-Indigenous high school, college, and university students to experience living ‘off the land’, thereby sharing Anicinape culture and tradition. Since the early 20th century, a gradual invasion of Anicinape territories by settlers via the industrial intensification of forestry and mining activities, creation of hydroelectric power generation projects and a formal road system in the Wildlife Reserve, and related leisure-based activity meant that by the early 1980s, formerly nomadic families were scattered in a few settlements throughout their territory (Leroux, Chamberland, Brazeau, & Dubé, 2004). Such developments ultimately led to the semi-sedentarization of Indigenous families (Teasdale, 2006: 109. Today, members of Anicinape community live alternately between a historic gathering site on the shores of Great Lake Victoria and a settlement made of small houses near the Dozois reservoir (Saint-Arnaud & Papatie, 2012). Resisting the idea of being displaced within the reserve system governed by Canada’s 1876 Indian Act, the community is forced to illegally ‘occupy’ their ancestral lands, an area that is ‘owned’ by the Crown (Girard, 2008). By rejecting to live on reserve, the community exists in conditions of extreme precarity, where homes lack running water and electricity, and government support is scarce (Girard 2008, Leroux et al. 2004). When combined with the suffering endured within the Residential School system by many in the community, such ongoing pressures have led to drastic changes in people’s lifestyles threatening traditional and cultural practices rooted in their relationship to the land (Leroux et al., 2004; Uprety, Asselin, & Bergeron, 2013). Additionally, assimilation policies, in concert with environmental pressures, threaten Anicinape heritage, particularly among the youngest community members (Saint-Arnaud & Papatie, 2012, Uprety et al., 2013).

This prescient initiative began informally around 2010, some 5 years before the Truth and Reconciliation Commission’s final report, and is now seen as a positive way to revitalize local culture, improve intergenerational transmission of traditional knowledge within the community, and generate dialogue with non-Indigenous youth. Internally, the sharing of stories and teachings by Elders encourages youth and other community members to revive their interest in, and learn about, traditional ways that would otherwise be lost. Externally, non-Indigenous students learn about Anicinape and Indigenous cultures, their economic and political realities, and experience living off the land. Such cross-cultural encounters help to reduce community isolation, and ultimately encourage a form of collective mobilization, which can be associated with Indigenous resurgence. It also encourages students to critically consider the plight of an Indigenous community some 400kms from Ottawa, Canada’s national capital.
The community receives about 10 groups of school, college, or university students throughout each year. Groups comprise between 15 and 40 individuals. Their experience lasts 4 to 10 days. Group activities are scheduled in accordance with local members’ availabilities, seasonal-appropriate activities, and visitors’ special interests. Specific content can include discussing community land-claim issues, participating in projects fulfilling specific community needs such as gardening, distributing water and firewood to families, or visiting and helping the poorest families. A non-intensive itinerary leaves time for spontaneity so students can spend time getting to know community members and discuss shared interests. Additionally, all visitors participate in traditional activities such as the gathering, cooking, and serving of traditional food; preparing teepees for accommodation; and, collecting fir branches (sapinage) for use in sleeping arrangements. Other general activities include observing winter forest trapping of small animals for food and pelts; fishing; sharing knowledge about traditional medicines; preparing and eating traditional foods; participating in indigenous art and crafts workshops; sweat lodge ceremonies; community gardening; and playing hockey with community members.

Stakeholders Involved

The Kitcisakik Anicinape community comprises some 380 people of the Algonquin First Nations. It is located within La Vérendrye Wildlife Reserve in Québec’s Abitibi-Témiscamingue region. Kitcisakik is the primary stakeholder: it conceived the initiative, invites visitors to spend time in the community, and share their lives, culture, and experiences in an educational setting. Whilst the initiative was originally informal and managed by volunteers, over the last 4-5 years, it has become more formally integrated into the wider community. Currently it involves a considerable proportion of the population, and has been formally sponsored by the
community’s Chief and Band Council. It is now managed by Kitcisakik’s relatively newly-formed Intergenerational Tourism Committee (ITC), which is led by a recreation activator, employed by the Council, one of whose roles is to organize all visits, welcome students, and oversee their time in the community. The recreation advisor also hires some key community members who act as helpers, guides, and cooks for the visitors.

Whilst the initiative is independent, informal and grassroots, several attempts have been made to partially integrate it within regional tourism networks led by organizations such as Québec Aboriginal Tourism (http://www.quebecaboriginal.com) and Abitibi-Témiscamingue Tourism (https://www.abitibi-temiscamingue-tourism.org) which develop and promote more market-based tourism products. Although the initiative is occasionally promoted by these organizations, no formal relation exists. Another such organization, the Société des établissements de plein air du Québec (Sépaq), whose mandate is to “manage and develop public territories and the tourism facilities entrusted to it”, is responsible for provincial tourism facilities, wildlife and natural reserves. Their relationship with Kitcisakik can invoke tensions, primarily located within land rights claims. The community never formally participated in negotiations with the Crown, preferring instead to occupy the land they see as theirs. As previously noted ‘ownership’ of the land where the Anicinape settlement and its ancestral territory are situated is under dispute. However, the experiential tourism initiative is tolerated so long as it doesn’t compete with these other organization’s programs of activity, as it broadly conforms to Sépaq’s mission and mandate.

Kitcisakik’s visitors are drawn from a number of mostly francophone schools, colleges, and universities based primarily in Québec province. Despite the Call to Action of the TRC’s final report, the experiential visits do not form part of any official curriculum. Often, visits are organized by students themselves, as an extra-curricular activity: they want to learn the history of Canada’s Indigenous peoples, and understand their current situation. They are usually assisted by a teacher or professor. Each group consists of between 15 and 40 individuals, depending on the organizer’s abilities to recruit students to raise the funds necessary for their visit (approx. $100CAD per day inclusive of travel, accommodation, food, and activities). Prior to their visit, students can undertake a variety of informal activities to ensure they have some kind of basic understanding of the situation they will encounter: nothing is uniform and depends on individual cohorts and their teachers. During their visit, as described elsewhere, they engage in a wide-range of community-based activities, sharing their experiences with community members. Post-visit, and their encounter with Anicinape culture, the majority of students hold debriefing sessions to discuss their experience and try to assimilate all of the information they have accumulate. Over the past 8 years many schools, colleges, and universities repeat their visit; professors involved in previous trips, seeing the educational impact and value of the experience, organize subsequent trips for new student cohorts.

Approach Used and the Impact

To participate in the process of reconciliation, the innovative Kitcisakik initiative relies heavily on core notions of experiential learning, knowledge transfer and mobilization, and Indigenous resurgence, whilst challenging the historical and social conventions underpinning settler colonialism. At the centre of the innovation is the desire by members of a small, semi-nomadic Indigenous community to develop a means of intracommunity intergenerational knowledge transfer, from Elders to youth, thereby subsequently encouraging Indigenous resurgence. Informally, by enabling non-Indigenous youth to experience Anicinape culture, the initiative
notably foreshadows the Truth and Reconciliation Commission’s 2015 call for Indigenous “historical and contemporary contributions” to be recognized in Canadian curricula (p.7); the experience nudges students to question the contrast between two Canadian paradigms: Western and Indigenous.

Students visiting the community under the initiative learn through first-hand experience something of the lives of residents: their everyday milieu, historical antecedents, traditional customs and practices, current anxieties over land and identity, relationship to the land and respectful harvesting of local flora and fauna, quiet nobility in the face of vicious oppression, and renewed hope of equitable recognition in their homeland. This is something that cannot be easily taught in a classroom setting, from a textbook, or by a non-Indigenous teacher. They understand being immersed in the quotidian mundanity of ordinary lives, living off the land, viscerally witnessing the deprivation of taken-for-granted amenities and denial of basic services.

Prior to the student’s arrival, the community activator arranges basic accommodation, sleeping quarters, food, and water. They also collaboratively co-create an itinerary of activities with the students to address key issues and topics students want to discuss and experience. As previously stated, these activities are based across the community; some are indoor, many are outside on the land. Often students will listen to Elders and others talking firsthand about the trauma and suffering caused by the Residential School system, and their paths to healing. Exposure to these direct testimonies has a very powerful effect on most students and awakens them to the institutionalized racism, cultural genocide, and abuse directed toward Indigenous peoples less than a generation ago. Elders also share their views on the National Inquiry into Missing and Murdered Indigenous Women and Girls (http://www.mmiwg.ffada.ca). Other talking circles locate the community’s perspective on land issues and territorial politics, allowing students to understand a wholly different perspective to social life; for example, the Forest Committee organizes a talk about current land claims, land rights, and political tensions. Other indoor activities are culturally-based, delivered via traditional handicraft workshops, which not only teach how things are made, but also explain their significance in relation to a respectful and sustainable land-based existence. As artifacts are being made, stories are being told, so the whole workshop becomes an immersive experience. Bridging indoors and outdoors, students become intimately involved in the preparation, cooking, and eating of traditional food. The preparations include ongoing dialogue about the meanings inherent in practice, acknowledging the respect Indigenous peoples have for the land, crops, and animals they need to survive. Similarly, local knowledge bearers will engage in discussions about traditional medicines, allowing students to gain insight into an aspect of Indigenous spirituality. Continuing this theme, students may also participate in sweat lodges, a traditional ritual steam bath which is sometimes associated with spiritual purification, and is connected to Anicinape worldviews. Moving outside to the land, students help gather crops, witnessing the community’s central relationship to the land. During summer, visitors will be able to fish and observe traditional hunting practices; in winter, they will be able to see how forest traps are made, set, and retrieved. Individually, each activity relates an aspect of community life for the inhabitants. Cumulatively, they powerfully immerse students in the lived reality of an Indigenous community.

The schedule allows considerable time and space for visitors to develop relationships with those welcoming them to the community. Quite often, it is through these more informal times that the most powerful communication and understanding can take place. Through such experiences, students gain valuable insight into conditions surrounding everyday life in Kitcisakik. Such insight, gained by experiencing the lived reality of an Indigenous community engenders a critical appraisal of the situation which can open up pathways to reconciliation.
Experiential learning achieves: (i) a deeper understanding of content; (ii) developing the capacity for critical thinking and the application of knowledge in complex or ambiguous situations; and the ability to foster lifelong learning in the workplace (Eyler, 2009). It also privileges a higher degree of knowledge transfer (e.g., Lovelace, 2013) between community members and visitors. Such knowledge transfer continues when the students return to their institutions: they talk to friends and families about their experience, spreading what they have learned. In turn, such knowledge transfer leads to knowledge mobilization - students embed their learning into their lives, which research indicates, can completely and positively modify their attitude toward Canada’s Indigenous peoples. At the same time, they start to actively question many of the things they have taken for granted all their lives, such as access to clean water and sanitation, access to electricity, education and health care. They question how, in 21st century Canada, such inequality can exist.

There are many impacts from the Kitcisakik initiative, some felt within the community, and others experienced by student visitors.

Positive community impacts can best be summarized in the words of members [author’s translation from French]. For clarity they have been separated into two distinct groupings: reconciliation and resurgence.

**Reconciliation:**

I think the initiative is a good thing ... [the impacts won’t be felt] ... right now but in 5 or 10 years, non-Indigenous and indigenous peoples will get along better. If we continue with the visits, they enable this contact. (Member #1).

So, the young people that came are now much more aware, that is like some reconciliation between individuals. (Member #2).

The fact that the ... [students]... come to visit [Kitcisakik], it helps a lot. They see how we live, how we have respect for the world, then the fact that the world come to see us, they will tell their friends that we are nice, we are welcoming with the outside world. Then I hope it will make things [reconciliation] happen. (Member #3).

It could help [experiential education], it could help, why we struggle to live on our territory, you know, there are many things that non-native people criticize us for, while it is they who should reconcile with Indigenous peoples. (Member #4).

**Resurgence:**

Visitors want to learn, and at the same time, our people that lived outside of the community, it allows them to learn as well ... [about] ... our own roots and culture. Really, I have learnt a lot [about my cultural practices] during the student visits, I didn’t know how to plant fir trees (sapinage) and I realized I was learning at the same time as the students. But the traps and the fishing, I was already able to do that. It’s been a long time since I know how to fish and trap. I was already taught when I was younger. (Member #1).

Me, I think that without the initiative, no youth would get involved in cultural activities, they would not find the motivation to do so. (Member #3).
What Elders know ... they know a lot of things ... during visits, they teach the students, and they teach us at the same time. (Member #5).

I'm still young, so I'm still learning from Elders. When I see Elders during the visits, people older than me get involved, so I'll be there, and then I'll just watch them, how they do it. That's how I learn. (Member #6).

Student impacts, and their reflections, are also perhaps best expressed in their own words [author’s translation from French], collected as data in an ongoing research project between the community and the authors:

**Experiential education:**

Really if I summed up the five years of history that I had at school, even if everything was taken into consideration, I do not think I learned a quarter of what I saw [during my time in the community] ... I experienced Kitcisakik for 10 days, that's all. And the number of things I learned, it's pretty huge in proportion to what I knew. (Student #1).

The rhythm that is different, but that is super interesting because it also gives the opportunity to take time with others, it's cool too. And it was also cool to be in the woods with them, to see how it's all happening, to take the time there to talk, to produce cultural material, to see its importance and all. It's another perspective. By having Indigenous teachers, it also helps to understand this feeling of community; we have more of an inner perspective ... [in school] we have books, documents, but it has nothing to do with human contact. This is ... more factual, relevant, interesting, and I think it's essential to have that perspective to better understand [the Indigenous perspective]. (Student #2).

**Land-based education (Anicinape ways):**

In the woods, it's really different as an environment and atmosphere, and I really adored it, that's where we learned a lot in a short time [...] and there, we had to give tobacco [a sacred plant], you must spread tobacco for the spirits, for everything one takes from nature, it is necessary to give back. (Student #3).

All the knowledge of herbs, plants, natural resources in general, the link with nature is strong. When we went to do fir branches ... I said to myself intuitively, 'it's not necessarily correct to remove branches randomly', but at the end, they give back to nature ... when they fish with a net they give back to nature, there are fish they do not take. There is a link that is even stronger because they live off nature, off natural resources. So, they give back more, there is more of a consideration in this regard ... One of the things that struck me most was spirituality, we were talking and the subject came to spirituality. Theirs is an inclusive spirituality, so interesting with the use of natural resources in practices. It really captivated me ... it is done with respect to nature, and in respect of all peoples. (Student #4).

All the parts of the animal are important, they all have utility, we realize that finally, it is the Anicinape philosophy. By speaking with people, you understand how they live this [life]... and what their relationship with each other is, with nature, but also about their relationship with the past too. I think I learned a lot also about their process of healing, the ceremonies [involved]... (Student #2).
Land claim politics, dispossession and settler colonialism

This visit made me finally begin to understand what settler colonialism and land dispossession mean, how Indigenous peoples are displaced into reserves; but here they are still resisting and claiming their territory and ways of life. (Student #5).

We knew that there were a lot of land claims. But their territory ... the whole Sépaq park is their territory. So, it was really challenging to see that evolution ... for example, Kitcisakik and Lac Simon, before it was the same thing. I really didn’t know that basically it was the same community. But with the advent of the reserve [system], it split the community in two, and it made big internal divisions, and it’s really sad the way it happened. The people from Lac Simon are those who have accepted to live on reserve, while in Kitcisakik it’s like the resistance. They did not want to leave their territory, they did not want to be governed, or rather controlled by the government. I find it’s a good thing from their side, it’s really good that they fight for their rights and their cultural heritage. (Student #3).

Over the years, as the initiative developed and academic interest increased, the program began to be co-created. For example, teachers accompanying student groups requested the inclusion of specific topics in the sharing circle part of the itinerary.

The overall feedback from students indicates quite clearly their appreciation for the opportunity to share the lived experience of Kitcisakik’s population, albeit for a short period of time. Time and again, students were asked: “Would you have learnt so much in class?”; the resounding answer was always: “No!”.

Implications & Lessons learned

This case study highlights clearly the internal and external benefits of an Indigenous education and tourism initiative in line with Canada’s Truth and Reconciliation Commission’s Calls for Action. As mentioned, both community and members benefit significantly from the initiative: the benefits are primarily introspective, prompting an Indigenous resurgence via intracommunity knowledge transfer and mobilization from Elders to youth. Indigenous culture and practices are enabled to flourish where quite recently they were in sharp decline. The community benefits materially too: the initiative provides a certain level of employment and generates direct income for the community (if partnered with external organizations, a significant element of the revenues would be retained outside the community). The initiative also acts to build capacity amongst those involved; particularly youth whose work hosting the visitors and organizing and delivering content provides them with opportunities to learn new skills that advance them individually. The experience also allows community members to enjoy a slightly less isolated relation to the world outside.

Students clearly benefit from the experience. In an intense period, they are introduced to several important concepts which educational curricula currently ignore. These include confronting the underlying sociopolitical and jurisdictional tensions between Canada’s Indigenous peoples and settlers regarding the wider use of a contested/claimed ancestral territory that centers land at the heart of reconciliation processes. Students also learn for the first time about living in harmony with nature and living off the land in sharp contrast to the exploitative capitalistic system in which they grew up. Exposure to Anicinape culture and ecological practices via advanced holistic and experiential land-based pedagogies rooted in Indigenous culture enables post-visit students to more critically engage with Canadian society. They are also able to relay their experience to peers.
which mobilizes their learning and further disseminates the cultural ideas they were exposed to. This furthers the cause of reconciliation.

Educators can view the Kitcisakik initiative as a model for engaging with other Indigenous communities to build experiential learning and Indigenous pedagogies into curricula, in line with the TRC’s Calls for Action. By replicating the initiative, more non-Indigenous Canadian youth would be confronted with their unacknowledged privilege and immersed into a parallel culture that they are largely unaware of. It would also allow for a regeneration of Indigenous culture within communities as knowledge passes from Elders to youth. Education tourism practitioners need to respect Indigenous ways of being that do not replicate profit-based corporate goals. They also need to recognize the educational value of Indigenous knowledge holders, despite their not having recognized tourism credentials. Such people have extensive knowledge regarding living off the land, indigenous culture, traditions, and philosophy.

Overall, Kitcisakik has created an initiative which has opened up a range of innovative pathways to both reconciliation and resurgence.

Discussion Questions

1. Specifically, how does experiential learning enable students to understand the plight of Canada’s Indigenous peoples in ways they couldn’t in the classroom?
2. Why doesn’t the Kitcisakik initiative not formally integrate with existing regional tourism networks?
3. How can such as intercultural encounters advance reconciliation?
4. How can knowledge mobilization via experiential educational tourism advance Indigenous land claims and self-determination?
5. Why have Canada’s educators been so slow in responding to the TRA’s calls to incorporate Indigenous histories and contemporary situation into the curriculum?

References


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Hawaii Ecotourism Association’s Sustainable Tour Certification Program: Promoting Best Practices to Conserve a Unique Place

Linda J. Cox, University of Hawaii at Manoa (UHM), United States of America

Chapter Summary

The United Nation World Tourism Organization (2017) concluded that a well-designed and managed tourism sector could support the host’s sustainability goals. Quality systems similar to Fodor’s star rating system for hotels provide a number of potential benefits as a means of tracking tourism’s sustainability performance (Kozak and Nield, 2004), assuming that they promulgate meaningful best practices. In 2016, Hawaii hosted 8.855 million visitors that spent $15 billion and visitor arrivals are expected to increase to more than 9 million visitors in 2018 (Department of Business, Economic Development and Tourism, 2018). On an average day, the State has 6.50 visitors for every resident and this ratio is expected to increase with more visitor arrivals (Department of Business, Economic Development and Tourism, 2018). In order to educate businesses, residents and visitors about protecting the State’s natural and cultural resources, the Hawaii Ecotourism Association (HEA), a 501c3, piloted an Ecotourism Certification Program in 2011 and 14 tour operators were certified statewide. Today, HEA’s Sustainable Tourism Certification Program includes 52 tour operators across the State and HEA working to further a partnership with the Global Sustainable Tourism Council for operator certification. Hawaii is one of two states in the U.S. with a certification program aimed at tour operators and HEA’s recommendations for best practices are on par with leading international programs. This case study summarizes the knowledge contributed by the Cooperative Extension Service that supported this effort, describes the lengthy, on-going process of developing HEA’s Certification program with the assistance of Cooperative Extension and provides lessons learned for other regions interested in a more sustainable tourism sector.

Learning Objectives:

This case study addresses the following learning objectives:

1. Understanding the distinction between sustainable tourism and ecotourism;
2. Identifying the benefits of a quality system as a means of tracking tourism’s sustainability performance;
3. Outlining the elements that comprise a quality conformity system for tourism sustainability;
4. Determining how to operationalize a quality conformity system for tourism sustainability in order to realize its potential benefits; and
5. Articulating some of the challenges that must be overcome to develop a successful quality conformity system for tourism sustainability.
The United Nation World Tourism Organization (UNWTO, 2017) concluded that, as one of the fastest growing global economic sectors, tourism can “help preserve natural and cultural assets, ... empower host communities, generate trade opportunities and foster peace” (p.4). However, in order to realize these goals, the tourism sector must be well designed and managed (UNWTO, 2017). The benefits and costs of tourism that impact popular visitor destinations fall into seven major categories according to Kreag (2001), including:

- Economic
- Environmental
- Social and cultural
- Crowding and congestion
- Services
- Taxes
- Community attitude.

Addressing the challenges in providing visitors and residents with opportunities to experience positive net benefit from tourism are key to sustaining any host region.

Widespread confusion regarding the concepts of sustainable tourism and ecotourism often results in the use of these terms interchangeably. The UNWTO (2013) defines sustainable tourism as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities” (p.10). The UNWTO (2013) concluded that sustainable tourism guidelines and management practices are applicable to all forms of tourism in all types of destinations. Hunter and Green (1995) developed a list of criteria for sustainable tourism, including:

- Following ethical principles that respect the culture and environment of the area, the economy and traditional way of life, and the political patterns.
- Involving the local population, proceeding only with their approval, and providing for a degree of local control.
- Keeping intra-generational equity in mind, including fair distribution of benefits and costs.
- Planning and managing tourism with regard for the protection of natural environment for future generations.
- Planning in a manner integrated with other economic sectors.
- Continuously assessing to evaluate impacts and initiating action to counter any negative effects.

“Ecotourism” was coined in the late 1970s when “mass tourism” reached its peak and people began to realize that the mass tourism experience isolated them from the host culture and damaged the environment. Some people view ecotourism as a niche market that incorporates an environmentally friendly and culturally protective approach. Others consider it a luxury available only to wealthy travelers who are trying to have a unique experience while not feeling guilty about doing so, or a term used by companies trying to take advantage of a niche market. Honey and Stewart (2002) identified eight elements of authentic ecotourism. These include:

- traveling to natural areas
- minimizing impacts
• building environmental and cultural awareness for hosts and guests
• providing direct financial benefits for conservation
• providing financial benefits and empowerment for local communities
• respecting of local culture
• being sensitive to the host country’s political environment and social climate
• supporting of human rights and international labor agreements.

Ecotourism is defined more narrowly than sustainable tourism.

Carrying capacity identifies the cultural, social, and ecological limits to tourism growth, though estimating it, particularly cultural or social carrying capacity, is challenging as is reducing use or limiting growth. For example, Vieth and Cox (2001) found that the 1977 Hanauma Bay Beach Park Site Development Plan estimated the recommended optimal use level or “capacity” for Hanauma Bay at 1,363 people per day. However, the actual use of Hanauma Bay increased from about capacity in 1975 to about five times the recommended capacity in 1999. Currently, an educational program is used at Hanauma Bay to increase the carrying capacity to accommodate the average daily visitor count of 3,000–3,500 and the ecosystem still shows signs of damage.

The difficulties associated with estimating carrying capacity as the basis for an absolute use limit have decreased interest in this approach in recent years. Identifying a maximum use ratio rather than an absolute number has become more widely used, although the methods for relating the ratio to all elements of sustainability are not clearly defined. Maximum use ratios or bio-capacity as compared to ecological footprints to identify the ecological deficit resulting from a product are commonly used to examine the sustainability of various products, including food and fiber, seafood, energy, timber and paper, and settlement as described in https://www.footprintnetwork.org/our-work/ecological-footprint/. Determining maximum use ratios for services or non-consumptive resources uses, such as ecotourism or community-based tourism is more challenging.

Economic theory suggests that any effort to restrict supply by imposing maximum use ratios or quality control systems in order to achieve sustainability will result in a price increase. The higher price caused by restrictions will mean that businesses will target environmentally conscious customers with a higher willingness to pay which is also likely to mean these customers have higher than average incomes. This will also result in these visitors frequenting more “local” recreational areas. Potential conflicts may arise as rural and/or small communities without sufficient infrastructure attempt to accommodate more visitors or as visitors with high expectations and larger than average incomes interface with residents who cannot locate employment opportunities that offset the high cost of living in a visitor destination. Some visitors, who are not as able to afford a high quality, more sustainable opportunity may also be looking for similar experiences and trying to avoid the additional costs that result from the community’s effort to be sustainable. “Backpackers” is a term often used to describe visitors searching for high quality environmental and cultural experiences with a limited ability or willingness to pay the full cost of such experiences.

Kozak and Nield (2004) concluded that quality and eco-labeling systems have a number of potential benefits as a means of tracking tourism’s sustainability performance. The tourism sector is familiar with reliable, measurable indicators of satisfaction, such a Fodor’s star rating system for hotels, which are aimed at ensuring that service providers conform to various practices. These types of measures include (1) quality indicators that reflect how consumers feel about the services, which are readily available from a variety of sources; (2) health, hygiene, and safety indicators that are often regulated by the government;
and (3) sustainability indicators that have been developed in tourism destinations internationally. Sustainability is a very complex goal, compared to satisfaction that involves a simple system that changes very little over time, such as Fodor’s. Therefore, sustainability requires that a complex best management practices be developed and improved over time as more information and technology becomes available. Without such a system, visitors will never know whether a firm is truly utilizing sustainable tourism practices or if it is “greenwashing,” i.e., presenting itself as sustainable when it does not comply with generally accepted standards (Bien 2004). Australia and Costa Rica have programs that are considered to be models of effective certification programs that contribute to furthering the goals of socially responsible tourism (Medina 2005).

According to Toth (2002), the basic elements of any quality conformity systems include:

- Standards
- Assessment
- Certification
- Accreditation
- Recognition
- Acceptance

As Table 1 indicates, three types of standards are found in sustainability evaluation systems used around the world (Honey and Stewart, 2002). These include prescriptive standards that outline how efforts will be accomplished, performance standards that outline what will be achieved, and management system standards that specify the elements of sustainable management processes.

Performance-based standards that set benchmarks for minimally acceptable levels are becoming more common and are considered to be more effective (Rivera 2004).

Table 1. Types of Standards for Sustainability Evaluation Systems*.

<table>
<thead>
<tr>
<th>Type</th>
<th>Example</th>
<th>Advantage</th>
<th>Disadvantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescriptive</td>
<td>Use of Energy Star &amp; water saving appliances/fixtures</td>
<td>Best practices clearly identified</td>
<td>No test of best practices, restrict innovation/alternative solutions</td>
</tr>
<tr>
<td>Performance</td>
<td>Solid waste reduction by 50 percent</td>
<td>Allows alternative solutions</td>
<td>More ambiguity &amp; imprecision, with burden of proof on the applicant</td>
</tr>
<tr>
<td>Management System</td>
<td>Monitor utility usage &amp; waste steam</td>
<td></td>
<td>No requirement to improve performance</td>
</tr>
</tbody>
</table>

*Adapted from Honey and Stewart (2002)
Assessment and certification systems vary depending on who is responsible for completing the assessment and who is responsible for ensuring that a product, service provider or management system conforms to a standard. The three types of assessment/certification systems are:

- First-party assessment/certification for which the suppliers assess themselves and declare themselves in conformance,
- Second-party assessment/certification for which the customers or purchasers assess the suppliers and/or their products and assure that they are in conformance, and
- Third-party assessment/certification that may be mandatory or voluntary for which an independent organization not related to the supplier or the purchaser completes the assessment/certification.

Accreditation is the process used to certify the certifiers, which is crucial to third-party systems that rely heavily on accreditation to provide credibility. The goal of accreditation is to enhance certification’s credibility with clients and the public. Therefore, everyone involved needs to understand the scope of the accreditation program (Toth, 2002).

Recognition and acceptance requires that producers and customers understand the benefits of certification. A complementary educational and promotional effort is needed to alert all stakeholders about issues of concern to ensure that the system evolves over time to produce the desired benefits. Once acceptance occurs, the marketplace is expected to provide an incentive to certified suppliers resulting in the tourism sector’s willingness and ability to fund the program. The overall benefits of an effective certification includes the following benefits:

- Increasing firm satisfaction due to protecting the environment and being a responsible community member
- Ensuring the future sustainability of their business
- Achieving greater customer satisfaction
- Increasing profitability
- Improving their public image
- Opening a dialogue with various groups of community stakeholders
- Providing evidence a firm’s commitment, credibility and character to lenders and insurers
- Developing a more capable and dedicated workforce
- Building social capital by as firms voluntarily searching for solutions to furthering sustainability
- Facilitating technology transfer by the continual identification and promulgation of best technology (Toth, 2002).

The Innovation
Case Context

Tourism has been Hawaii’s largest economic sector since the early 1960s (Hawaii Department of Business Economic Development and Tourism, 2006). As the overall growth slowed in the 1990’s policymakers looked to niche markets, including ecotourism. The Hawaii Ecotourism Association (HEA) was formed after a statewide Conference on Ecotourism in October 1994 and HEA was granted 501c3 status in 1995 (see Fig. 1). HEA obtained a grant from Hawaii Tourism Authority (HTA) to develop a certification program aimed at tour operators to help ensure that visitors could participate in more ecofriendly
activities. The effort did not produce a program because HEA members could not agree on the program’s process or content.

Figure 1. HEA

The events of September 11, 2001 negatively impacted Hawaii’s tourism sector and shifted focus back to maintenance of existing markets. HEA members struggled and in 2007 HEA’s membership decreased by 50 percent. However, in 2005, HTA and the Hawaii Department of Business Economic Development and Tourism (DBEDT) officially defined sustainable tourism and HTA defined ecotourism in an effort to again focus interest on these niche markets (DBEDT, 2006). While the definitions provided some clarification, a system to measure progress is still lacking (Mak, 2008).

Hawaii residents, especially Native Hawaiians, have expressed concerns about the spill-over effect from tourism including, increases in crime and housing costs; altered communities and social structure; degradation in cultural authenticity and values; a seriously comprised sense of place; and degradation of infrastructure and the natural environment (DBEDT 2006).

HEA has maintained a working relationship with HTA since 2001 and continued to further the use of a sustainability evaluation system for tourism with various partners. As a partnership started in 2009 between the state’s Department of Health and DBEDT; the Hawaii Board of Water Supply; and the Chamber of Commerce of Hawaii, the Hawaii Green Business Program recognizes businesses that were committed to going green by implementing energy and resource efficiency practices (http://greenbusiness.hawaii.gov/, accessed August 2, 2018), Some aspects of HEA’s work on a sustainability evaluation system for tour operators were incorporated into the standards for the Hawaii Green Business program.

In 2009, HEA revised its mission changing it to “protect Hawaii’s unique natural environment and host culture through the promotion of responsible travel and educational programs relating to sustainable tourism for residents, businesses and visitors” (https://www.hawaiiecotourism.org/, Accessed on October 5, 2018). The need to protect the host culture meant that ecotourism in Hawaii differs from the definition offered by Honey and Stewart (2002) indicating that ecotourism respects all local culture. In Hawaii, the host culture is of key importance and therefore, the State needed to develop a unique certification program.
HTA funded HEA’s pilot Ecotourism Certification program in 2009 and 14 tour operators were certified statewide. In 2013, HEA was awarded another HTA grant to update and expanded the pilot program into the Sustainable Tourism Certification Program (see Fig 2) that included many aspects of the West Hawaii Voluntary Standards (WHVS) developed by the CORAL Reef Alliance and detailed at https://coral.org/west_hawaii_standards/.

In 2016, Hawaii hosted 8.855 million visitors that spent $15 billion and visitor arrivals are expected to increase to nearly 9 million visitors by 2018 (DBEDT, 2018). The State’s tourism sector is remains the largest contributor to the State’s gross domestic product, representing 21 percent of its entire economy in 2012. On the average day, the State overall has 6.50 visitors for every resident and this number is expected to increase in the future and visitor arrivals increase (DBEDT, 2018). Due to the increasing concerns from residents about the continued growth of visitor arrivals, HTA provided HEA with an annual contract in order to expand the Sustainable Tourism Certification Program, upgrade the website; and develop more educational material/content, particularly cultural related topics related to HEA’s new Travel Pono tagline (see Fig. 3). Pono is a Hawaiian word meaning righteously.
Stakeholders Involved

HTA is the State of Hawaii’s lead agency responsible for creating a vision and developing a long-range plan for tourism for the State of Hawaii, as described at www.dbedt.hawaii.gov/overview/about/; www.hawaiitourismauthority.org/what-we-do/. HTA generally markets Hawaii’s brand and is attached to the Hawaii Department of Business Economic Development & Tourism as one of the department’s six attached agencies. HTA’s primary programs include major festivals and events; sport marketing; Hawaiian culture; event development; community enrichments; natural resource protection; career development and safety/security. A thirteen-member board of directors oversees HTA’s Tourism Special Fund and administers tourism development from a statewide perspective.

The Hawaii Visitors and Convention Bureau (HVCB) works closely with the Hawaii Tourism Authority as a nonprofit organization whose sole purpose is to promote our islands to travelers throughout North America as described at https://www.hvcb.org/. HVCB manages HTA’s website, GoHawaii and relies on a membership fee to provide significant funding.

The Cooperative Extension Service in the College of Tropical Agriculture (CTAHR) at the University of Hawaii at Manoa works to assist communities across the State. As the importance of the agricultural sector declined in the 1960s and tourism became that State’s primary economic engine, CTAHR’s Community Economic Development Program began to examine how to best optimize the long-term performance of the tourism sector.

Closer partnerships with the five Surfrider Foundation Chapters in Hawaii are underway. Of particular interest is “Ocean Friendly Restaurants, which is a Surfrider Foundation program that recognizes restaurants that reduce plastic waste and implement ocean friendly practices” (http://www.oceanfriendlyrestaurantshawaii.org/, Accessed August 24, 2018) Restaurants certified by Surfrider to be ocean friendly will be featured in the Pono Travel Planner and an educational webinar about the Ocean Friendly Program is under development.

The relationship with the Hawaii Green Business Program is also being strengthened. All accommodations that have been certified as Green Businesses will be included in the Pono Travel Planner. An educational webinar is also under development.

In 2009, the CORAL Reef Alliance completed a project working with marine recreation industry stakeholders in West Hawaii to develop the WHVS. These regional standards are now improving and ensuring better environmental performance in SCUBA diving and snorkeling; general boating, including surfing and kayaking; wildlife interactions, including marine mammals, invertebrates, manta rays, and sharks, and shoreline activities. Over thirty marine tourism providers on Hawai‘i Island have signed on to adopt the standards and have agreed to assist CORAL in evaluating them for their overall effectiveness, attainability, and affordability. CORAL is now working to expand these efforts to other areas of Hawai‘i as described at https://coral.org/west_hawaii_standards/. As part of the partnership with CORAL, HEA has incorporated these standards into the Certification Checklist and many CTOs that have adopted the West Hawaii Voluntary Standards are also CTOs.

Efforts are also underway to partner with the Global Sustainable Tourism Council’s (GSTC) international certification program for tour operators by become a GSTC accredited certification body and having HEA’s standard be recognized by GSTC, as described at www.gstcouncil.org. “The Global Sustainable Tourism Council (GSTC) establishes and manages global sustainable standards, known as the GSTC Criteria, for public policy-makers and destination managers, and for hotels and tour operators.” GSTC is legally registered in the USA as a 501(c)3 non-profit organization with a diverse and global
membership, including UN agencies, NGO’s, national and provincial governments, leading travel companies, hotels, tour operators, individuals and communities – all striving to achieve best practices in sustainable tourism.

**Approach Used and the Impact**

In 2006, HEA partially funded a graduate student to complete a survey of HEA members to explore their interest in a certification program. She concluded that members supported a certification program as long as it was simple and inexpensive (Bauckham, 2005). An HEA committee developed a short review process for ecotour operators in order to explore tour operators’ response to adhering to various sustainability practices. A small number of operators were reviewed, though overall the program had little visibility or participation across the State.

The pilot Ecotour Certification Program was based on HEA’s 2006 review process and certification programs around the world. Stakeholder feedback of HEA’s current review process was included and adaptations were made to address contemporary issues of concern for Hawaii’s unique natural resources and culture. HEA was also involved in efforts by the Coral Reef Alliance to encourage the use of sustainable practices in marine tourism in 2006 in order to learn more about best management practices. The Coral Reef Alliance developed the West Hawaii Voluntary Standards and promulgates these standards by entering into a Memorandum of Understanding (MOU) with marine tourism businesses. A business that signs the MOU agrees to “allow, support, and facilitate the assessment of these standards through methods: 1) passenger/client exit surveys; 2) self-assessment; 3) peer review; and 4) anonymous third-party community participation and feedback.”

In 2004, around 100 programs worldwide certified tourism sustainability, with 78 percent of these based in Europe and 68 percent focusing on accommodations. The Australian and Costa Rican programs were considered in 2005 to be models of effective certification programs that contribute to furthering the goals of socially responsible tourism. Since 2005, the Green Globe, Sustainable Travel International, The Partnership for Global Sustainable Tourism, among others, have worked to develop more comprehensive programs that are accepted worldwide. The following sources of information were used to develop HEA’s pilot Ecotour Certification Program.

1. **Green Globe 21 International Ecotourism Standard** (Green Globe, Asia Pacific)
2. **Nature and Ecotourism Accreditation Program** (Eco Australia)
3. **Sustainable Travel and Ecotourism Program** (Sustainable Travel International)
4. **A Simple User’s Guide to Certification for Sustainable and Ecotourism** (TIES, Rain Forrest Alliance, CREST)
5. **Global Sustainable Tourism Criteria** (The Partnership for Global Sustainable Tourism Criteria)
6. **West Hawaii Voluntary Standards** (Coral Reef Alliance)

HEA’s first Certification Committee was composed of two University of Hawaii at Manoa faculty members, one of which is a specialist with the Cooperative Extension Service, and HEA’s Board Associate/Special Advisor. The pilot Ecotour Certification had two parts. The first part addresses whether or not the operator meets the minimum requirements for certification. To meet the minimum requirements, the ecotour operator must:

- Be in compliance with all Federal, State, and Local regulations
- Have a written sustainability plan that guides operations, and addresses the operating principles in the HEA Certification Program.
- Provide a direct, personal experience of nature for consumers.
Contribute to conservation outcomes annually.
Contribute to the communities in which they operate.

The second part of the certification evaluates how the operator addresses the operating principles that include:

- Environmental Management
- Staff Management
- Interpretation Management
- Consumer Evaluation Management
- Marketing Management

Certification was initiated by the completion of a two-part application. The first part describes how the operator meets the minimum requirements and requires supporting documentation. The second part is a self-assessment checklist. A qualified third-party auditor visits the operation to verify all the information on the application. The scoring supported Gold, Silver, Bronze and Certified levels.

The Certification Checklist has been revised twice, 2013 and 2018. It is now called the Sustainable Tourism Certification Program and it compliments the Green Business Program, which focuses on accommodations and the Ocean Friendly Program that focuses on eating establishments. The minimum requirements were folded into the operating principles and the evaluation criteria have become more rigorous and objective. The certification levels have been replaced by an overall numeric score and the website will summarize what each CTO does well and areas for improvement. Seven specialized best practices sections have been developed for the following tour types:

1. Hiking Tours
2. Manta Ray Dive/Snorkel tours
3. Motorized Snorkel Tours
4. Not motorized snorkel tours
5. Van tours
6. Zip line Tours
7. Surf/Stand Up Paddling Lessons

Draft Versions are under review for the following tour types:

1. Bike
2. Helicopter
3. Whale Watching, motorized and not motorized
4. SCUBA Diving, shore- and boat-based
5. Agricultural

Zoning restrictions present a challenge for agricultural tours because they vary by county and not particularly clear about what is required for agricultural tours to be considered legal. At the same time, agricultural tour operators in Hawaii are not as equipped to engage in activity marketing and tour interpretation as other types of tour operators, since they tend to be rooted in agricultural production. The Cooperative Extension Service played a valuable part in linking agricultural tourism with the Sustainable Tourism Certification Program.
To become certified, the operator completes the Certification Checklist, working with the Certification Manager to address any questions. The Checklist is long and intimidating for operators. Then a trained auditor who also takes a tour confirms that all the responses are accurate. If the auditor passes the operation, the best practices and the areas needing improvement are summarized and the operator is added to the list of CTOs. The auditor spends between eight to 12 hours to complete a certification report at an estimated cost of $700 to $900. HEA currently has 4 trained auditors and is working toward two trained auditors on each island with the auditors being paid only $200 for completing an audit. This cost may increase in the future in order to attract auditors. The entire certification process can be completed in a month or two, though it usually takes longer due to the time needed for the operator to complete the Checklist. Previously the certification fee was $200 for a two-year certification, plus a $125 annual membership fee, which did not cover the cost of certification. The fee structure was changed to a sliding scale based on number of full time employees in 2018 with an annual cost between $250 and $1000 including membership with recertification every year after the initial certification.

The recertification process, which involves the operator updating their original certification checklist, having a one hour virtual meeting with the certification manager and funding a Pono Traveler as a “secret shopper” who generates a written report. This recertification process reduces certification costs overall. Any person with an individual HEA membership can become a Pono Traveler by completing a short training, taking a tour with the CTO and completing a short report. This also allows residents to take tours at no cost, which they are not likely to experience otherwise, and learn first hand the high quality experience offered by CTOs. At the same time, CTOs benefit from valuable feedback provided Pono Travelers and HEA benefits from increased membership.

The partnership now being pursued with the GSTC, which will allow HEA’s CTOs to also obtain GSTC certification more cost effectively and be considered for shore excursions from cruise lines that require GSTC certification. A comparison of HEA’s Certification Checklist with the GSTC standards is now underway, which is also assisting HEA in establishing an accreditation process. HEA could provide audits for GSTC certification in order to avoid GSTC auditors traveling from Europe, which will also give HEA a role across the Pacific as other island destinations become interested in local and/or international certification. The UNWTO (2014) has concluded that many small island developing states have significant natural and cultural resources that attract visitors, while at the same time facing major challenges in managing tourism in order to ensure that it is sustainable. Effective certification programs require significant funding due to the resources required for educating businesses residents and visitors, in addition to the cost of the continuing commitment to ensure that the program produces the desired outcomes. Island locations often do not have a large number of private tour operators, which makes the economies of scale association with an international affiliation attractive.

Another key component of the Sustainable Tourism Certification Program is a system for people to put forth their concerns about the behavior of CTOs. HEA has developed a complaint form and process for following up complaints that are received. This helps ensure that resident have a portal for inputting their concerns, which helps build program acceptance.

**Implications & Lessons learned**

HEA has no staff, a volunteer Board of Directors, volunteers and a few contractors. The grant and contract funding received since 2005 totals less than $200,000. Leveraging the in-kind support of UHM’s Cooperative Extension Service assisted with obtaining grants and contracts, developing educational content and programs, and providing access to partnerships and volunteers. The majority of the certification programs developed across the globe have received significant amount of funding and/or
in-kind contributions from country level governments and/or large international non-profit organizations. Alaska is the only other U.S. state to develop a certification program, which assists in supporting community-based economic development opportunities associated with tourism in remote villages. Certification programs often accompany efforts to provide larger-scale training to host locations, particularly those in underdeveloped countries interested in community-based economic development.

HEA is currently focused on building its four core programs, including the Sustainable Tourism Certification program, the Educational Program, the Outreach Program and the Development Program in an effort to more fully address its mission. The Certification Program was the primary focus for many years and recently more attention is being given to the other three programs.

The Sustainable Tourism Certification Program almost tripled in size with 52 CTOs across Maui, Hawaii Island, Oahu and Kauai as of 2018. A new progressive fee structure linked with number of employees is expected to ensure that the program is self-sustaining. One of the largest CTOs, Kualoa Ranch, reported hosting 1,000 to 1,500 visitors a day in 2018 and is planning on expanding to be able to host 2,000 visitors a day. More than 90 percent of the ranch’s revenues are generated by tours. (Gomes, 2017)

Certification now occurs from March to May and August to October, which are the shoulder seasons in Hawaii. New operators submit checklists in order to be queued for an audit during the upcoming certification period and auditors are being trained on each island to reduce air travel for certification. Developing a group of independent auditors has continued to be a challenge.

The Educational Program continues to develop training materials with seven short educational videos uploaded to YouTube. CTOs have identified their training needs. Efforts to form closer ties with various partners, particularly cultural experts and the National Interpretation Association, in order to provide more rigorous educational opportunities for CTOs are underway. Tour guide training is a best practice in the Certification Checklist. However, developing or accessing credible, affordable training can be challenging for operators, particularly for placed-based topics. A partnership with UHM’s Forestry Extension program is now providing more, much needed terrestrial based training. The first event in the series addresses the best practices needed in order to stop the spread of Ohia Rapid Death, which is now decimating Hawaii’s native Ohia tree population. This is an example of placed-based training relevant only to operators in Hawaii. At the same time, guides continue to ask for additional training that supports increased compensation to ensure guiding offers a career path for residents.

HEA’s Outreach Program reached two million people in 2017 and 2018 as a result of the updated website developed in 2017 and a social media effort involving Facebook, Instagram, Twitter and MailChimp. HEA also collaborated with HVCB on the new GoHawaii website by developing specific content on sustainable tourism. Materials have been developed and a volunteer training program is under construction to enable volunteers to staff booths at community events, while articles and interviews also appeared in local media. A CTO has been featured in a national magazine and HEA received national exposure in an effort to promote the ban of sunscreens that are not reef safe. National and international outreach is often challenging for small non-profit organizations in isolated island locations.

Social media is presenting challenges that must be addressed in the Outreach Program. Visitors feel more comfortable with self-guided tours because so much information is available from various social media sources. Unfortunately, the behaviors that result from visitors relying on this source of information that may further degrade cultural and natural resources. For example, trails described in various posts may be difficult to locate and erosion may result as people search for trailheads. Or the locations of sacred, cultural places may become widely known as people post their locations. Every place
is very likely to have unique opportunities and challenges that visitors cannot grasp if all of their information comes from social media.

While self-guiding may be less costly for visitors, greater costs may be born by the host as a result. Young visitors, commonly known as backpackers, interested in natural and cultural experiences while traveling as economically as possible are often a concern for hosts. They may engage in activities, such as sleeping on beaches or organizing large groups for self-guided activities, which are not in keeping with the host’s sustainable practices.

HEA’s Development Program is further cultivating sponsorships/memberships with green hotels and “Ocean Friendly” restaurants to be featured in the Pono Travel Planner on the HEA website. Since building, restaurants and tours require different types of certification requirements, Hawaii now has three cooperating programs that cover the entire spectrum. The development and implementation of effective certification program is extremely costly, which makes cooperation imperative. Funding from HTA will provide the resources for this upgrade. The Pono Traveler Program is now attracting new members from Hawaii and the U.S. mainland. Efforts are also underway to develop a partnership with the Hawaii Hotel and Lodging Association and their annual Visitor Industry Charity Walk that occurs every year. An HEA Ambassador Program is planned for the near future to provide a Development Program presence for HEA on each of the four major islands and manage volunteers that engage in local community outreach activities.

HEA is just now being recognized across the State of Hawaii as a force in support of sustainable tourism, after almost 20 years. Working with the smaller tour operators, providing educational programs aimed at tour operators, reaching out to residents and visitors and linking best practices to documentable resource protection remains a challenge. Starting a certification program that suits the needs of one geographical area is costly and time consuming for the certifying organization. The other option is to link with an existing program, which is costly for businesses being certified and may result in a program that does not fit the needs of the geographic place. The overall challenge of certification programs is related to activities that revolve around linking the program to the on-going health of the cultural and natural resources. Water and energy use in an accommodation are easy monitor, while the relationship between tours and the health of culture or natural resources is much more difficult.
Discussion Questions

1. Local cultures, customs, sacred places and environments may dictate that various protocols and best practices be used by tour operators and visitors, though in other places the same protocols and best practices may not be relevant. These unique place-based protocols and best practices help provide the authentic experience that visitors are seeking. What place-based adjustments would be needed to define ecotourism and sustainable tourism to develop a sustainability evaluation system for the tourism sector in your location and how might these be identified?

2. How could all the relevant stakeholders be engaged in developing and promulgating a sustainability evaluation system for the tourism sector in your location?

3. How might a sustainability evaluation system be linked to socio-ecological wellbeing in your location?

4. What challenges would have to be overcome in order to develop a sustainability evaluation system in your location?

5. What stakeholders would need to be involved in developing such a program in your location?

References


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Transdisciplinary University Engagement for Sustainable Tourism Planning

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Chapter Summary

Sustainable tourism literature reveals an increasing understanding of the complexity of tourism development and the need for a holistic approach to sustainable tourism planning. This includes mixed-methods approaches that draw from multiple perspectives, and participatory planning processes that strengthen partnerships between community members, visitors, and tourism development stakeholders. This study describes transdisciplinary planning and design activities developed and implemented by the West Virginia University Rural Tourism Design Team (RTDT) to support the development of a cultural tourism performance agenda for the Tucker County, WV Cultural District Authority (CDA). We demonstrate how a transdisciplinary approach successfully engages the community and scaffolds outputs to create synergies between researchers and research outputs. Local ownership and stewardship of actionable items is enhanced through this scaffolded process leading to implementation.

Learning Objectives:

1. Understand how multiple research approaches can be successfully integrated into a sustainable tourism planning process.
2. Understand the importance of triangulation in the tourism research and planning process, and how mixed methods approaches enhance and validate research findings.
3. Differentiate between multi-disciplinary and transdisciplinary approaches and understand how transdisciplinary approaches collaboratively engage researchers, the community, and stakeholder groups in the tourism development process.
4. Reflect on current research and outreach processes, and identify how mixed methods and/or transdisciplinary approaches could enhance their work and deepen community engagement.
The Issue, Opportunity or Trend

Sustainable rural tourism is recognized for its potential to improve communities’ economic viability, preserve and enhance cultural and natural assets, and benefit both host communities and tourists (Bramwell, 1994; Lane & Kastenholz, 2015). Successful rural tourism development requires that communities understand their development potential; generate local support; secure public and private investment; manage natural, human, and financial resources; and build an image for their community (Brown, 2002). However, in many cases inadequate planning, poor alignment of tourism and community economic development goals, and limited participation by residents and stakeholders hamper tourism development (Keogh, 1990; McKercher, Wang, & Park, 2015).

Participatory planning can offset unintended impacts of tourism development including anger, apathy, or mistrust of tourists by locals and generate more successful outcomes for the community and visitors (Gursoy, Jurowski, & Uysal, 2002). However, to be successful the planning process must creatively and thoroughly address the breadth of interests, opinions, and real and perceived challenges felt by residents, visitors, and local stakeholders. This may be most effectively accomplished through a mixed-methods approach that draws from multiple perspectives (Hollinshead & Jamal, 2007; Lane, 2009; McGehee, Lee, O'Bannon, & Perdue, 2010). Using multiple methods of inquiry offers several benefits to researchers and the community at large: First, the diversity of methods encourages participation from a larger audience thereby increasing engagement. Second, it recognizes tourism’s inherently interdisciplinary nature and encourages cross-disciplinary teamwork, facilitated reflection, and the advancement of ideas (Cole, 2014; McGehee et al., 2013). Finally, it allows for triangulation and increased data robustness, thereby enhancing the validity of inferences and better linking causes and consequences (Molina-Azorin & Font, 2016).

The West Virginia University (WVU) Rural Tourism Design Team (RTDT) implemented a mixed-methods, transdisciplinary planning and design process to support the development of a cultural tourism performance agenda for the Tucker County, West Virginia Cultural District Authority (CDA). Transdisciplinary partnerships improved upon interdisciplinary experiences by immersing faculty, students, and local stakeholders in one another’s work. In the process, partners shared assets, expertise, and experiences generating richer outputs and strengthening communication and trust.

Although the project relied on methods well-documented in tourism literature, there are few examples of how the components have been successfully integrated in part or whole, to broadly address communities’ tourism planning and community development needs. When applied together, the process identified gaps in product offerings for development, places and cultural elements that could be leveraged for tourism development, and sacred places and cultural elements that should be preserved for the community.
The Innovation
Case Context

Tucker County is a rural county located in West Virginia’s Potomac Highlands. The county is geographically and culturally divided: The county seat of Parsons, Hambleton, Hendricks, and St. George lie in the Cheat River valley at elevations of ~1,500 feet above sea level. Several miles and hundreds of feet higher are the communities of Thomas and Davis (~3,100 feet above sea level) which are situated near parks, ski resorts, and recreational assets. The county’s economy was traditionally dependent on natural resource extraction, specifically coal and timber. By the mid-1950s resources were largely exhausted uprooting industries and residents. With a population of 6,966 in 2015, Tucker County is West Virginia’s second-least populous county; median household income in the county was $40,533, nearly 30% below the national average (U.S. Census Bureau, 2018). Tucker County is classified as ‘transitional’ by the Appalachian Regional Commission, indicating that it ranks between the worst 25 percent and the best 25 percent of the nation’s counties on economic measures including unemployment, per capita income, and the poverty rate.

Today, due to improved land management practices and a changing environmental ethos, Tucker County is positioning itself as a four-season tourism destination. Visitors contributed $42 million in direct spending to the county’s economy in 2013, supporting an estimated 700 jobs (Dean Runyan Associates, 2015). The county’s many and varied outdoor recreational activities are key to both the region and the state’s “Wild and Wonderful” image. More than half of the county is comprised of public lands including two state parks and large swaths of the Monongahela National Forest; outdoor recreational activities are enhanced by a growing rural creative class of artists, artisans and patrons of the performing arts. Moreover, there is strong community-based support to develop and enhance these outdoor and cultural tourism components. Identifying and preserving these local assets has become of increased importance following the completion of Appalachian Development Highway System, Corridor H, a four-lane highway that puts the once isolated county within less than 2.5 hours of metropolitan centers in Washington D.C. and Northern Virginia (Figures 1 and 2).

Stakeholders Involved

Recognizing the economic potential of the region’s cultural and natural resources, the West Virginia State Legislature created the Tucker County CDA in 2013 to preserve and enhance the county’s unique artistic, cultural, historical and recreational assets to promote culture, education and tourism in Tucker County. In 2016, the CDA received funding from the Claude Worthington Benedum Foundation to develop a common vision for cultural tourism, link assets, develop a leadership network, and create a performance agenda for the county and organization. To fully address the complexities of the project the CDA engaged the WVU RTDT, a transdisciplinary group comprised of Extension Service specialists and faculty and students from the Recreation, Parks, and Tourism Resources; Landscape Architecture; and Graphic Design programs. The project engaged a breadth of local tourism and economic development stakeholders (Table 1) including the local Chamber of Commerce, Economic Development Authority, County Commission, and Convention and Visitors Bureau representatives; county and municipal government leaders; and businesses and non-profit organizations.
Figure 1. Context Map Situating Davis, West Virginia in the United States

Figure 2. Corridor H Connecting Davis, West Virginia, Tucker County, and Major Metro Areas
Table 1. Tucker County and State Tourism and Economic Development Stakeholders and Their Activities

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<thead>
<tr>
<th>Activity/Area of Focus</th>
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<td>Destination Management &amp; Marketing</td>
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<td>Cultural District Authority</td>
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<td>National Youth Science Foundation</td>
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<td>WV Department of Natural Resources</td>
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<td>Canaan Valley Resort</td>
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<td>Blackwater Falls State Park</td>
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<td>New Historic Thomas</td>
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<td>Entrepreneurship</td>
<td>Tucker County Economic Development Authority</td>
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<td>WVU Launch Lab</td>
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<td>Local/Heritage Foods</td>
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<td>Cultural Heritage</td>
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<td>Alpine Heritage Preservation</td>
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<td>Friends of the Blackwater</td>
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Approach Used and the Impact

The RTDT employs a mixed-methods and multi-perspective approach to tourism development planning which intrinsically acknowledges the field’s interdisciplinary nature. The use of multiple distinct methods of both qualitative and quantitative evidence establish confidence and confirm research findings and stakeholders’ perspectives. It also provides a breadth of techniques to engage a diversity of stakeholders, a core tenant of sustainable tourism. The transdisciplinary approach expands the traditional “community of practice” beyond the research team to include residents, visitors, and stakeholders, allowing each group to learn from one another’s perspectives and research findings. The result is a richer understanding of the context for planning, more relevant and vigorous outputs, and ultimately increased citizen control of the planning process.

In Tucker County, planning activities acquired information from three groups of primary stakeholders (leadership, residents, and visitors), and uncovered and emphasized assets, successes, and strengths which were employed to develop place-specific action strategies. The RTDT Asset-Based Community Development (ABCD) approach included eight primary research phases conducted over a one-year period: key informant interviews, resident attitudes toward tourism survey, visitor preferences survey, economic impact analysis (current and development options), community asset inventory and mapping, service-learning landscape design/visualization of opportunities and sites targeted for development, and social design. The research initiated in the first four phases provided the team with a thorough understanding of research problems and complex phenomena. Findings in the initial stages informed design activities at latter stages helping the destination take sequential steps toward achieving their goals and objectives.

Phase 1: Key informant interviews

Identifying the perceptions and attitudes of stakeholders toward the development of tourism in a community should be a first step in tourism planning to ensure trust, cooperation, harmony and mutual benefit for all those involved. This is especially true regarding the engagement of destination leaders or “key informants” who exert significant influence over local promotion, development, and management planning decisions.

To collect information on specific tourism opportunities and challenges, in-depth semi-structured individual interviews were conducted with 30 key informants representing a range of tourism-related organizations. Stakeholders were selected to cover a diversity of perspectives throughout the County utilizing a traditional snowball technique based on recommendations by board members of the Tucker County CDA.

Common themes identified in the key informant interviews included maintaining authenticity and sense of place, economic diversification, seasonality and low wage jobs, consistent hours of operation, finding and retaining employees, employee awareness of tourism assets, affordable housing, developing infrastructure and public services, signage, resorts being more engaged with community activities and attractions, creating a common identity, and coordination of activities. Maintaining a sense of place, especially considering the development of Corridor H and the commercialization that has followed improved access in other destinations was also of high concern.
The importance of attracting the right kind of visitor was also apparent. According to one stakeholder, “the type of tourists I personally want to encourage are the stewards of the outdoors, people who are concerned about what they leave behind and what sort of footprint they’re making”. In addition to attracting this type of visitor, key informants saw an opportunity to develop a quality of life that would encourage visitors to ultimately become permanent residents.

Important challenges to providing services to visitors and managing sustainable tourism growth were also identified. These included seasonality, finding and retaining qualified employees, sustaining volunteers, and the need for a common vision to guide local tourism development.

Phase 2: Resident attitudes toward tourism survey

Supportive residents are a key ingredient to high quality visitor experiences (Fick & Ritchie, 1991). Additionally, community relationships and a comprehension of a community’s social capital is vital to understanding whether it is ready to undertake tourism development in a significant way (Macbeth, Carson, and Northcote, 2004). According to Grootaert (1998), social capital facilitates three key activities which contribute to the general economic success of a community: information sharing, coordination of activities, and collective decision-making. All three activities can also be considered key to successful tourism development. Information sharing is vital for those involved in tourism, as information is important to the success of such a rapidly changing industry; an understanding of the tourism destination as a package of accommodations, restaurants, and attractions that requires coordination and collaboration is also vital to success; finally, collective decision making depends heavily on the conflict management capabilities of a community and its ability to addresses emerging issues. The most successful destinations have found ways to engage in collective decision-making about the goals of the community and how they can be met through the development of a cohesive tourism product that leverages assets and integrates the breadth of stakeholders’ self-interests (McGehee et al., 2010).

The RTDT’s survey instrument for this study included Likert scale items designed to measure residents’ perceptions toward tourism development, support for tourism, and social capital in the county (Gursoy, Jurowski, & Uysal, 2002; Gursoy & Rutherford, 2004; Lankford & Howard, 1994; Nunkoo & Ramkissoon, 2010; Jones, 2005; Flora, 2004; Onyx & Bullen, 2000; and Park, Nunkoo, & Yoon, 2015). The instrument also included an importance-performance analysis of tourism attributes, ranking of tourism development opportunities, open-ended questions, and demographics. The methodology followed the Dillman, Smyth, & Christian’s (2014) “tailored design method.” 637 resident surveys were completed and returned for a 17.6% return rate.

An overwhelming majority agreed that Tucker County was rich in outdoor recreation resources, but significantly fewer felt these assets were marketed effectively. Residents were less likely to recognize historic or cultural assets as contributing to the regions tourism base. Respondents were supportive of tourism as an economic development strategy with more than two-thirds agreeing or strongly agreeing that tourism development could provide additional economic opportunity. When asked about tourism development opportunities the highest ranked included nature tourism, unique local shopping, local restaurants, festivals/events, and accommodations. The lowest ranked were casinos, theme parks, and chain/big box shopping. Open-ended questions, such as “What does tourism mean to you?” revealed mixed opinions about tourism as an economic development strategy. Positive comments were related to economic development, jobs, and sharing the community with outsiders. Others saw little or no benefit, or expressed negative comments related to problems such as low paying, seasonal jobs.
There was an acknowledgement that tourism was not well developed, and that the community should do more to promote its assets to visitors. Like stakeholder responses, residents recognized a need to balance tourism development with the protection of community values and long-term planning. Unfortunately, when asked about social capital (networks, acceptance, and cooperation) less than one-third of respondents felt there were strong social networks between the county’s communities/municipalities. Fewer felt that individuals and organizations cooperate to achieve collective goals. These feelings were also reflected in other answers. For example, less than half of respondents felt the county had a collective identity, and less than one-third agreed that the county was working toward a common vision.

Phase 3: Visitor preferences survey

Tourism market research on the motives, behaviors, interests, information sources used, and demographic characteristics is essential to effectively market destination attributes and ensure a quality visitor experience (Dolnicar & Leisch, 2008; Hassan, 2000). A better understanding of current visitors can help ensure quality experiences and may encourage additional visitor expenditures or longer visits to a destination (McGehee et al., 2013).

A survey to assess visitor preferences was designed by the research team, and administered by faculty and students at varying events and attractions in the County. The survey included Likert scale items designed to measure visitor’s perceptions of tourism development, purpose of visit, main attractions visited, trip size and duration, demographic information, and visitor comments. A total of 266 surveys were completed. Respondents’ ages varied; however, most respondents were well-educated (45% had a graduate degree), and affluent (42% of respondents had an annual family income of more than $100,000). Over 80% of visitors resided in-state or in border states.

Nearly all respondents (95%) identified nature-based attractions as a primary draw to the county. Most visitors indicated visiting Blackwater Falls State Park followed by Canaan Valley State Park/Resort. Cultural and historic attractions were less likely to be recognized. Satisfaction with the visitor experience was high: 64% strongly agreed that they were satisfied with their experience visiting the destination, 72% strongly agreed that they would recommend the destination to their family or friends, and 79% strongly agreed that they would revisit the destination in the future.

Nearly two-thirds stated that the area had potential for additional tourism development. However, like stakeholders and residents, nearly 60% of respondents agreed or strongly agreed that the quality of tourism in this destination would be negatively impacted without long-term planning and managed growth.

Phase 4: Economic impact analysis

There is a breadth of literature on the economic potential of tourism activities and methods for quantifying the sector’s impact on both large and small economies (Dwyer, Forsyth, & Spurr, 2004; Song, Dwyer, Li, & Cao, 2012). This element of the project included quantifying the tourism sector’s economic contribution to the county’s economy; better understanding business’s needs, motivations, and expectations; and establishing a baseline to quantify the impact of tourism related policy decisions on local businesses.

The industry’s economic contribution was quantified using a hybrid input-output model based on county specific 2015 IMPLAN data supplemented with employment and earnings data from survey respondents, the
most current data from federal and state employment agencies (Bureau of Labor Statistics, Quarterly Census of Employment and Wages; Workforce West Virginia), and private data sources. The total economic contribution of the tourism sector was estimated at 970 jobs and $44 million in income.

Most businesses were well established in the community. Many owners identified quality of life factors as key reasons for establishing their business in the county citing a simple way of life, natural beauty, recreation opportunities, and the low-costs of doing business. Businesses’ outlook for the future of the County’s tourism industry was overwhelmingly positive. However, concerns were expressed regarding seasonality, especially for outdoor outfitters and retail establishments, and low wage rates which averaged just over $18,000 per worker; few businesses (35%) could offer employees benefits.

Qualitative data pointed to both opportunities and threats facing the industry. For example, respondents noted the positive impact on visitation from the completion of Corridor H; however, many businesses have already noticed a different type of tourist, one focused less on outdoor adventure and more on sightseeing, entertainment, and amenities. Anticipated growth and the changing nature of tourism has encouraged business owners to advocate for increased planning to protect assets which define tourism in the traditional mountain communities, and consciously diversify and develop amenities desired by new and returning visitors. This includes deliberate efforts to identify new opportunities and markets in Tucker County’s valley communities which have not traditionally benefited from tourism development.

Phase 5: Participatory Asset Identification and Mapping

Participatory Geographic Information Systems (PGIS) integrates the use of GIS and mapping at local levels to engage and empower community-based resource assessment, planning, and decision making. The participatory approaches of PGIS have evolved since its inception in the 1990s from paper map-based and internet-based, to interactive interface-based, including the use of tools like Google Maps and ArcGIS Flex Viewer (Brown, 2012). When integrated with location-based service applications, research has shown that GIS can assist tourists in the discovery or identification of previously unknown destinations and their businesses, recreational opportunities, cultural/historic amenities and government/information centers (Dye & Shaw, 2007; Poslad et al., 2001). GIS also provides valuable information to business owners, government leaders and other local stakeholders through the identification of tourism assets, site selection and location analysis, the development of tourism planning scenarios and the identification of existing or potential tourism visitor flow patterns (Chen, 2007; McAdam, 1999).

Working with residents and stakeholders, the RTDT developed a comprehensive inventory and mapped representation of available tourism and recreation resources that could be promoted or enhanced for both visitors and residents. The analysis began with existing statewide datasets and spatial data layers which were supplemented with local data collected by a CDA Americorps volunteer. Identified assets included local, state and federally managed recreational facilities (parks, trails, recreational sites, other specially designated areas), cultural venues, and historic sites; and business locations of interest to visitors including restaurants, accommodations, specialty retail establishments, grocery stores, convenience stores, agri-tourism sites, etc. Community involvement in the asset mapping process included identification of data gaps, information collection on additional assets, and the status classification for each asset (i.e. “visitor ready”).
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Data were combined into an ARC GIS online map (see figure 3) which was embedded into the Tucker Culture website to be utilized by residents and visitors to identify and locate identified assets (https://www.tuckerculture.com/interactive-asset-map/).

Figure 3. GIS-Based Map of Tucker County Assets

Phase 6: Mapping of opportunities and priorities for tourism development and landscape design/visualization of sites targeted for development

Participatory planning and design includes work with disenfranchised and underserved populations (Hester 2006, Thering 2007, Sanoff, 2010) through service-learning (Angotti, Doble & Horrigan, 2012; Bose, Horrigan, Doble, & Shipp, 2014) designed to increases citizen control, delegated power, and partnership (Arnstein’s “Ladder of Citizen Participation,” 1969). The RTDT’s Landscape Architecture Extension Specialist developed methods that provided viable products to the County and communities and satisfied many of the desired goals of service-learning: building capacity for student learning and leadership; providing experiences that highlight and strengthen inclusive communities; creating authentic experiences for community members and students in collaborative projects; and promoting principles of democracy, compassion and cultural diversity through civic engagement (adapted from West Virginia University, 2017). Specific activities included focus groups to identify opportunities for site development, corridor management, and district wide proposals; workshops with stakeholder groups to generate designs and visualizations for the opportunities; and community workshops for participatory spatial analysis of local and countywide resources (Figure 4).
Results of these exercises were entered into the growing GIS database. Follow-up work with the CDA used the mapped information to rank projects. For example, sites identified as assets, but which were undeveloped for community and touristic needs, were considered high-priority. Many of the identified assets were undeveloped corridors, especially those already used locally for hiking and biking, but which were not readily signed or accessible for the tourist.

The site development priorities were designed by a landscape architecture graduate student and students in design studio courses as participatory charrettes and service-learning experiences. Students worked in the studio and with community members, creating over twenty alternative design scenarios. The graduate student then worked with local stakeholders to create a single vision for the designs.

In addition to designs focused specifically on tourism assets, projects also included design changes to enhance the local quality of life. For example, students designed plans for enhanced multimodal circulation, affordable housing (Figure 5), a community centre, and the design of a waterfront park on the Blackwater River (Figure 6); projects in Canaan Valley emphasized affordable housing and a health care centre; projects in Thomas focused on neighbourhood revitalization and affordable housing. The designs expressed goals and objectives derived from surveys and workshops.
Figure 5. Davis Streetscape with Proposed Affordable Housing

Figure 6: Davis Waterfront Park with Mixed Use Building in Background
Phase 7: Social design to create a cultural identity

Transdisciplinary Design is characterized by both collaboration of specialists in varying fields and the integration of community members who are given equal power and voice in the process. Listening to these community partners is critical for generating products that fit with the local culture and are embraced by residents. A key component in human-centered design involves “creating the conversation” to uncover the purpose and need for an identity to facilitate the goals of the community. In creating the identity or community brand, it became necessary to distinguish the role of the communities’ shared “Tucker Culture” from the narrower goals of tourism development entities. The brand in this case was about creating solidarity for residents countywide in all their diversity, while simultaneously allowing them to protect, enhance, and promote the assets of the area. Residents, visitors, summer home owners all become stakeholders in the message that becomes the cultural brand.

Using participatory design methods, the WVU graphic design team, local stakeholders, and residents co-created a connecting visual message to engage residents and visitors in Tucker County culture. Five workshops were held across the county to generate and prioritize important descriptive words and visual representations that reflected residents’ beliefs about what their community held dear. This information was translated into visual communications which included new branding motifs and integration into existing state, county, and local branding to assess both cultural relevancy and style preferences. Three sets of proposed identities with applications for signage, apparel, and print materials were presented to communities. Information collected from follow-up events led the graphic design team in new directions and created trust and buy-in from the residents and board who attended.

Discoveries through the workshops revealed both common beliefs and divisions which ranged from historic memory of painful events including school consolidation and the hostile moving of the county seat (over 100 years earlier); a generational divide between entrepreneurs; and a geographic divide between the valley and mountain towns who have differences in visitor/tourism relationships to their economies. The charge of the design team was to acknowledge these differences and reframe them as important community history, opportunities to learn from one another’s experiences, and valuable lessons for addressing the coming changes and need for planning associated with increased visitation from Corridor H. The common ground was reframed as advantages that connect experiences of shared resilience and create a tapestry of culture rooted in tenacity in surviving harsh winters, and loving nature and rural wilderness.

The final moniker of Tucker Culture was a hexagon divided into segments that held linear patterns of icons representing wilderness, mountains, hiking, skiing, biking, rivers, farming, arts, music, and industry that included railroads, lumber and mining. These patterns overlapped the segments, as did the color set, showing that independence and each towns’ unique features are unified by a common culture, which like a quilt, combine to make a singular Tucker Culture. The color palette reflects the autumn deciduous forest and evening skies that define the elevated wilderness region. The new symbol set offered the ability for some icons to be selected over others to personalize the mark for individual towns or organizations in the Tucker Culture domain. The variations can be seen on the front of the original brochures—Arts, History, and Recreation (Figure 7). A kit was developed that can be used at meetings to explain branding possibilities, signage ideas, buttons,
and post cards for hypothetical events that might bring people together for activities that involve storytelling, work parties, and other events that help increase community collaboration.

Figure 7: Tucker Culture Brochures

**Implications & Lessons learned**

The RTDT’s methods of triangulation provided increased understanding of research problems and complex phenomena, incorporated a diversity of perspectives, and encouraged broader and deeper stakeholder engagement. Through the process, common opportunities and challenges were identified, including maintaining authenticity and a sense of place, economic diversification, seasonality and low wage jobs, finding and retaining employees, affordable employee housing options, the need for improved infrastructure and public services, long term planning and managed growth, protecting community values, promoting existing assets, and promoting identified but underutilized assets.

Design faculty used participatory design including cultural asset mapping, identification of gaps in attractions and services, site design of prioritized development sites, and the visualization of a cultural identity through branding to further visualize and address key findings from the initial research phases. These follow-up activities leveraged information gained in earlier stages and breathed life into follow-up activities that are enhancing Tucker County as a rural tourism destination.

The county translated research outputs and recommendations into community impacts including establishing a destination management framework (Figure 8), hiring a full-time county planner, and signage improvements that incorporate a unified branding strategy. Although community capacity and resource development remain a challenge, new partners have been engaged to maintain momentum. The CDA and RTDT faculty are
partnering with the US Forest Service to extend the RTDT model to other counties and gateway communities in the Monongahela National Forest, leveraging new grant resources for asset mapping, and planting the seeds for larger regional efforts in the state.

The RTDT’s activities demonstrate the value of generating a knowledge base through varied research methods and how outputs can be scaffolded to generate richer and more useful information. The disciplinary walls between faculty researchers and between researchers and the community break down as opinions from a resident survey becomes tangible, spatially explicit maps of assets created through participatory GIS workshops. These visuals later become the basis for community plans to preserve and enhance assets which enrich residents’ quality of life and the visitor experience, and contribute to a more robust and resilient tourism economy. Faculty and student experiences are enhanced by modeling an authentic multi-disciplinary professional environment; community members not only receive, but have a hand in creating relevant and rigorous research products that inform development efforts and enhance citizen control of the planning process (Arnstein, 1969).

Developing partnerships that build capacity for positive change is at the core of the land grant mission. This includes better engaging and including stakeholders in the decision making and development process, and enhancing the exchange of knowledge between fields to provide context-sensitive solutions to community development problems. Undertaking similar community engagement projects requires faculty dedicated to the process, community willingness to take ownership of development decisions, and visionary leaders to guide the process. Though challenging to coordinate and execute, the benefits of longitudinal collaboration demonstrated by this project outweigh the costs in providing a robust, comprehensive, coherent, living product to stakeholders. Stakeholders understand clearly the issues uncovered in the inventory and data collection stage and see how their participatory voices are integrated as issues are addressed through design and visualization. The level of local ownership and stewardship of actionable items is enhanced through this scaffolded process leading to not only implementation, but control and ownership of the community’s tourism and community development process.
Discussion Questions

1. How did the research activities engage the community in the action research process? How does this type of engagement increase ownership of ideas and outcomes?
2. What benefits and challenges do you see, or have you experienced, in the participatory research process?
3. How would you define transdisciplinary research and engagement? How does it differ from traditional outreach and action research?
4. What faculty at your institution could be included in similar transdisciplinary engagement? Does your institution provide support for creating these transdisciplinary teams? How can this type of work be incentivized?
5. How can we as community and/or tourism development professionals measure the impact of programs with such diverse approaches, outputs, and impacts? How can these lessons and practices be better incorporated into discipline specific research publications?
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Expanding Agritourism In
Butte County, California

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Chapter Summary

This case study examines the strategies and impacts of collaboration among diverse Butte County stakeholders to support agritourism development and increase agritourism participation by out-of-area visitors to the sparsely populated rural county. The three local initiatives implemented were: the Sierra Oro Farm Trails’ Passport Weekend; the Tourism Business Improvement District’s Explore Butte County marketing program; and the county government’s agritourism-friendly programs. Overall, the hospitality industry’s collaboration with an agritourism association and other community organizations, in conjunction with supportive county regulations, low permitting fees and helpful county staff, appears to be generating continued growth of farm and ranch agritourism businesses and increased regional tourism in Butte County.

While the new Explore Butte County marketing program’s usage of the Passport Weekend’s materials led to easy inclusion of agritourism in its initial marketing campaigns, this practice excludes agritourism operations that are not members of Sierra Oro Farm Trails. Additionally, the new marketing program distributed initial zone grants proportionate to the funds contributed by hospitality industry members in each zone, which left out those rural communities with no hospitality industry members. The Tourism Business Improvement District may find it beneficial to recognize and promote more rural agritourism assets as part of marketing the region. In order to take best advantage of the increased marketing initiated by the hospitality industry, Butte County’s agritourism operations may benefit from committing to provide regular hours of operation at their tasting rooms and farm stands, and working to hone their hospitality skills.

Extension’s involvement to date with the County’s agritourism operations has been relatively limited. Targeted Extension support through a series of workshops regarding critical agritourism planning and operational challenges could strengthen the community’s rebuilding after the devastating 2018 Camp Fire.

3 This case study was partially funded by a USDA research and extension grant, AFRI Project #2014-68006-21842.
Learning Objectives:

1. Identify and explain the opportunities and challenges faced by small-scale farmers and ranchers in Butte County striving to develop financially successful agritourism enterprises.
2. Examine the strengths and shortcomings of Butte County government’s agritourism-supportive ordinances and other measures that have been implemented since 2010.
3. Assess potential strategies for continued and expanded collaboration among small-scale farmers and ranchers, Extension, diverse organizations and policymakers to sustainably grow agritourism enterprises, events and activities in Butte County.
4. Evaluate the advantages and disadvantages of the new Tourism Business Improvement District’s inclusion of agriculture/agritourism in its marketing efforts.

The Issue, Opportunity or Trend

Urbanization pressures and shrinking profits have led small-scale farmers and ranchers in California, and across the United States, Canada and Europe, to search for alternative strategies to increase their revenues. As public interest in local food and sustainable farming practices increases consumers’ demand for on-farm experiences, a growing number of producers are considering diversifying with agritourism operations to spread risk and add value to their existing enterprises.

Most research regarding agritourism in the United States has focused on its economic benefits (Nickerson, et al., 2001; McGehee and Kim, 2004; Barbieri, 2013). The results of a 2009 survey of agritourism operations in California indicated that their profitability varied significantly among geographic regions and by primary agritourism activity, and increased with the age of the agritourism operation (Rilla, et al., 2011). In the European Union, the change in agricultural policy from a production focus to a redeployment of farm resources into farm diversification has significantly increased the number of farms with agritourism enterprises (Ilbery, 1991).

There is limited government policy in the United States supporting agritourism. Agriculture departments in a few of the fifty states (such as Colorado, Kentucky, North Carolina, Vermont, Virginia and West Virginia) are collaborating with university Extension faculty to support farms and ranches operating or developing agritourism operations. In California, state level agritourism-related regulatory changes have been incremental. “Agricultural homestay” legislation was passed in 1998 in California to allow working farms to host a limited number of overnight visitors and permit farm families to serve meals cooked in the farm kitchen to visitors. In 2009, regulations were adopted that enabled farms in California to sell processed agricultural products, such as jams, preserves, pickles, juices, cured olives and other “value-added” products made with ingredients produced on or near the farm at their farm stands.

In California, county governments bear the primary responsibility for regulating agritourism operations on agricultural land within their boundaries. Recently, a few counties have added a combined agriculture and economic development element to their General Plans. They have followed up by revising their zoning codes to support their goal of expanding agritourism. In the case of Butte County, the county also created an
assessment district to fund tourism promotion activities. In this case study, we examine how farmers, local organizations, and government agencies in Butte County have joined forces to enhance agritourism and general tourism opportunities in their sparsely populated county.

The Innovation
Case Context

Butte County is a primarily rural county in Northern California. A network of farmers, county staff and local organizations is striving to expand agritourism in the county to enhance the economic viability of smaller farms and to create assets that benefit the hospitality industry and community economic development in general. In 2017, the county had 229,294 residents, and its median household income was 30 percent below the state’s median of $63,783 (US Census Bureau, 2017).

The county’s primary attraction for visitors is its natural beauty and outdoor recreational activities (Applied Development Economics, 2007), including a national park and 28 miles of scenic byway (Federal Highway Administration, 2015). Additionally, the nation’s seventh largest brewery, Sierra Nevada Brewery, is based in Chico, the county’s largest city (population of 93,983—US Census Bureau, 2017). Butte County is a one-and-a-half hour drive from an urban area with more than 250,000 people (Sacramento); its remoteness limits visitor numbers (see Fig. 1). Additionally, its lack of clustered venues makes navigation a challenge for visitors.

![Fig. 1](image)

Butte County’s chief economic driver is agriculture, with walnuts, almonds and rice generating more than 77 percent of the county’s agricultural income in 2016 (Butte County Agricultural Commissioner, 2017). Most of the county’s large-scale crop and livestock production is marketed through conventional wholesale channels. Thus, agritourism operations in Butte County are usually part of smaller-scale farms marketing a broad range of products including wine, olive oil, citrus, apples, nuts, cheese, meat and nursery plants.
Small-scale growers in the county have been operating fruit stands for a century. Wineries and seasonal pumpkin patches started in the Oroville area in the 1980s, and a few olive oil producers have recently opened tasting rooms. Most of the wineries currently have small vineyards; they are essentially at a pilot stage, assessing the suitability of various grape varieties and testing consumer response to their wines (Dunne, 2017).

Extension’s involvement with agritourism operations in Butte County has been relatively limited. The University of California (UC) Small Farm Program (part of UC Cooperative Extension) conducted a survey of California agritourism operators in 2009. They identified permits, regulations and risk management as their most significant challenges (Rilla et al. 2011, with similar findings in a 2015 survey). In 2011, the Small Farm Program organized a grant-funded workshop in the Northern Valley which included speakers and agritourism operators from Butte County. The daylong Growing Agritourism workshop covered the essential elements of assisting farmers and ranchers to establish, develop and market profitable agritourism businesses and sustainable regional agritourism organizations, using the UC ANR publication, Agritourism and Nature Tourism in California, and additional resources as curriculum materials. The Small Farm Program has distributed at least 600 copies of this guide book at workshops throughout California since 2011. In 2013, the Small Farm Program initiated a grant-funded Building a Farm Trail project to bring three newly developed agritourism associations in Northern California together to learn from each other, and to work with marketing, tourism and economic development experts to create Farm Trail maps, websites and collaborative events in each region. One of the agritourism associations was North Yuba Grown, whose 24 members currently includes four wineries, an olive oil ranch and a farm in southern Butte County; project details are described in Appendix A.

Thus, agritourism in Butte County is still relatively young; it is not a significant part of the county’s agricultural economy. Tourism, hospitality, planning and economic development entities in the county have recognized, studied and supported the development of agritourism for more than ten years, but have not had much funding for most of that time to invest in the development of a marketing strategy.

Stakeholders Involved

This case study examines the strategies and impacts of collaboration among diverse Butte County stakeholders to support agritourism development and increase agritourism participation by out-of-area visitors. Three local initiatives—Sierra Oro Farm Trails’ Passport Weekend, the Tourism Business Improvement District’s Explore Butte County marketing program and Butte County zoning ordinances favorable to agritourism development—have been implemented to increase agritourism activity of the region. Four major stakeholder groups were identified as being significantly involved with these initiatives: farmers with agritourism operations; the organizer of the Sierra Oro Farm Association; Butte County government staff and elected officials; and leaders of local organizations involved in tourism. The latter group includes members of Explore Butte County program, Chambers of Commerce and the local Farm Bureau.

Approach Used and the Impact

To examine the impact of the three Butte County initiatives on agritourism development by small-scale producers and on general tourism development in the region, twelve agritourism stakeholders were interviewed for this study between 2016 and 2018. They included three individual agritourism operators in the
Oroville region; the organizer of the Sierra Oro Farm Trail Association; Butte County’s Economic and Community Development Manager; the county’s Principal Planner; and leaders of the Oroville Chamber of Commerce, Butte County Farm Bureau, and the recently formed Tourism Business Improvement District (TBID). A consultant hired by Butte County to prepare a strategic marketing plan was also interviewed. The interviewed individuals are listed in Appendix B.

Agritourism Operators

The three agritourism operators who were interviewed (considered to be representative of the type and scale of Butte County agritourism operations) are described below. They are all members of North Yuba Grown.

Morse Farms has five acres planted in mandarin oranges. Both Glennda and John Morse are retired state employees. They bought the land in 1998, cleared it and began planting in 2002 while they were still working for the state. They also built a house and a small shop/farm stand. Morse Farms’ agritourism activities include the farm stand, some RV and garden club tours, and six years on the Sierra Oro Farm Trail annual self-guided Passport Weekend tour (see Fig. 2, photo of Morse Farms during a Passport Weekend tour).

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Fig. 2 Morse Farms, owners Glennda and John Morse

The Morses employ three part-time employees during their short winter harvest and selling season. About 70 percent of the fresh mandarins are sold direct to consumers at the farm stand and about 30 percent at fairs and other events. Glennda also has a Cottage Food Operation permit (to produce limited quantities of non-potentially-hazardous foods in a home kitchen for direct and local sales) and also uses a co-packer to produce other specialty food products to generate sales and make people aware of mandarins on a year-round basis. She also sells fruit to other local businesses that produce mandarin-infused beer and olive oil. About 30 percent of the Morse Farm’s specialty products are sold through about 50 stores, with the rest sold directly to consumers at the farm stand, online and at events.
The Hickmans currently farm 11 of the 15 acres they own, planted primarily in wine grapes. They have no employees, and only use family labor. The Hickmans have been farming for about twelve years; their tasting room has been open for eight years. Ninety-nine percent of their sales are direct to consumers through the tasting room. The tasting room, as allowed by right for small wineries in Butte County, is open three days each week and hosted, on average, 50 visitors a weekend in 2017 (see Fig. 3).

Fig. 3 Hickman Family Vineyards, owners Alyse and Todd Hickman

The Hickmans regularly host and pour wine for 1,000 visitors on the Sierra Oro Farm Trails Passport Weekend (see Fig. 3). In addition, Alyse is one of the main organizers and promoters of the North Sierra Wine Trail, an association of 14 small wineries in Butte and neighboring Yuba County that market collaboratively and organize annual Wine Trail Passport Weekends, drawing about 500-800 people to these events.

The Kellers farm twenty acres of mature olive trees in Butte County and another five acres in Yuba County. They have no regular farm employees, but contract with a picking crew for the harvest. Calolea sells at twelve weekly farmers’ markets and several seasonal events in Northern California. In 2016, about 45-50 percent of its sales were direct to consumer through farmers’ markets and the website, and 40 percent of sales were to stores. Distributors, including a local food hub, make up most of the balance of sales. They have an olive oil tasting room, which is open only for special events and by appointment. The only large-scale event they participate in is the Sierra Oro Farm Trail Passport Weekend, which they have done for the past seven years (see Fig. 4).
In addition to these interviews, we sent an email invitation to participate in an online survey to 51 agritourism operators in Butte County. Twelve responded to the survey, for a 24 percent response rate. Although no generalizations can be made based on the low number of responses received, it is interesting to note that none of the respondents offered lodging or outdoor recreation activities which are often some of the more profitable agritourism ventures (Rilla, et al., 2011). Furthermore, eleven of the twelve respondents reported that:

- Their agritourism business is less than twenty years old;
- They generated less than $25,000 in agritourism revenue in 2015;
- 85 percent or more of their agritourism revenue in 2015 was from direct sales of agricultural products to consumers; and
- They were open for agritourism activities 52 days or less in 2015.

Farm Trails Passport Weekend

**Sierra Oro Farm Trail Association** (SOFT) has organized an annual **Passport Weekend** self-guided tour event of Butte County member agritourism operations every fall since 2005. The founder, director and core staff of SOFT is marketing professional Nicole Johansson. She and her husband operate Lodestar Farm’s olive oil tasting room, which is adjacent to the farm’s 80-acre olive ranch in the Oroville region.

The SOFT Passport Weekend regularly sells out with a six-week online marketing campaign, capping sales of $30 tickets at 3,000 in 2018 to prevent overwhelming the 34 participating farms and wineries with more visitors than they can handle. SOFT charges farmers and wineries $250 to participate in the Passport Weekend and be included on the map (see Fig. 5 and Fig. 6) and website. Additionally, wineries are expected to pour tastes and others to offer tours and/or samples to all ticketed customers.
Fig. 5 Passport weekend map

Fig. 6
SOFT is attempting to extend marketing efforts for participating farms and wineries beyond the October Passport Weekend by promoting their other events and holiday shopping offerings. In addition, SOFT is closely involved in marketing SOFT members through Explore Butte County, as described below.

Explore Butte County

In 2007, the County commissioned a study to identify ways to diversify its economy and facilitate economic development. The Board of Supervisors accepted the report’s recommendation to develop a countywide tourism marketing strategy. In 2012, the County appointed a Countywide Tourism Strategy Steering Committee, which identified a TBID as a potential funding source for implementing the tourism strategy. Butte County finalized the Tourism Business Improvement District (TBID) in November 2015; it provided funds to develop the Explore Butte County marketing program in 2016. The TBID is funded by an assessment of two percent of revenues on overnight stays at participating members of the hospitality industry, while the Transient Occupancy Tax (TOT) is paid by all guests to all lodging operations and then remitted to the municipality. The Butte County TBID is directed by a board composed primarily of hospitality industry members, but also includes SOFT’s organizer. It adopted the slogan, “Explore Butte County,” hired an executive director and launched a website (Fig. 7) in 2017. It also hired a marketing communications coordinator in 2018.

As of August 2018, the TBID had 55 hospitality industry members who collect lodging fees to fund the program. Membership locations are 80 percent Chico (the county’s largest town and home of California State University, Chico); 10 percent Oroville; 5 percent Paradise; and 5 percent unincorporated areas of the county. In 2017, 75 percent of the TBID revenue came from Chico, followed by 17 percent from Oroville, 7 percent from Paradise, and 1 percent from the county’s unincorporated areas.

TBID revenues were $621,000 in 2016 and $817,000 in 2017. The sharp growth in revenue is due to the fact that hotels were sold out in 2017 because of a major repair project at the Oroville Dam. The Camp Fire started in northern Butte County on November 8, 2018. It destroyed 13,972 residences and 528 commercial buildings in the county, with insurance claims totaling $7 billion. Three agritourism operations are known to have been damaged extensively. Although the fire caused the lodging occupancy rate in Butte County to increase to 99 percent, TBID revenues declined because no TBID taxes are collected on long-term lodging (occupied for more than 30 days). Thus, 2018 TBID revenues are estimated to decrease slightly to $785,000. None of these fluctuations are yet related to Explore Butte County marketing activities, which started in August 2018 with an agritourism focus. Marketing efforts were suspended due to the Camp Fire; they resumed in February 2019. The marketing plan is designed to increase lodging revenues, and thus TBID revenues, by about 3 percent year to year.

Below are descriptions of Explore Butte County funded programs:

- Its website launched in August, 2017. In addition to agritourism, the website features outdoor recreation, shopping, restaurants, breweries, and arts-related attractions.

- A media campaign featuring agritourism targeted to potential visitors from the San Francisco Bay Area ran for 3 months in fall 2018 with the theme, “Meet the Farmer in Butte County.” This media campaign was built around the assets created by SOFT, including videos, and only shared stories of its members. A map of SOFT members will soon be added to the Explore Butte County website. Later campaigns include outdoor adventures with a family-friendly itinerary and a “restaurant week”.
• TBID money is funding a **Certified Tourism Ambassador (CTA) training program** to build knowledge, local pride and hospitality skills among local workers who are most likely to engage with visitors. The initial sessions will be targeted toward hotel front-line staff. The CTA program will be a line item in the TBID annual budget, and will include quarterly field trips and a binder for each participant. The CTA program is customized for each destination through extensive research. The learning material covers the important elements of tourism, regional attributes/attractions, resources, and a customer service refresher in four, in-depth modules.

• Zone marketing grants comprise 10 percent of the TBID budget. The grants are allocated to the zones in proportion to the funding raised in that zone. The application process favors event-based or larger project-based support, such as signage. One of the first zone grants of $15,000 was given to the Oroville Chamber of Commerce. The grant was used by the Chamber to promote the Oroville area and downtown events to people from outside the Oroville region. It helped promote a farm-to-table dinner in October 2018 organized by the Oroville Downtown Association. The grant will also pay for boosted Facebook posts and the creation of “story maps” on the chamber’s website. Story maps are a multi-media tool used to show the locations of different attractions or events on a map, sometimes using different icons for different categories of activities offered. They combine maps such as farm trail tour maps with narrative text, images and multimedia content to create enriched online marketing as well as education about a region. They allow the viewer to click on the location point to learn more about that location, activity or business using text, videos and pictures. The first story map is about local museums; the second will be a mini farm trail featuring promotion of local ranches, farm stands, olive oil growers, rice growers, and mandarin orchards.

**Agritourism-supportive county government**

Agritourism-friendly measures adopted by Butte County’s government since 2010 are highlighted below.

• Small winery, olive oil, fruit and nut, micro-brewery and micro-distillery production facilities are allowed to open tasting rooms and sell products they produce with a relatively low-cost “administrative permit.”

• A **Unique Agriculture Overlay** (Overlay) adopted in 2010, allows many agritourism activities, including events, farm stays, tours, tastings and other activities “by right” within several agricultural regions.

• Special event facilities, used for weddings, parties, corporate events and other such gatherings, are allowed; however, they are required to apply for a more costly “Minor Use Permit” to operate unless they are within the Unique Agricultural Overlay zone.

• The county is finalizing its short-term rental ordinance, which will provide more visitor lodging options in rural areas. Butte County’s Principal Planner noted that the county Farm Bureau remained neutral on this new ordinance, on the condition that people offering such lodging within agricultural zoning areas sign an acknowledgement of the Right-to-Farm ordinance.

• Applicable zoning ordinances that detail the activities allowed in different scales of operations and in different zones are readily available and clearly written.

• The Planning Department publishes a list of approved Special Event Facilities in Butte County, and will soon publish a list of approved short-term rentals.

• The Environmental Health Department’s fees for the registration and licensing of Cottage Food Operations, and for sales of these products at fairs and festival events, are lower than such fees in
most other counties. Farmers report that Butte County Environmental Health Department staff is easy to work with.

Implications & Lessons learned

Case Context

The hospitality industry’s collaboration with an agritourism association and other community organizations, in conjunction with supportive county regulations, low permitting fees and helpful county staff, appears to be generating continued growth of farm and ranch agritourism businesses and increased regional tourism in Butte County. Additional Extension involvement, such as providing a series of workshops addressing key planning and operating issues with take-home exercises and facilitation of connections for ongoing support, could strengthen the development of new and existing agritourism operations.

County regulations and ordinances: Opinions regarding the success of the Overlay and other agritourism ordinances in developing successful agritourism operations are mixed. The ordinance has enabled small wineries to remain viable, with tasting rooms allowed by right. Some county staff consider it to be successful and well-received by the agritourism community. However, other staff indicate that the overlay has not generated the economic impact that the county had imagined. Regulations, including Americans with Disabilities Act’s requirements and restroom requirements for an event facility, still present barriers to new agritourism operations. Tour busses are prohibited from visiting small wineries unless they are in the Overlay; this limits visitors to these facilities to some extent. Current agritourism operators were generally pleased with the ease of permitting created by the Overlay and other ordinances, helpful staff and low permitting fees, and have continued to slowly expand their operations and activities. During the two years of this study, several new agritourism operations have opened, including a U-Pick cherry operation, a few new pumpkin patches and a farm store located on a major highway. Several new special event permits have been approved.

Sierra Oro Farm Trails: Agritourism operators generally reported a positive return on investment from the SOFT Passport Weekend event, with the event growing in popularity and generating increases in product sales. They noted that the event raises visitor awareness and encourages return visits to buy more products, as well as generating subsequent sales online and at farmers markets. It is difficult to measure the spillover impact of the Passport Weekend on the community, but anecdotally organizers believe there are positive impacts resulting from visitor spending on food, gas and lodging. Hotels are usually sold out on Passport Weekend. In addition, many visitors stay with friends and spend money in town.

Some smaller wineries that participate in the SOFT Passport Weekend report that the increasing popularity of the event, along with the expectation that all visitors receive free wine tastings at each participating winery, is leading to decreasing returns on their participation. Some members of the North Sierra Wine Trail who participate in both SOFT and their own events noted that although their winery association’s annual weekend event draws fewer visitors than the SOFT event, they sell more wine at their event while pouring fewer tastes and having more time to interact with customers. One winery and at least one other smaller orchard operation have dropped out of the SOFT Passport Weekend due to its growth and visitor expectations. However, the small orchard operator--Glennda Morse of Morse Farms--stressed the continuing benefits and visibility of their operation resulting from several years of participation in the SOFT Passport Weekend. “They literally put us on the map,” she said.
Collaboration among community organizations: Agritourism associations, including SOFT, North Yuba Grown and North Sierra Wine Trail, are important marketing organizations, dedicated to increasing their members' visibility and sales. The Chambers of Commerce have in recent years promoted local agritourism operations and activities to get visitors to “stay just one more night” in the region. The Farm Bureau runs the annual Farm City Celebration and the California Nut Festival. Butte County agritourism operators also market themselves individually through websites, social media, and email marketing. The collaborative efforts of these groups led to a recognition by the county’s hospitality industry of the value and potential of agritourism as a draw for out-of-region visitors.

Hospitality Industry’s Tourism Business Improvement District efforts: By including agritourism operations in TBID-funded tourism promotion and channeling funding to Chambers of Commerce and other local groups for events and promotional activities that benefit farms, the hospitality industry is supporting local farmers as it strives to pull in more visitors to stay in local hotels. Due to its newness, the impact of Explore Butte County program is currently unknown; however, it is expected to increase overnight stays by visitors to the area by 3 percent each year. In August 2018, two of the three agritourism operators interviewed had not yet heard of Explore Butte County, and had not been contacted by anyone connected with the program. Explore Butte County’s “Meet the Farmer in Butte County” marketing campaign relies on videos and maps created by SOFT, and only features selected members of that group. By utilizing already-created promotional content, Explore Butte County was quickly able to start featuring agritourism in outreach campaigns to potential urban visitors. However, agritourism operations (including wineries) that are not SOFT members or are in more rural Butte County locations with little or no hospitality TBID members may be excluded by this approach.

Lessons Learned

1. Community collaborations set the stage:

Many Butte County agritourism operations have been building momentum by collaborating with each other and with local nonfarm businesses. Their products are cross-promoted by breweries, restaurants and other businesses featuring their products; this builds a larger cluster of sites that can be visited. Small wineries recently opened in the region offer potential for further clustering to draw visitors. Support from community and agricultural organizations and county agencies contributed to a favorable environment for agritourism growth.

2. Regulatory change helps, but is not enough:

County regulations favorable to agritourism development are welcomed by farmers diversifying with agritourism activities, but are not sufficient by themselves to encourage development of agritourism operations successful enough to remain open to visitors for regular hours in a sparsely populated rural area. Keeping tasting rooms and other visitor facilities open is not cost-effective for the operations when they do not get enough visitors. Increased marketing to regional visitors could help draw attention to these operations and encourage them to remain open more often. Tourism professionals prefer to concentrate their marketing efforts on operations that are open to visitors for regular hours or larger events, causing a dilemma for newer start-up operations and limiting promotion of their occasional events and activities. Butte
County’s agritourism operators need to commit to providing regular hours of operation at their tasting rooms and farm stands, and work on honing their hospitality skills, in order to take best advantage of the increased marketing initiated by the hospitality industry. Additionally, targeted Extension support, such as the Agritourism Intensive three-session workshop series addressing key planning and operating issues, could benefit both new and existing agritourism operations. Several agritourism operators from Butte County attended these workshops in neighboring Plumas County during 2015-2016.

3. Hospitality industry financing and leadership a huge boost, with challenges:

The TBID structure is welcomed by the hospitality industry as a means to finance increased tourism marketing to draw visitors from targeted urban regions. It also provides a needed source of funding to train community hospitality ambassadors. The existence of the well-organized and professionally promoted SOFT provided the new TBID organization with ready-made assets and promotional content – leading to easy inclusion of agritourism in initial Explore Butte County marketing campaigns. However, this ease of use of existing materials excludes agritourism operations who are not members of SOFT, or who are more rural and do not have tourism industry TBID members in their communities. The TBID distributed initial zone grants proportionate to the funds contributed by hospitality industry members in each zone, which left out those rural communities with no TBID members. The TBID may find it beneficial to recognize and promote more rural agritourism assets as part of marketing the region.

4. Continued participation needed: From an external perspective, it would be beneficial for agritourism operators to track and participate in community efforts to encourage the county to: 1) provide road improvements and signage that would support their operations; 2) continue investment of some Explore Butte County funds for coordinated promotion of agritourism; and 3) reduce costly regulatory requirements for event operations that are outside the Unique Ag Overlay.

Discussion Questions

1. How do the opportunities and challenges faced by Butte County agritourism operators compare to those in your area?
2. There seems to be a Catch-22: visitor numbers are limited due to limited hours of operation, and operators cannot afford to be open more hours without increased sales. What are your suggestions for helping small-scale operators to increase visitors and sales without increasing financial obligations?
3. Funding from the Tourism Business Improvement District appears to be an asset for Butte County tourism. How might agritourism operators throughout the county better engage with them for mutual benefit (with increased promotion for all parts of the county generating more lodging stays and higher TBID revenue)?
4. What are some ideas for engaging policymakers into making changes related to road improvements, signage and costly regulatory requirements?
References


Appendix A
Extension Farm Trails Project Details

The UC Small Farm Program coordinated the 2013 *Building a Farm Trail* project and provided technical support. Grant funds were used to contract with experts to act as consultants with each group, develop websites, and design and print maps for an event in each region. At the first workshop, members of the three associations met with consultants, shared their challenges and plans, and received beginning lessons in farm trail development and agritourism marketing. The Project Manager (co-author Penny Leff), collaborators and consultants participated in a tour of each association’s region, visiting with several members of each association at their operations. Each of the three tours concluded with a stakeholders/members meeting in which the consultants facilitated a group discussion helping association members to define their geographic region and membership. Each association selected a graphic designer, gathered members’ information, drafted text, selected images and worked with the graphic designer and the Project Manager to create a farm trail map brochure for their association. Twenty thousand copies of each map brochure were printed. In addition, each group selected a website designer and worked with that designer to create or redesign a website marketing the association. (http://sfp.ucdavis.edu/events/Building_a_Farm_Trail_Project_2013_-_2015/). North Yuba Grown collaborated with other community organizations to hold the North Yuba Harvest Festival in September 2014, which had 700 attendees. During the second workshop, members of the three groups discussed challenges and successes with each other, and learned from leaders of the Apple Hill Growers’ Association and from project consultants. The third workshop was held as the *California Statewide Agritourism Summit* in April, 2015; approximately 150 members of the California agritourism community attended. SOFT’s leaders, Nicole and Jamie Johansson, were the keynote speakers. To create the farm trail association development guide, the Project Manager interviewed leaders from 20 California agritourism associations about their activities, membership, management, growth, challenges, needs and plans, and transcribed the responses. She also requested materials from each of the interviewees for the resource library to be published online. The Project Manager synthesized the interviews and information from presentations by association leaders at project workshops into a guide, *Marketing Regional Farms and Wineries: A Guide for California Agricultural Marketing Groups*. It was published online in November 2015 with the link distributed to everyone involved in California agritourism.
Appendix B
Stakeholders Interviewed for Butte County Case Study

- Glennda Morse, Morse Farms  [https://morsemandarinfarms.com/](https://morsemandarinfarms.com/)
- Monica and Michael Keller, Calolea Olive Oil  [https://calolea.com/](https://calolea.com/)
- Alyse Hickman, Hickman Family Wineyards  [https://www.hickmanfamilyvineyards.com/](https://www.hickmanfamilyvineyards.com/)
- Nicole Johansson, Sierra Oro Farm Trail  [http://www.sierraoro.org/](http://www.sierraoro.org/)
- Colleen Cecil, Butte County Farm Bureau  [http://www.buttefarmbureau.com/](http://www.buttefarmbureau.com/)
- Dan Breedon, Butte County Planning Division  [http://www.buttecounty.net/dds/planning.aspx](http://www.buttecounty.net/dds/planning.aspx)
- Casey Hatcher, Butte County Economic and Community Development  [http://www.buttecounty.net/economicdevelopment/CommunityDevelopment.aspx](http://www.buttecounty.net/economicdevelopment/CommunityDevelopment.aspx)
- Sandy Linville and Wilma Compton, Oroville Area Chamber of Commerce  [https://www.orovillechamber.com/](https://www.orovillechamber.com/)
- Carolyn Denero, Explore Butte County  [https://www.explorebuttecounty.com/](https://www.explorebuttecounty.com/)
- Carl Ribuado, SMG Consulting  [http://smgonline.net/](http://smgonline.net/)
Authors

Shermain Hardesty, Ph.D., Extension Economist Emerita, Department of Agricultural and Resource Economics, University of California-Davis. 530-752-0467 shermain@primal.ucdavis.edu

During the 10 years prior to her retirement in July, 2017, Shermain directed the University of California’s Small Farm Program. Her research and extension activities focused primarily on local foods marketing, agritourism, values-based supply chains, food safety, and identification of new marketing and specialty crop opportunities for smaller-scale farmers. She also served as Director of University of California’s Center for Cooperatives. Shermain co-authored two books, *Growing Local—Case Studies on Local Food Supply Chains* and *Cooperative Conversions, Failures and Restructurings: Case Studies and Lessons from U.S and Canadian Agriculture*. Along with multi-state collaborators, she recently completed *five factsheets* regarding expanding small and medium-sized farms’ participation in the specialty food industry.

Penny Leff, Agritourism Coordinator, University of California Sustainable Agriculture Research and Education Program 530-752-5208 paleff@ucdavis.edu

Penny has been statewide Agritourism Coordinator with University of California Cooperative Extension (UCCE) since 2009, first as part of the Small Farm Program and currently as part of the UC SAREP Food and Society Program. In this position, she works with UCCE academics and staff to develop resources and connections for everyone involved in California agritourism. She maintains the UC Agritourism Directory and Calendar, organizes agritourism workshops, summits, webinars and classes throughout California, and participates in research projects relating to agritourism development. She also works with producer associations and communities on collaborative agritourism development and marketing. Penny has more than 20 years’ experience supporting small and mid-scale farmers, including work as Program Manager for the Berkeley Farmers’ Markets and with farmers’ market managers around the state implementing systems for EBT SNAP access at farmers’ markets.
Holly George, Emeritus University of California Cooperative Extension
Plumas-Sierra counties, hageorge@ucanr.edu

Holly worked for 33 years as a Livestock, Natural Resources and Community
Development Advisor for Cooperative Extension, initially in Alameda and
Contra Costa Counties in the East Bay before transferring to Plumas and
Sierra in rural northeastern California. She co-authored *Agritourism and
Nature Tourism in California*, University of California ANR publication 3484,
along with several factsheets used at Agtourism workshops across the
country. She has a long history of working with diverse interests (Art, Ag,
Local Food, Recreation, etc.) to strengthen community vitality and continues
to act as a network weaver. She has helped organize and facilitate diverse
efforts to amplify rural voices and ag/art/stewardship events.
Chapter Summary

Rural communities that are dependent on manufacturing, mining, energy, and timber are witnessing population declines while amenity-rich communities are growing, particularly those with a desirable physical environment and a positive small town atmosphere. This trend is apparent in communities in Vermont with access to high quality outdoor recreation. Rural communities that have successfully branded themselves as hubs for nature-based tourism have much to share with communities seeking to develop their economies around outdoor recreation.

The northeastern corner of Vermont, known as the Northeast Kingdom, is the most rural part of the state. During the past few decades, declines in the regional forestry and paper industries have resulted in the highest unemployment and poverty rates in the state. However, the natural environment provides opportunities to capitalize on outdoor recreation for community and economic development.

In the early 1990’s, the Northeast Kingdom town of East Burke, Vermont was suffering economically. Burke Mountain, a ski area, brought in tourists during the winter, but the community needed additional income during the other seasons. The community decided to try a novel approach to tourism development at that time: mountain biking.

Kingdom Trail Association (KTA), a 501(c)3 non-profit organization, was established in 1994 by a group of visionary residents and business leaders in the area. Their goal was “to encourage recreational use of the Northeast Kingdom that is ecologically sensitive and promotes the natural beauty of the region.” Working with private landowners, KTA developed a trail system connecting private lands with year-round recreational opportunities, which has grown to include mountain biking, fat biking, hiking, running, Nordic skiing, and snowshoeing.

In 2016, KTA took part in an economic and fiscal impact assessment of four trail systems in Vermont which estimated a total of nearly $8 million in direct expenditures annually as a result of KTA visits, including lodging, food and drink, gifts/souvenirs, transportation, admission fees, and equipment (See Appendix for additional detail). These expenditures are centered on East Burke’s downtown area, but the impacts are distributed throughout the region and have had positive benefits in nearby towns.
Kingdom Trail Association demonstrates that outdoor recreation opportunities have the potential to transform a downtown, an economy, and a community. This experience can serve as a case study with important implications for communities interested in developing recreation economies.

Learning Objectives:

1. Recognize key community characteristics that lead to successful recreation hubs.
2. Utilize the KTA model to explore expanded public use of private lands in other regions.
3. Identify a range of recreational opportunities that can stimulate rural economies.
4. Assess the benefits and challenges that increased outdoor recreation bring to communities.
5. Discuss sustainable use of human and natural resources to enhance local economies.

The Issue, Opportunity or Trend

Nature-based tourism and outdoor recreation are growing segments of the tourism industry worldwide (Nyaupune et al., 2004) and a major contributor to the economy of the U.S. According to the Outdoor Industry Association (OIA), outdoor recreation is responsible for $887 billion in annual U.S. consumer spending, it supports 7.6 million jobs across the country and generates $125 billion in federal, state and local tax revenue each year (OIA, 2017). The U.S. Department of Commerce’s Bureau of Economic Analysis (BEA) estimates that the outdoor recreation economy accounted for 2.2 percent of current-dollar GDP in 2016. The outdoor recreation economy grew 1.7 percent in 2016, faster than growth for the overall U.S. economy (BEA, 2018).

National studies of outdoor recreation suggest interest and participation is on the rise, with certain activities such as mountain biking, kayaking, and viewing wildlife increasing while others such as hunting and fishing remaining stable or declining in some cases (Cordell et al., 2008). Almost half (49%) of the US population ages 6 and over participated in an outdoor activity at least once in 2017 (OIA, 2018). Biking (including road biking, mountain biking, and BMX) is the third most popular outdoor activity by participation, involving 16% of the U.S. population (47.5 million people). Biking is close behind the top two activities, running and fishing, which have participation rates of 19% and 17% respectively. For youth ages 6-17, biking is the most popular outdoor activity by participation, attracting 24% of U.S. youth (12.5 million people) in 2017 (OIA, 2018).
Recreation trails are often a key pathway for the development of outdoor recreation. They represent an emerging approach to tourism development throughout the world, as nature-based recreation is viewed as a source of jobs and income that creates few public and environmental burdens. While hiking trails such as the Inca Trail in Peru and the Appalachian Trail in the Eastern United States have attracted tourists for decades, other types of trails have been developed more recently, such as the Great Texas Coastal Birding Trail, the Northern Forest Canoe Trail, and the Vermont Forest Heritage Trail.

In many communities, trail networks are important amenities, serving both as destinations for visitors and as tools for attracting new residents and businesses. Across the U.S., communities predominantly dependent on manufacturing, mining, energy, and timber are witnessing population declines while towns with established trail systems and other recreational assets appear to be more resilient (White and Hanink, 2004). Trails often traverse regions facing significant economic challenges due to fundamental shifts in traditional rural industries. While trends are complex and multi-layered, it is increasingly recognized that recreation-based tourism can play an important role in the economic recovery of economically depressed regions by attracting visitors. This revenue can maintain the profitability of businesses in a time when many services in rural areas are increasingly centralized (Blakely and Bradshaw, 2002).

Research suggests that trails are the number one amenity influencing homebuyers aged 55 and older, which is the country’s fastest growing demographic and the one most able to relocate and invest in a new home (Anderson, 2011). Nature-based tourism and trail networks appear to be an effective tool to encourage small business development and local entrepreneurship. Trails help attract visitors who then patronize local restaurants, motels, gas stations, and other businesses. Their expenditures can lead to additional job opportunities in the community and can maintain the profitability of local retail stores in a time when rural businesses are being increasingly consolidated.

On a regional basis, the cumulative economic effects of visitors can have be significant, particularly in small, rural communities (Bowker et al., 2004). By diversifying the local economic base, recreation development can help stabilize economic conditions in communities previously reliant on single industries (Blakely and Bradshaw, 2002). Trail managers have an important role in helping to open new markets and encourage local entrepreneurs. For example, a study of the Northern Forest Canoe Trail in northern New York, Vermont, New Hampshire, and Maine found that approximately 90,000 visitors paddled the waterways in six study areas. Their spending in remote communities created $12 million in total economic impacts and supported about 280 jobs (Pollock et al., 2011). Trails can provide a focal point for the strategic planning, marketing, and management necessary for sustainable tourism development of a regional destination. Furthermore, they provide a useful framework for engaging area community members and businesses, as well as state and local government agencies in the sustainable development, management and marketing of visitor amenities in the region (Wray et al., 2010).

There is an important link between the economic vitality of a community and local opportunities for residents to enjoy and preserve their natural resources. In a study assessing differences in social variables between “recreation and non-recreation” counties, researchers found that communities with access to outdoor recreation have lower poverty rates, are healthier, and are more highly educated (Johnson, 2002). In addition to offering recreational opportunities in safe and easily-accessed locations, trails build social capital and connect people to place by giving them opportunities to improve the resource (NYCPA, 2001). Studies
suggest that communities with outdoor recreation amenities have lower crime rates and higher community cohesion (Kondo et al., 2016; Weinstein et al., 2015). Stewardship initiatives developed around trail systems offer residents and local businesses opportunities to collaborate and improve their community (Anderson et al., 1999). These findings hold true in the Northern Forest region of the U.S. where a study of mediated modeling concluded that quality of life for residents is a central variable closely connected with environmental amenities and economic factors (Chase et al., 2010).

Numerous recent reports and articles seek to evaluate the economic impacts and opportunities mountain biking offers, both nationally and internationally. (Maples & Bradley, 2017; Hunt, 2017; Cox, Drew, & Dixon, 2018; WCMBTA, 2015; Burgin & Hardiman, 2014.) Recognizing the importance of outdoor recreation and trails for residents and visitors alike, Kingdom Trail Association (KTA) formed nearly 25 years ago. KTA was an early adopter of outdoor recreation as a means to support a rural Vermont community with rich natural amenities and poor job opportunities. It serves as an excellent case study for other communities considering further development of their recreational resources.

Figure 3: Kingdom Trail Association attracts guests throughout the year, helping to fill gaps in a local tourism economy largely driven by summer and winter visitors.
The Innovation
Case Context

Vermont’s Northeast Kingdom (NEK) consists of three Vermont counties: Essex, Orleans and Caledonia. As the name suggests, these counties are in the northeast corner of the state, bordering Quebec to the north and New Hampshire to the east. The NEK is home to about 64,500 residents, or about 10% of Vermont’s population. The NEK’s counties are among the least populous and lowest density (people per square mile) counties in Vermont, and they are experiencing population loss, like much of the state. These counties have the lowest labor force participation rates in Vermont and relatively high unemployment (VT State Data Center, 2018).

Kingdom Trail Association currently operates in the four contiguous towns of East Haven, Kirby, Burke, and Lyndon, Vermont. Burke, Kirby, and Lyndon fall within Caledonia County and East Haven is within Essex County. Historically, the regional economy has been land-based, with agriculture and timber enterprises serving as the primary industries. As these industries have changed over time, employment opportunities have also changed, and many residents now travel to other population centers for work. Although generally quite rural, the area is served by Interstate 91, which travels from Connecticut north to Quebec. KTA is a 2.5 hour drive from Montreal (metro population of ~ 4.1 million) and a 3 hour drive from Boston, MA (metro population of ~4.6 million). KTA’s world class trails and its relative proximity to these large population centers are key to its continued success.

Table 1: KTA Town Profiles*

<table>
<thead>
<tr>
<th>Town</th>
<th>County</th>
<th>Population</th>
<th>Area</th>
<th>Median Income</th>
<th>Household Income</th>
<th>Individuals below poverty level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burke</td>
<td>Caledonia</td>
<td>1501</td>
<td>34.02 mi²</td>
<td>$48,148</td>
<td></td>
<td>12.4%</td>
</tr>
<tr>
<td>East Haven</td>
<td>Essex</td>
<td>300</td>
<td>37.4 mi²</td>
<td>$40,750</td>
<td></td>
<td>15.3%</td>
</tr>
<tr>
<td>Kirby</td>
<td>Caledonia</td>
<td>467</td>
<td>24.4 mi²</td>
<td>$61,250</td>
<td></td>
<td>7.7%</td>
</tr>
<tr>
<td>Lyndon</td>
<td>Caledonia</td>
<td>5911</td>
<td>39.81 mi²</td>
<td>$40,270</td>
<td></td>
<td>21.2%</td>
</tr>
</tbody>
</table>

*2012-2016 American Community Survey 5-Year Estimates.
The landscape in the region is characterized by rolling hills, rising mountains, pristine lakes, thick forests, lush pastures and meandering streams. The NEK is roughly at the 45th parallel and sees strong seasonal variations in weather and tourism. Winters are long and cold, offering a four-month window (December-March) for the ski industry. With the help of efficient snowmaking technology, many Vermont ski resorts stretch the season from November to April or beyond. Summer and fall (June into October) offer about five months of warm and moderate temperatures ideal for road and mountain biking, hiking, and water activities, amongst other recreational pursuits. April, May, October and November are often referred to as Vermont’s “shoulder seasons”, or “stick season” in fall, and “mud season” in spring. For recreation enterprises, this is a time of rest, planning, and recuperation, and also a time when business slows or comes to a complete stop.

Finally, in discussing the context for this case study, it is important to note the strong civic culture that exists in Vermont communities. Municipalities still hold town-wide open meetings each spring, where all residents may come to discuss budget and municipal concerns. Most fire departments are volunteer-run, and many towns do not have their own police force. In short, people must come together to make things happen. While rural life may have some disadvantages, it offers many opportunities to be involved and make a difference at a local level, through the local emergency rescue organization, a fire department, a recreation committee, or the town select board or city council. A community-minded approach, entrepreneurial spirit, and landowners willing to open their private land to public use have opened the door to an array of creative partnerships and solutions that bolsters KTA’s success.

Stakeholders Involved

Local residents and business owners served as the primary stakeholders in the earliest visions of KTA, investing time, energy, and resources to develop the local ski hill (now Burke Mountain Resort), local cross country ski

Figure 5: Kingdom Trail Association exists due to the generosity of local landowners who agree to host public trails on their open lands.
trails, local inns, and connections between all three. Through a series of owners, Burke Mountain was continued its evolution from a one lift operation opened in the 1950s, to a larger and more regional attraction with a new baselodge, new chairlifts and snowmaking. In addition, Burke Mountain Academy was emerging as one of the nation’s premier ski academies, attracting the country’s best up-and-coming alpine and Nordic ski racers. Local inns began providing upscale lodging, allowing the area to serve a more diverse set of users. These inns were in need of four-season clientele, Burke Mountain was looking to expand its seasonal base, interest in cross country skiing continued to grow, and mountain biking began to take hold. These early stakeholders envisioned connecting the inns, the village of East Burke, and the mountain via trail, to support and grow recreational opportunities, and the local economy.

Figure 6: KTA Historical Timeline

**Year: Activity**

1989: Area citizens begin riding mountain bikes on local Nordic ski trails.
1991: Within a few years, riders from other areas are arriving to do the same thing.
1993: Residents begin asking landowners and businesses for permission to ride on private land.
1994: KTA chartered, applied for non-profit status.
1998: First map printed and sold through local sports store ($3/map). Trail users must purchase for access.
1999: First intern, with small stipend, helps with administration, marketing, and outreach.
2000: Through ongoing requests for permission, trail network reaches 50 miles, all work done by volunteers.
2001: First concerted publicity campaign, begin applying for small grants, still sell map ($5) for access.
2002: KTA hires a half-time director, maintains a summer intern. Sells season ($20) and day memberships ($5).
2004: Hires full-time Executive Director and establishes office.
2004: Increases membership options and rates, hires summer staff for membership sales and trail work, fundraising concert.
2005: Hire full-time program manager, increase summer staffing, create trail patrol, purchase trail work vehicle, establish partnership with local xc ski businesses, where KTA does their winter Nordic trail grooming.
2007: Board develops 5-year strategic plan, conducts a survey, increases role with winter grooming, improves welcome center.
2009: Named “Best Trail Network in North America,” by Bike Magazine. 3 full-time year round staff.
2011: Hired full-time operations manager, annual visitation reaches 50,000
2012: 60,000 visits recorded. Host NEMBAFEST, attracts 1400 people. First Winterbike event.
2013: Begin managing trails for fatbiking in winter. Increasing number of fundraising events and races at KTA.
2014: NEMBAFEST brings 2800, visitation reaches 72,000.
2015: NEMBAFEST brings 3400, KTA raises $300,000 in 5 weeks to conserve land for trails. Tiki bar, food truck, and public restrooms established at welcome center. Visitation = 80,000. Four full-time staff, 22 seasonal.
2016: Visititation = 94,000.
2017: Strategic Planning Process. Community invited to be part of creating 3-year strategic plan, involved in creating Executive Director position description, and Executive Director interview process.
2018: KTA Hires New Executive Director, Staff of 4 full-time, 27+ seasonal, 9 member board of directors, 90+ private landowners.
An informal group began meeting to work toward this vision. It was a diverse group of individuals, each of whom had his or her own interest, but all were committed to the area and its success. Nordic and Alpine skiers, business owners, attorneys, timber professionals, horseback riders, mountain bikers, teachers, a local state representative, and the managers of Burke Mountain Ski area and Burke Mountain Cross Country ski area were all involved. Figure 5 provides a brief historical timeline for context. It wasn’t long before the NEK group hired a trail designer and the first trails connecting the village of East Burke to Burke Mountain Resort were created, setting the stage for more recreational trails.

As the vision continued to evolve, the range of stakeholders expanded, with local landowners and local businesses always at the heart of the endeavor. Other key stakeholders (Table 2) include private foundations and philanthropists, public sector partners, conservation organizations, and business associations. Today, 92 landowners host publicly accessible trails that are part of the KTA system, and local businesses continue to emerge to meet the needs of visitors.

Table 2: Key KTA Stakeholders and Roles

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Primary Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burke Area Chamber of Commerce</td>
<td>Business and Economic Development</td>
</tr>
<tr>
<td>Connecticut River Valley Partnership Program</td>
<td>Financial Support, Technical Assistance</td>
</tr>
<tr>
<td>National Park Service</td>
<td>Technical Assistance</td>
</tr>
<tr>
<td>Vermont Department of Forest, Parks and Recreation</td>
<td>Financial Support, Technical Assistance</td>
</tr>
<tr>
<td>Vermont Community Foundation</td>
<td>Financial Support</td>
</tr>
<tr>
<td>Vermont Housing and Conservation Board</td>
<td>Technical Assistance, Conservation, Land Management</td>
</tr>
<tr>
<td>Vermont Land Trust</td>
<td>Technical Assistance, Conservation, Land Management</td>
</tr>
<tr>
<td>The Windham Foundation</td>
<td>Financial Support</td>
</tr>
</tbody>
</table>

Approach Used and the Impact

Key models and processes in the development and continued operation of Kingdom Trail Association are presented below. The lines between these processes often blur and the approaches presented here are often overlapping and complementary in nature.

1. Public Trails on Privately Held Lands

KTA is a world class trail system built on privately held lands, with trails traversing lands owned by 92 unique landowners in four adjacent towns. The organization is dependent on private landowners who embrace the organization’s vision and are dedicated to it. Although this model is not necessarily new or unique, it is
arguably more difficult to accomplish with each passing year, as more lands are subdivided, or otherwise encumbered. And unlike western US states, where large swaths of public land are often available for trail development, Vermont is a patchwork of private lands. Connecting those lands with sustainable trails is a slow and delicate process of building and maintaining positive relationships. In support of its landowners, KTA hosts an annual appreciation event. Approximately 200 people attended a recent event, held at the Inn at Mountain View, an Inn still operated by the owners who helped launch KTA in its earliest day. KTA works hard to convey its appreciation to its trail hosts on a day to day basis, and also provides an annual dinner with gift bags filled by local businesses, live music, and more. KTA staff report that people now buy property near or within the network because of KTA and are eager to host and access trails.

2. Creating a Demand for Services, and Filling the Gaps in a Seasonal Tourist Economy

Local business people have and continue to play a strong role in the success of KTA. The original grassroots effort to create the trail network was in some senses born of necessity. Local businesses needed year-round clientele, and saw an opportunity through recreational trails. Residents were cross-country skiing and mountain biking on existing trails and logging roads, sometimes without permission, and as more and more people engaged in these activities, business owners saw an opportunity. Perhaps they could harness this energy to build their community and their business. Community members recount that in the first few years after the establishment of KTA, many of the visitors stayed overnight at inexpensive campgrounds and did not spend much money at restaurants and other establishments in East Burke. However, over time, the number of visitors grew and accommodations, restaurants, and other tourism amenities also evolved, bringing in mountain bikers of all ages and income levels.

Today, the area offers a wide range of activities to visitors throughout the year, from hiking, mountain biking, and trail running to alpine skiing, cross-country skiing, and fat-biking in winter. With the region’s largest groomed fat-bike trail network, KTA can offer riding nearly year-round now. (The trails currently close for hunting season in November, reopen when winter conditions allow grooming, and close again for a period in the spring to prevent damage when soils are wet from snow melt and spring rains.) Access to this array of recreational activities supports a wide range of local enterprises, from year-round food and lodging establishments to seasonal post-ride tiki bars and food trucks.

Figure 7 Professional and volunteer trail crews help create and maintain KTA’s growing trail network
3. Partnerships for Success
While the growth of the trail network and the local economy has been a largely positive and collaborative effort, a booming tourism industry in a small village or town also has unintended consequences. Trails and the charm of the Northeast Kingdom bring people to KTA, yet the local infrastructure is limited in its capacity to handle increased visitation. KTA is conscious of its growth and its impacts on the community, and works diligently to grow responsibly. The organization communicates directly with local businesses and landowners to make sure parking is managed responsibly, and that trail users are not infringing on local businesses and residences. KTA works collaboratively with the businesses and landowners to solve issues that do arise through proper signage, and via paid KTA ambassadors who facilitate parking and relay proper information to trail users. KTA is also working with town on traffic congestion and safety issues. In a recent collaboration, the Town of Burke and KTA were awarded a $438,426 Northern Borders Regional Commission grant to rehabilitate a roadway, improve drainage, and purchase land parallel to the road to create an alternative route for bikes. It is not feasible or appropriate for KTA take on a public roadway construction project on its own, but can do so as part of a collaborative effort. This partnership approach is used repeatedly to work through the challenges that growth presents.

4. Community Engagement, Education, and Outreach
KTA understands the importance of community engagement and is working to bolster its education and outreach. Table 3 highlights activities that are part of this ongoing process.

Table 3: Community Engagement, Education, and Outreach

<table>
<thead>
<tr>
<th>Trail Advisory Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>This long-standing KTA committee is stacked with community members: foresters, teachers, former trail crew participants, engineers, medical professionals, and more. Such committees bring a wealth of knowledge, perspective, and experience to projects, ensuring plans are well-vetted and implemented.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ambassador Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>KTA Ambassadors ride trails with maps and provide directions and guidance to trail users. They are stationed at intersections on trails, and assist with parking every weekend.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Educating Trail Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>For the most part, residents and landowners are supportive of visiting riders and cross-country skiers. However, there is still a sense that some people think it is their right to be on the trails, rather than a privilege. KTA is developing its educational resources to help riders understand what a truly special community they are in, and that it is a privilege to ride the trails.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategic Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>In 2017, the community was invited to be part of creating a 3-year strategic plan and they were also involved in creating the Executive Director position description, and the interview process in 2017.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>KTA AmeriCorps: Educational Outreach Coordinator</th>
</tr>
</thead>
<tbody>
<tr>
<td>This KTA AmeriCorps member is responsible for creating, planning, and producing outdoor STEM education programming and educational events for youth in the local community and in area schools. The member produces educational outreach social media posts, creates trail signage to provide educational information to NEK area participants, coordinates local volunteers, and aids in planning and execution of educational aspects of KTA events.</td>
</tr>
</tbody>
</table>
Implications & Lessons learned

The implications and lessons learned from Kingdom Trail Association are far-reaching and relevant at a variety of scales, ranging from the management of trails and infrastructure to the management of community relations and a focus on developing economic opportunities for the surrounding towns.

KTA reports that many of the lessons for trail managers are related to infrastructure planning, construction and maintenance. Specifically, making sure that adequate parking and bathrooms are available for trail users is critical. Siting welcome centers and other central meeting spots requires coordination with town officials to ensure that these structure are in keeping with community regulations and do not cause traffic congestion and safety concerns. Related to this, educating trail users is an important part of KTA’s ongoing responsibilities and an area that needs consistent investment and attention. The need to educate trail users is essential in sustaining the terrain physically, and also in sustaining the relationships that support the trail network. KTA has learned that visitors need reminders regarding respectful behaviors and attitudes when using the trails, and when interacting with local residents and businesses. Encouraging visitors to support local businesses creates a virtuous cycle where community residents are then more supportive of development that is in keeping with their sustainable tourism goals. At the time of writing, KTA was actively applying for funding to complete a feasibility study on the entire trail network. The proposed study will include economic impact, will consider the physical impact to the communities that host the trails, and will provide recommendations on potential future expansion, welcome center locations, and parking locations.

While specific decisions about infrastructure development and trail maintenance will vary from community to community, below are lessons learned that apply to many contexts where economies based on outdoor recreation are advancing in harmony with sustainable development.
• Coalition building: Collaborations are important, including support from local residents and businesses combined with investment from external partners.
• Knowing the trail users and customers: On the community and the business level, knowing the target market is key. What do your customers need? How are your communities and businesses catering to these users?
• Locating trails near downtowns: Connecting trails with downtowns and local businesses is critical for stimulating economic growth. Having trails in remote areas may not result in increased tourism dollars spent at local businesses.
• Understanding economic impacts: Tracking economic impacts and maximizing their benefits for local residents can lead to increased support for recreation economies.
• Planning for long-term sustainability: Leaders must be able to navigate the local and institutional politics and develop structures and policies that will stand the test of time and changes in leadership.

Today, Kingdom Trail Association is hailed as a success story, bringing in almost $8 million annually to nearby small towns in rural areas with limited economic opportunities. Developing a trail system on the scale of KTA’s with broad appeal may seem difficult to replicate for struggling communities. However, it is important to remember that many residents in nearby towns were initially skeptical about the idea of creating a destination for mountain biking when it was first mentioned in the early 1990’s.

By building coalitions, knowing their target markets, and connecting trails with downtowns and local businesses, KTA was able to create a world-class destination for mountain biking and compatible trail uses. Understanding the economic impacts and planning for long-term sustainability came later, as KTA amassed resources and expanded on its responsibilities to engage with communities. Current successes notwithstanding, KTA continues to develop its trail network, improve visitor experiences and education, strengthen community relations, and increase economic impacts throughout the region. The lessons learned are changing over time, as recreation trends shift and the organization and destination mature. KTA and partners are continually reassessing, but they remain committed to sharing their knowledge and experiences with other communities interested in recreation economies and sustainable tourism.

Discussion Questions

1. What characteristics lead to community success when a small town looks to outdoor recreation to boost its economy?
2. Could the KTA model of public use of private lands work in other regions? Are there already examples? Where are the challenges and opportunities in your community?
3. Does your community have access to public lands that are rich with outdoor opportunities? Are there new ways they could be leveraged to support the local economy? Think broadly of recreation - it doesn’t need to be action sports (wildlife viewing, bird watching, fishing, etc.)
4. Thinking broadly, what benefits and challenges does increased outdoor recreation bring to communities?
5. Do the benefits noted in response to #4 above extend to all community members, and if not, how can we work toward that goal?
References


U.S. Department of Commerce’s Bureau of Economic Analysis (BEA)


Appendix

Kingdom Trail Association (KTA) Annual Economic Impact (VT Trails and Greenways Council, 2016)

$7,945,524 in direct expenditures*

94,000 trail user-days

75% of the trail users were from outside of Vermont.

97% of non-resident visitors indicated that they had traveled to Vermont because of KTA.

Visitors stayed in Vermont for an average of 2.76 days.

Average spending per group for overnight visitors was $1,317 (group size average = 4 people)

Average spending per group for day visitors was $376 (group size average = 3 people)

Average spending per person for day visitors was $115.

*The estimate of $7.9 million per year in direct economic impacts was reported to be conservative, as it included only “net new spending.” It also did not include indirect and induced impacts, which can be substantial.
Authors

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Abby Long
Abby Long is the Executive Director of the Kingdom Trail Association. With her passion for outdoor recreation and abiding interest in the health and well-being of her community, she envisions a commitment to providing a safe, inspiring trail network to elevate the economic, social, cultural, and environmental vitality of the beautiful Northeast Kingdom of Vermont. Abby considers herself fortunate that she has had the opportunity to live and work in a number of different environments. She has served all over the world; teaching in rural China, Southeast Asia, the Blackfeet Indian Reservation, and Belize, and on the Gulf Coast on restoration efforts through AmeriCorps post-Katrina. She holds a B.A. in Public & Community Service from Providence College in Rhode Island and a Master’s Degree in Intercultural Service, Leadership & Management from the School for International Training Graduate Institute in Vermont. As the past Executive Director for the Leadville Trail 100 Legacy Foundation and Athlete Service Manager for the Leadville Race Series in Colorado, Abby brings administrative, fundraising, capacity building, and program design & implementation experience in the non-profit sector, plus extensive knowledge of the ultra-running and mountain bike race industry.
http://kingdomtrails.org/
Kentucky Trail Town Program: Facilitating communities capitalizing on adventure tourism for community and economic development

Jayoung Koo, University of Kentucky, United States of America

Chapter Summary

Since 2012, the state-wide Kentucky Trail Town program has been guiding Kentucky communities located in geographically advantageous areas to capitalize on adventure tourism through a systematic trail-based community and economic development approach. The Kentucky Department of Tourism, Office of Adventure Tourism facilitates proactive communities through a sequence of topical assessments and capacity building followed by a trail-oriented trial event as part of the community-based initiative. The Kentucky Trail Town program integrates trail planning and development efforts with a downtown revitalization approach for small or rural towns to strengthen the synergy between them. Ultimately, Kentucky Trail Towns create an action plan with a set of target goals for accomplishing longer-term economic development. Once certified, Kentucky Trail Towns are responsible for continuing their efforts as a quality Trail Town with emphasis on sustainable tourism practices serving the needs of adventure tourists, trail users and residents. As of 2017, 17 certified Kentucky Trail Towns are accommodating and serving trail users on a range of established and developing trail systems and continuing their efforts toward sustainable trail-based tourism destinations. Extension educators have partnered with and served essential roles during the local efforts in several Kentucky Trail Towns.

Learning Objectives:

1. Describe the background, approach, and process of the state-wide Kentucky Trail Town program
2. Identify the similarities and differences of Trail Town programs and initiatives
3. Discuss the strengths, weaknesses, limitations, and further opportunities of the Kentucky Trail Town program and what aspects could be applied to communities elsewhere and their tourism development practices
The Issue, Opportunity or Trend

Trails, trail systems, and greenway development have increased over the last 30 years regardless of their context whether in urban, suburban or rural areas. Trails are highly valuable assets and trail development and use studies have evidenced economical, environmental, social, and health-related benefits (NPS, 2008; Bowker, Bergstrom & Gill, 2007; Corning, Mowatt, & Chancellor, 2012; Gallagher & Camp, 2011; Outdoor Recreation Association, 2017; Schasberger et al., 2009). Numerous resources and technical assistance are offered by organizations and agencies specializing in trail development and implementation. Furthermore, trail-oriented development (TrOD) efforts utilize trail related infrastructure and programs supportive of active alternative travel and recreation activities where communities can capitalize on trail-based economic development (ULI, 2016; Moreno-Long, 2017).

The concept of “trail town” is an ideal approach for holistically addressing a range of recreational tourists’ and host communities’ needs which has been naturally developed in small towns or rural areas since the 1980s. The interest and success of development around trails has been increasing even in small or rural towns near major bicycling routes and hiking trails such as in Appalachian communities in the U.S. For example, the small, rural town of Damascus, VA, steadily transformed itself since the early 1980s into a natural trail town through a grass-roots approach. Damascus benefits economically from tourist expenditures related to the 34-mile Virginia Creeper Trail which connects Abingdon and Whitetop Station, VA, at its intersection with the Appalachian Trail among others and is now a Trail Town, USA community through the Appalachian Trail Program™ (Appalachian Trail Conservancy, 2016; Bowker, Bergstrom & Gill, 2007). More formally, the “trail town” concept has been widely promoted since the early 2000s as a program by The Progress Fund through their collaboration with the Allegheny Trail Alliance (ATA) by promoting bicycling-based tourism experiences for economic development endeavors further north in the Appalachian regions of western Pennsylvania and Maryland (Gallagher & Camp, 2011; The Progress Fund, 2015a) (Table 1).

1. Table 1. Example of informal and formal Trail Town development efforts in the U.S.

<table>
<thead>
<tr>
<th>Where</th>
<th>Informal Appalachian Trail Community</th>
<th>Formal Trail Town Program®</th>
</tr>
</thead>
<tbody>
<tr>
<td>Damascus, VA</td>
<td>Town of Damascus, VA and the Appalachian Trail Conservancy</td>
<td>The Progress Fund and the Allegheny Trail Alliance (ATA)</td>
</tr>
<tr>
<td>When</td>
<td>Since the early 1980s</td>
<td>Since the early 2000s</td>
</tr>
<tr>
<td>Major Trails</td>
<td>-Virginia Creeper Trail</td>
<td>-The Great Allegheny Passage (150-mile) built on abandoned rail lines from Cumberland, MD to Homestead, PA</td>
</tr>
<tr>
<td></td>
<td>-Appalachian Trail</td>
<td>-Four other major trails</td>
</tr>
<tr>
<td></td>
<td>-Five other major trails in proximity</td>
<td></td>
</tr>
<tr>
<td>Accomplishments</td>
<td>-Tourism focused activities and businesses since the 1990s</td>
<td>-Trail Town Manual (2005)</td>
</tr>
<tr>
<td></td>
<td>-Trail Days community event</td>
<td>-First Trail Town Program® (2007)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>-As of 2015: Total of 21 towns</td>
</tr>
</tbody>
</table>

(Sources: Bowker, Bergstrom & Gill, 2007; Gallagher & Camp, 2011; The Progress Fund, 2015a and 2015b; Appalachian Trail Conservancy, 2016; Damascus Planning Commission, 2013)
Currently, there are a number of trail town initiatives led by various entities, often non-profit or local organizations with a focus on economic development such as The Progress Fund, Appalachian Trail Conservancy, Land Information Access Association (LIAA), and North Country Trail Association. While the economic growth of trail towns is important, trail development initiatives should be grounded in sustainable community-based tourism efforts in communities and regions to reduce economic leakage, and not be driven by the tourism industry itself or potentially by outsiders. As theorized in ecotourism and other environmentally and culturally sensitive tourism practices, commitment to social justice, equity, and empowerment of the host community are crucial for the long-term success of a community’s sustainability (Blackstock, 2005; Fritsch, & Johannsen, 2004). Furthermore, communities relying on outside tourism entities and events need to be prepared for the potential relocation of such entities (Scott, McSpirit, & Foley, 2017). Therefore, communities should consider a balanced approach for both trail users, adventure tourists, and their residents for an enduring tourism economy especially in small or rural towns.

The Innovation

Case Context

The state of Kentucky is located at the northern edge of the southern region of the U.S. and is primarily rural even though more than half of the state’s population is concentrated around five major urban areas. Kentucky communities, historically, were established close to natural resources, such as forests and rivers. However, in a vastly global economy, many rural Kentucky communities have experienced decline due to changing economies, limited employment opportunities in relevant sectors, and lack of diversified economies despite overall economic growth at the state level. In many cases, communities located farther away from economic and cultural centers are continuing to struggle to secure businesses and jobs, prevent further population loss, and overcome health epidemics (Bailey, 2018; Davis, 2009; Fritsch & Johannsen, 2004; Kingsolver, 2018). Additionally, cultural activities are continuously converging around urban centers and along major corridors where services and resources are convenient to access, thus further decreasing economic activities in small towns.

Fortunately, the state of Kentucky is a destination for numerous types of adventure tourism activities in a variety of geographic locations. The state identifies seven tourism regions to explore that represent a range of natural and cultural characteristics and geologic structures with a mix of recreational activity opportunities (Kentucky Department of Travel and Tourism, 2016 and 2017) that many small and rural Kentucky towns have the potential to capitalize on for economic promise, especially through the tourism sector. The Office of Adventure Tourism (OAT) in the Kentucky Department of Tourism (formerly the Kentucky Department of Travel and Tourism) initiated the Kentucky Trail Town program in 2012 with a goal to guide communities on how to take advantage of trail-based adventure tourism for community and economic development purposes. The program defines a “trail town” as a safe, friendly, and vibrant destination along a long-distance trail or near an extensive trail system which offers opportunities for trail users to explore culture and heritage while experiencing hospitality (OAT, 2012a). The state-led program is based on best practices of adventure tourism, ecotourism, and geotourism, which theoretically ensure resilient environments, attract customers, support
local economies, and encourage sustainable practices for expanded outdoor adventure recreation or travel as a component of nature-based tourism while protecting and managing the destinations and distinctive places with enlightened stewardship (Fritsch & Johannsen, 2004; Weber, 2001; WTO, 2014; OAT, 2014). Adventure tourism in the state of Kentucky provides a range of outdoor recreational activities (Table 2) that are centered on existing trail(s) and trail networks for potential Trail Towns. Ultimately, the Kentucky Trail Town program aims to facilitate potential gateway communities to benefit from increased tourism activities near major trail resources while setting the stage for healthy communities through a trail-based approach while complementing the state’s effort for expanding and specifying connectivity across a state-wide trail network (Table 3) (OAT & BGADD, 2012; OAT, 2012a and 2014; KYDLG, 2014).

2. Table 2. Types of adventure tourism activities in Kentucky

<table>
<thead>
<tr>
<th>Trail Blazing</th>
<th>Adventures in Altitude</th>
<th>Water Adventure</th>
<th>Wildlife</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiking</td>
<td>Caving</td>
<td>Fishing</td>
<td>Viewing</td>
</tr>
<tr>
<td>Biking</td>
<td>Rock Climbing</td>
<td>Boating</td>
<td>Hunting</td>
</tr>
<tr>
<td>Horseback Riding</td>
<td>Zip Lining</td>
<td>Paddling/Rafting</td>
<td></td>
</tr>
<tr>
<td>ATV &amp; OHV*</td>
<td>Tree Climbing</td>
<td>Canoeing/Kayaking</td>
<td></td>
</tr>
</tbody>
</table>

* ATV= All-Terrain Vehicle, OHV= Off-Highway Vehicle. (Source: Kentucky Department of Travel and Tourism, 2016)

3. Table 3. Summary of the Kentucky Trail Town program

<table>
<thead>
<tr>
<th>Lead Agency</th>
<th>Office of Adventure Tourism (OAT) in the Kentucky Department of Tourism under the Tourism, Arts and Heritage Cabinet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Guide communities to take advantage of adventure tourism for community and economic development endeavors</td>
</tr>
</tbody>
</table>
| Process                | -OAT staff educate, facilitate, and guide communities to utilize trails as a resource-based approach through the community and economic development initiative process  
-OAT staff facilitate communities to work with landowners and managers for trail access to their town |
| Approach               | Adapts the National Main Street Program principles |
| Objectives             | -Provide communities with tools to create a vibrant, healthy tourism economy  
-Provide ideas for development practices  
-Provide trail assessment, planning and implementation checklists, references, and tools  
-Provide references to state, professional, and academic resources |
| Community Benefits     | -Eligibility of marketing dollars for matching funds through the Kentucky Department of Travel and Tourism  
-Promotion in visitor guides, on state maps, on the Kentucky Adventure Tourism website, and other state tourism marketing materials  
-Visibility and promotion through a proclamation from the Governor  
-Public ceremony and window decals for participating business  
-Continued facilitation while certified |

(Source: OAT, 2012a)
Stakeholders Involved

The Office of Adventure Tourism works with applicant communities that are fully dependent on community volunteerism to achieve their Kentucky Trail Town status. In addition, the state office shares with communities a list of public agencies, programs and specialists that can facilitate and provide technical assistance for the varied topics of Trail Town development inquiry (OAT, 2014). Initially, community officials submit a preliminary Kentucky Trail Town application. Once approved, the community structures a volunteer-based task force with five sub-committees: trail route advisory, merchant, volunteer, signage, and funding/education/promotion (Fig. 1). In a number of applications, Extension educators have and continue to partner with and serve essential roles toward the community effort. Currently, Kentucky has two land-grant universities with Extension educators at the county level covering Agriculture and Natural Resources, Horticulture, Family and Consumer Sciences, and 4-H Youth Development. There currently is no Extension educator for tourism, although there is an academic unit at the University of Kentucky. The Extension educators are expected to partner with their stakeholders on relevant community and economic development projects and programs such as trail development or Kentucky Trail Town certification.

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**TRAC-Trail Route Advisory Committee** (potential members)
- User Groups
- County & City Personnel
- County Extension Agent

**Merchant Committee** (potential members)
- Main Street
- Chamber of Commerce
- Business Owners
- Interested Local Citizens
- User Groups
- Extension Office
- Economic Development

**Volunteer Committee** (potential members)
- Health Department
- Schools
- User Groups
- County & City Parks and Recreation
- Hospitals
- Churches
- Extension Office

**Signage Committee** (potential members)
- Tourism Commission
- Area Development District
- County & City Personnel
- Transportation District

**Funding/Education/Promotion Committee** (potential members)
- County & City Government
- Economic Development
- Heath Institutions
- Grant Writers
- Tourism
- Businesses

4. Fig. 1 Suggested Trail Town Task Force Committees and Membership, a community building aspect (Source: OAT, 2014)
Each community taskforce sub-committee has an essential role to accomplish goals and tasks related to the certification process by identifying, addressing and following through the Trail Town assessments and implementation. Key volunteers need to bring leadership and communication skills to the community effort. All members of the task force need to work together, be informed about, and address core trail and town assessments and development contents, in addition to other business, marketing, and promotion aspects for targeting potential adventure tourists and trail users (OAT, 2014). Ideally, all community volunteers and stakeholders are innovators in practice; therefore, a Trail Town task force should partner with other existing local organizations and groups for the shared Trail Town goals. Furthermore, sub-committees’ activities can be strategically integrated for a broad base of volunteers to effectively contribute to the community-wide effort (OAT, 2012a). During the earlier stage of the program, the state committed to awarding certified Kentucky Trail Towns with state tourism signs to be located along major roads but this was discontinued with a change in the program budget. Kentucky Trail Towns are now working with state representatives to secure the highway signs. At the local level, the Chamber of Commerce or other tourism entities often have access to modest funding resources from tourism-related revenue to assist with Kentucky Trail Town certification projects. Therefore, through a community development approach, Kentucky Trail Town task force sub-committees and volunteers should all be involved in seeking funding sources.

Approach Used and the Impact

Precedence from the Main Street America™ Program, the Trail Town Program®, and efforts of Damascus, VA, have informed the Kentucky Trail Town program. Compared to other Trail Town efforts and guidance being led by non-profit or local organizations with a focus on economic development, the Kentucky Trail Town program presents a more systematic state-wide approach where the Office of Adventure Tourism, with limited resources, facilitates communities to become stewards to better connect with a range of established recreational trails and to capitalize on adventure tourism opportunities.

The Kentucky Trail Town program applies the Main Street Four-Point Approach® of organization, design, economic vitality, and promotion to intertwine with trail development and management strategies to revitalize commercial districts and downtowns through community and economic development of sustainable tourism activities. Ultimately, the Kentucky Trail Town program supports communities to leverage their local assets for their commercial district revitalization efforts while examining strategies to become functioning gateway Trail Towns. The Office of Adventure Tourism offers initial assistance with forming a community task force and helping to organize a public kick-off presentation. They also provide contacts for other existing resources, such as the state Main Street program or the state Arts Council for downtown revitalization efforts and resources (OAT, 2012a).

The core of the Kentucky Trail Town program is focused on educating and guiding interested communities on how to organize and implement the three topical phases of assessing and creating a working Trail Town: community building, physical assessments (trail and town), and economic structures and promotions (Fig. 2) (OAT, 2012b and 2012c). The organization of a Trail Town task force discussed in the previous section exemplifies how the process of getting stakeholders involved and structured is a community capacity building effort. As community members work toward achieving Kentucky Trail Town certification, applicant
communities are naturally strengthening their relationships. The main topical assessment of the Kentucky Trail Town program is inventorying and analyzing 1) the existing area trails and potential trail opportunities, and 2) the core commercial and cultural areas and contents of the town. This phase is followed by identifying how to communicate trail experience activities through media to trail users and residents (Table 4) (OAT, 2012a, 2012b, and 2012c). A major short-term emphasis of a Trail Town would be designing and planning trail-user friendly environments.

![Conceptual diagram for organizing a working Trail Town: identify assets and capacity of local assets and resources](Image)

Table 4. Examples of Trail and Town Assessment Content

<table>
<thead>
<tr>
<th>Physical Character of Trail(s)</th>
<th>Town (Public Amenities)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trail</td>
<td>Traffic &amp; Access</td>
</tr>
<tr>
<td>-Type(s) of trail(s) close to the central business district</td>
<td>-General access between trail(s) and town</td>
</tr>
<tr>
<td>-Users (numbers, demographics)</td>
<td>-Signage</td>
</tr>
<tr>
<td>-Seasons used, days of the week, times throughout the day</td>
<td>-Safety</td>
</tr>
<tr>
<td>Trail-to-town relationship</td>
<td>-Paring</td>
</tr>
<tr>
<td>-Linear distance (internal, adjacent, removed)</td>
<td></td>
</tr>
<tr>
<td>-Vertical distance</td>
<td></td>
</tr>
<tr>
<td>-Range</td>
<td></td>
</tr>
<tr>
<td>Key Connecting Elements</td>
<td>Guidelines/ Regulations</td>
</tr>
<tr>
<td>-Trailhead</td>
<td>-Roads, trails</td>
</tr>
<tr>
<td>-Access trail</td>
<td>-Aesthetics</td>
</tr>
<tr>
<td>-Gateway</td>
<td>-Appropriate zoning</td>
</tr>
<tr>
<td>-Center</td>
<td></td>
</tr>
<tr>
<td>-Nodes</td>
<td></td>
</tr>
<tr>
<td>Land access to acquire</td>
<td></td>
</tr>
<tr>
<td>-Identify property owners to partner with</td>
<td></td>
</tr>
<tr>
<td>(Sources: OAT, 2012a, 2012b, 2012c, and 2014)</td>
<td></td>
</tr>
</tbody>
</table>
As a service provider, a Trail Town needs to consider visitor-friendly amenities such as parking, bike racks, hitching posts, public or private restrooms, information on hours of operation, and outdoor vending machines among others in central locations of their community. A Kentucky Trail Town task force should plan and prepare appropriate amenities with their private realm partners and businesses to better prepare their community to serve the different types of trails users such as hikers, bikers, or horse riders. After the initial certification, a Trail Town needs to continue with educating, encouraging, and seeking financial incentives to sustain the motivation of local businesses. As economic development is a primary goal for a Trail Town, businesses need to understand, predict and determine socio-economic characteristics of the potential customer-base (individuals and groups) and make effective decisions to attract visitors from relevant tourist markets (OAT, 2012a and 2012c). The last preparation step of the Kentucky Trail Town certification process is promoting a Trail Town effectively through positive impressions, events and targeted marketing (Table 5). The promotion aspect of the program encourages a community to strategize modes of communication with the targeted audiences whether through websites, social media, local newsletters or newspapers. These methods can be tested during the trial run/event along identified trail routes for the Trail Town initiative. Reporting on the summary of the trial run can also inform a community of the gaps in their plan of action that can be appropriately amended in pursuit of their target goals (OAT, 2012a, 2012c and 2014).

<table>
<thead>
<tr>
<th>Economic Restructuring</th>
<th>Promoting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand Trail User-Customer</td>
<td>Promote a Positive Trail Town Image</td>
</tr>
<tr>
<td>Assess Basic Trail User Needs</td>
<td>Hold Trail Town Events</td>
</tr>
<tr>
<td>Assess Longer-Term Needs</td>
<td>Conduct Trail Town Retail Promotions</td>
</tr>
<tr>
<td>Encourage Related Business Opportunities</td>
<td></td>
</tr>
<tr>
<td>Assist the Local Business Community</td>
<td></td>
</tr>
</tbody>
</table>

(Source: OAT, 2012a, and 2014)

Ultimately, all the previously mentioned steps need to be pulled together into an actionable plan, get adopted and start to get implemented by the Trail Town community (OAT, 2012a). Depending on the community, the order of how processes are accomplished may differ slightly to maintain the momentum in the community. It is vital that accomplishments are synergetic, visible and progressing for both Trail Town stakeholders and existing and potential tourists. Sustained relationships with public agencies at the regional and state levels can help identify funding opportunities and programming in the future. It is anticipated and evidenced that Trail Town developments will progress and evolve. Therefore, Kentucky Trail Town applicants and certified communities need to aim toward a longer-term outcome vision of sustained business activity in addition to the short term outputs that are important to show a community’s incremental achievements that can sustain volunteer efforts over the longer-term.

Since 2012, more than 40 communities applied for the Kentucky Trail Town certification. As of summer 2017, 18 communities of varied populations celebrated 17 Kentucky Trail Town certifications. One certification is for a collaborative effort (Tri-Cities) by three communities: Cumberland, Benham, and Lynch. Another certification is not for a town, but a river trail along the Russell Fork which flows through Elkhorn City. The Kentucky Trail
Town communities are spread throughout the state, mostly accessible by major roads within a half-day drive from urban areas (Fig. 3). Several Trail Towns are in and around the Daniel Boone National Forest which includes the Sheltowee Trace National Recreation Trail (Fig. 4). Each Trail Town promotes the types of trails that reflect the diversity of their geographic location.

The state-wide program is structured to bring communities together to promote ideal tourism economies; however, the preliminary success and effectiveness of the Kentucky Trail Town program is a work in progress. Research indicated that among the 4 points of the national Main Street Program, the organization, design, and communication efforts were more achievable and visible in a shorter period compared to economic restructuring (Robertson, 2004). All Kentucky Trail Town communities successfully organized their task force and sub-committees appropriately based on their community capacity. Among the Kentucky Trail Town program contents, the design and implementation of a signage system is a short-term achievable accomplishment that can be effective as an on-the-ground communication mode for attracting and guiding tourists. With the short history of the programming and certification process in mind, the author and trained student assistants visited sixteen of the certified Kentucky Trail Towns during the summers of 2016 and 2017 to assess the short-term achievements of the Trail Towns with a focus on visibility of wayfinding features and communication. Each Trail Town was unique in terms of its geographic and cultural context and exhibited a variety of spatial and aesthetic appearances. The Trail Towns featured a mix of visible trails, trail use related features, and amenities that were outlined in the Kentucky Trail Town certification program workbook (Koo, 2018).
Preliminary economic restructuring and promotion efforts were also evidenced through tourism related businesses and promotions in Trail Towns and an enhanced online presence. However, each community can further improve by establishing and sustaining locally-owned businesses near the major trailheads which were not always ideally located in core areas of town or near the hub of economic activity (Table 6). As for marketing, the state program’s website (https://www.kentuckytourism.com/ky-outdoors/trail-towns/) and the Kentucky Official Highway Map, available both online and at major welcome centers among other places, promote all of the Kentucky Trail Towns. Unfortunately, online promotions are susceptible to a lack of maintenance and web design changes as evidenced over the past six years. Furthermore, although a state-wide program, overall branding is not visibly consistent or communicated throughout all of the certified Kentucky Trail Towns on the ground or online (Koo 2018). This is both a strength in that communities can present their unique images to tourists, but also a weakness as a community’s Trail Town status is not always clearly depicted. Therefore, communities should continue to enhance their marketing and branding efforts, particularly by reflecting the
Kentucky Trail Town program’s logo, directly connecting trailheads to trails, increasing wayfinding features for self-guided tourists or having more tour operators/guides available to support positive tourism experiences.

Table 6. Kentucky Trail Towns: Context, types of trails promoted and the effectiveness of trailheads

<table>
<thead>
<tr>
<th>Certified Kentucky Trail Town</th>
<th>Population as of 2010 Census</th>
<th>Certification Year</th>
<th>Types of Major Promoted Trails***</th>
<th>Trailhead****</th>
<th>Convenient Location</th>
<th>Resourcefulness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dawson Springs</td>
<td>2,764</td>
<td>2013</td>
<td>H, B, E, W</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Livingston</td>
<td>226</td>
<td>2013</td>
<td>H, E, W, B</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Morehead</td>
<td>6,845</td>
<td>2014</td>
<td>H, W, B, E</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Olive Hill</td>
<td>1,599</td>
<td>2014</td>
<td>H, E, W, C</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>London</td>
<td>7,993</td>
<td>2015</td>
<td>B, H, W, A</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Stearns*</td>
<td>1,586</td>
<td>2015</td>
<td>H, W, B</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Elkhorn City</td>
<td>982</td>
<td>2015</td>
<td>W, H, E, B, A</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Jamestown</td>
<td>1,624</td>
<td>2015</td>
<td>W, H, B</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Manchester</td>
<td>1,255</td>
<td>2015</td>
<td>H, W, A</td>
<td>S</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Royalton**</td>
<td>-</td>
<td>2015</td>
<td>H, E, B</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Berea</td>
<td>13,561</td>
<td>2015</td>
<td>B, H</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Columbia</td>
<td>4,452</td>
<td>2015</td>
<td>W, H, B, E</td>
<td>S</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Tri-Cities</td>
<td>2,237</td>
<td>2015</td>
<td>H, B, C</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>(Cumberland/ Benham/ Lynch)</td>
<td>500/747</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>McKee</td>
<td>800</td>
<td>2016</td>
<td>H, B, E</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Slade**</td>
<td>-</td>
<td>2017</td>
<td>H</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Munfordville</td>
<td>1,615</td>
<td>2017</td>
<td>W, H, B, C</td>
<td>S</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>

* census-designated place, ** unincorporated community
*** H=hiking, E=equestrian, W=water, B=bicycling, C=caving, A=ATV riding
**** Y=yes, N=not at the time of assessments, S=somewhat existed

(Sources: U.S. Census Bureau, 2013; Kentucky Department of Tourism, 2018; Koo, 2018)

From the organizational perspective, the timelines of community interest, support capacity, and funding mechanisms to address community needs and actions for change are not always continuous and may be challenging. Leadership, fluctuation of interest, momentum and time investment may change during the Kentucky Trail Town certification process and afterward while implementing items in the shared long-term community effort. Not all inaugural applicants from 2012 accomplished their certification. Several communities’ efforts have stalled for years while others have succeeded in a relatively short number of years. On average, it has been taking communities around two years to become certified. To overcome some organizational hurdles, task force members should be aware of efforts by other committees or groups so that projects are coordinated and work effectively to create a vibrant Trail Town. Furthermore, regional partnerships can offer extended resources and opportunities through effective synergy.
From a community development perspective, the population of a Kentucky Trail Town was not necessarily a limiting factor. As an illustration, the community of Stearns in McCreary County was a timber and coal company town that transitioned into a natural gateway to the surrounding natural assets once most harvesting and mining operations ceased. Although small, Trail Town Stearns provides a scenic rail route that takes visitors deep into the Big South Fork National River and Recreation Area near the Tennessee border with a flavourful yet prominent trailhead in addition to a number of other trails that can be explored (Fig. 5) (Fig. 6).

Fig. 5 Stearns Kentucky Trail Town in McCreary County near the Big South Fork National River and Recreation Area and the Daniel Boon National Forest (Mapped by author) (Data source: KYCE, 2012; KYDGI, 2001 and 2006; KYIA, 2007; KYTC, 2015 and 2017; USDA FSA NAIP, 2015; USGS, 2016)
Through several return visits, we have evidenced various levels of progress for communities that are embracing their Trail Town initiatives while working toward their plans of action. Since the initial certification, some Kentucky Trail Towns have continued to progress and enhance their trailheads, signage systems, or increase service providers. As a long-term vision, the Kentucky Trail Town program specifies that certified towns are subject to annual visits to sustain the branding effort (OAT, 2014). Thus far, no certified Kentucky Trail Town has been de-certified. Furthermore, the Office of Adventure Tourism has held annual summits and continued its educational efforts on trail development and funding opportunities.
Implications & Lessons learned

The Kentucky Trail Town program has opened a new era of opportunity for revitalizing economic activity in communities through adventure tourism endeavors. The state-led program is grounded in sustainable tourism practices through a volunteer-based community effort where the Office of Adventure Tourism facilitates Kentucky communities to strengthen their wellbeing and economies while appealing to future adventure tourists.

Initially, potential applicant Trail Towns may be limited in resources (labor, funds) and services (amenities, businesses). State support for product development would be ideal, but may be dependent and susceptible to annual budget fluctuations. However, with a longer-term vision and plans in place, communities can be ready to pursue funding opportunities (state, federal, foundations) as they arise. The size of a Trail Town community is not necessarily a limiting factor. If interest and participation can be maximized, a small community can succeed in attaining Trail Town certification through a holistic community development effort where everyone nurtures the potentially long-term vision of hospitality and hosting tourism activities. Furthermore, the cooperation of local businesses and trail maintenance groups is crucial not only for the certification process but also for sustaining the state-wide branding effort to promote trail-based recreation as a viable strategy for increasing economic growth in communities striving for sustainable tourism.

The Kentucky Trail Town certification program may not be suitable for all communities and not all eligible communities may choose to take advantage of it. However, the established Trail Town framework and process can be beneficial for communities to follow in order to achieve other community and economic development goals, regardless of certification. Also, the Kentucky Trail Town program is one of a handful of programs that is easily adaptable to communities in similar contexts elsewhere. Overall, the Kentucky Trail Town program is a rigorous and ambitious tourism practice that signifies long-term commitments from its host communities.

Discussion Questions

1. What are the similarities and differences of Trail Town development programs and practices relevant to trail-based tourism development?
2. What are some strengths, weaknesses, limitations, or opportunities of the Kentucky Trail Town program that communities interested in trail-based development can apply to their sustainable tourism development practices?
3. Who in the communities should ideally be involved in a Trail Town initiative and what skills or assets can they bring to support a community’s tourism ventures?
References


Author

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Chapter Summary

This case study describes an innovative model that was developed to enhance business performance and visitor satisfaction in the artisan sector. ÉCONOMUSÉE® is a non-profit organization founded in 1992 in Quebec, Canada which now includes over 70 Artisans from across Canada and Europe. The model promotes the preservation of traditional knowledge and local entrepreneurship by utilizing cultural tourism to showcase artisans and encourage the consumption of locally produced artisanal products. The model was introduced to the province of British Columbia in 2010 by La Société de développement économique de la Colombie-Britannique (SDE) as the catalyst for the initiative ÉCONOMUSÉE® British Columbia Artisans at Work. SDÉ aims to facilitate the economic growth of rural communities in B.C. through the implementation of the ÉCONOMUSÉE® model. Overall, the evidence in this case demonstrates the value of adopting the ÉCONOMUSÉE model to artisan businesses in the region and provides justification for expansion of the model to expand it in other jurisdictions. This case makes an important contribution to the tourism literature and encourages academics to pursue future research to better understand intersections between tourism and the artisan economy.

Learning Objectives:

At the end of this case study, readers will be able to:

1. Define what an artisan is and be able to list at least 3 examples of utilitarian and consumable artisan trades;
2. Articulate factors that underlie the re-emergence of the artisan economy;
3. Identify and describe the six elements of the ÉCONOMUSÉE® model;
4. Discuss the role that cultural tourism can play to enhance the success of artisan enterprises;
5. Suggest future questions that tourism researchers should address to expand further study on the intersection between tourism and the artisan economy.
Introduction

Over the past decade, artisanal entrepreneurs have been altering the economic landscape by introducing new utilitarian and consumable crafts into the marketplace. From artisan cheeses, craft beer to fibre creations, new artisanal products are appearing at local farmers markets, specialty stores or on the menus of pubs and restaurants. When observed at the micro level, the emergence of these new products may appear to be of little significance to the national economy yet according to Foote (2015), “the artisan sector is part of a much larger global creative economy that, if it were a country, would already be equal to the fourth-largest economy in the world, with the fourth largest workforce.” Beyond the economic significance, the sector also plays a vital role in protecting the intangible cultural heritage of the communities and societies that artisanal goods are created in (Bonn et al, 2007). To create an artisanal craft requires the use of traditional knowledge and local resources resulting in goods that “originate from and are rooted in the uniqueness of people and place” (ACS, 2011; Pouls, 2013; Foote, 2015).

While artisans were once dominant across North America, their goods – and thereby their crafts - were largely replaced by the introduction of technology and mass production. However, rapid technological advances have transformed the global economy and consumers can now access a wider range of goods aided by their personal computers, access to the internet and travel. This has allowed increased global competition and market fragmentation creating space for small businesses offering specialized products to regain a foothold in the economy. This transformation of the global economy and the re-emergence of artisanal products has been driven in large part, by consumers’ desire for local, customized and authentic products and experiences (Vaugeois & Predyk, 2016).

At the root of all artisanal trades is the concept of craft or the design and small-scale production of quality goods from natural and human-made materials such as clay, glass and wood, or from animal and plant substances such as milk, grain and meat. Frequently, only small quantities are produced at one time by an accomplished person or by a small cluster of skilled individuals (Fisman, 2012; Hamilton, 2012). These trades are strongly characterized by their integration of traditional knowledge and skills, and artisans are therefore the carriers of traditional crafts. In a SSHRC Knowledge Synthesis Grant on the traditional craft trades Vaugeois, et al (2013) created a typology comprised of two categories of artisanal trades (figure 1). Utilitarian trades integrate traditional knowledge and skills in the production of functional and/or decorative goods. Consumable trades integrate traditional knowledge and skills in the production of edible and/or cosmetic goods. Canada has a highly talented artisanal workforce that protects its diverse cultural heritage and contributes to the symbolic values, identities, and economic wellbeing of society (Petrov, 2007). For example, artisanal trades such as blacksmithing and cheese-making preserve regional cultures and traditions while also building economic opportunities for rural and northern individuals and communities. These trades also foster social and economic innovation because artisans constantly explore new ways of expressing traditional knowledge and skills. The products that are created through artisanal craftsmanship are supported by a growing interest in and consumption of authentic and local products (Sidali et al, 2015). The sustainable advantage of artisanal firms is the uniqueness of each end product (Ponder, 2010) and the ability to appeal to more affluent consumers who are increasingly interested in niche products.
While the artisanal economy is emerging in both rural and urban contexts, the sector provides significant opportunities for entrepreneurship in Canada’s rural regions (Petrov, 2007; Burnett and Danson, 2017). Entrepreneurs play a vital role in economic restructuring for rural regions (Cartier, 2012; Shields, 2005) yet their evolution and survival is not without its challenges. While approximately 25% of micro businesses are located in rural and small communities, their survival rate is significantly less than those in urban settings (Siemens, 2010, Rothwell, 2010, Cartier, 2012). Some of these challenges are associated to the motivations of entrepreneurs who often assume the role of entrepreneur for lifestyle reasons (Siemens, 2014) or to remain in the places they have become attached to (Kumar and Vaugeois, 2018). Artisanal entrepreneurs are likely to face additional challenges since they assume dual and not necessarily complimentary roles as both artisans and entrepreneurs (Paige and Littrell, 2002; Vesala et al, 2007). Artisans are masters of their craft who assume an entrepreneurial role to bring their products to market. Training to master their craft skills is largely gained through hands on learning and mentorship and many do not have training in business and are self-taught entrepreneurs (Vaugeois and Predyk, 2016). There is a need to build upon the insights gained in rural entrepreneurship literature (Pato and Teixeira, 2014; Brunton et al, 2008; Burnett and Danson, 2017; Shields, 2005) to understand the motivations and experience of artisanal entrepreneurs in rural contexts and to explore
what type of supportive policies can enable their success (Sarkar and Banerjee, 2007; Ladd, 2017). Additionally, insights gained on artisan entrepreneurs may also contribute to the refinement of entrepreneurship and human capital theory (Ponder, 2010; Alvarez and Busenitz, 2001; Marvel et al, 2016).

At the present time, the artisanal trades are poorly understood and academic literature on the sector has only recently started to emerge (McKitterick et al, 2016, Sidali et al, 2015). Incongruous definitions have made it challenging for policy-makers and the general population to grasp the meaning or significance of the sector or to identify its respective trades. What is known about the artisanal trades in Canada has emerged from a synthesis of literature on both the cultural sector and the small-scale agrifood sector (Vaugeois et al, 2013). Currently, these two bodies of knowledge are not addressed together in either the academic literature or in government and industry reports.

The challenges within Canada to define and determine the value of the artisan sector are mirrored elsewhere in the world. The US Department of State indicated that “the artisan sector globally has been valued at $32 billion dollars, but the economic impact is not always recognized” (US Department of State, 2015). Researchers in Portland have produced significant new insights about the economic and cultural shifts associated to the artisan economy (Heying, 2010, Cannon, 2009) and rationale for nourishing the maker and artisan community. The Artisan Economy Initiative in Portland (Marotta, 2015) found that over 90% of small maker enterprises did not show up on national small business databases. Despite this relative invisibility, the small makers in their study had a positive impact on the local economy in Portland alone employing over 1000 people, generating over $250 million in revenue and collectively, artisans experienced an average 60% increase in revenue growth over a three year period. The artisan movement in Australia has experienced rapid growth and highlighted that traditional economic measurements such as productivity may not provide an accurate picture of the economic value of the artisan economy. The Australian Productivity Commission found that “due to their lack of scale and amount of labour involved, artisan bakeries, wineries and breweries are aggravating a continuing decline in productivity” (Sprothen, 2015). Research is needed to understand the experience and operations of artisanal entrepreneurs to ensure that appropriate enabling supports are available to foster its growth.

Beyond economic benefits, others are also recognizing the important role that artisanal businesses are enacting to educate society on important issues of heritage preservation (Bryan et al, 2012; Corsane et al, 2007). As visitation to traditional heritage venues such as museums has been on the decrease (Cheney, 2002), the emergence of new venues that provide education about Canadian heritage are needed. Within Canada, as well as internationally, the ÉCONOMUSÉE model has emerged as a successful business model to support artisanal entrepreneurs and cultural rural tourism (Gervais, 2014; ENS, 2018; Macdonald & Joliffe, 2003). Designed by Dr. Cyril Simard from the University of Laval, this model attempts to design a visitor experience that fuses education and consumption of products from artisans. This model aligns with research in a variety of fields including tourism, museology and consumer behavior (Cameron, 2007). Providing consistent, high quality visitor experiences is both challenging and complex (Chronis, 2012; Reussner 2003) as todays visitors are increasingly interested in authentic and “real” experiences (Bonn et al, 2007; Lopez-Sintas et al 2012) which they are most likely to receive when they are able to learn about and interact with the people and context where they visit (Grenier 2010; Macdonald 2007; McKay, 2007). In an effort to educate visitors, many artisans are adopting strategies from the museum world (Bannon et al, 2005) – a practice which is believed to impact financial performance as well (Hume, 2011). When visitors observe the creation of a product and have a chance
to “meet the maker”, it provides a feeling of authenticity and a perception that the products have more perceived value thereby incentivizing purchase behaviour (Geissler et al, 2006). Similarly, the perceived high quality of the products helps to create a loyal customer base which influences repeat visitation for additional purchases. The design of business models such as the ÉCONOMUSÉE model hold promise for artisans as they have been shown to be effective at increasing the profitability of the artisan businesses and enhancing the experience of visitors (Predyk and Vaugeois, 2018).

The Context

The emergence of the artisan economy presents a significant opportunity for British Columbia, Canada particularly in the Vancouver Island region (figure 2). Many artisans are small businesses which comprise 98% of businesses in British Columbia (Small Business Profile, 2016) and 67,387 small businesses on Vancouver Island (Small Business is Big Business, 2016). Artisan products enable local purchasing thereby keeping money in the local economy and they are also purchased by tourists, one of the region’s main economic drivers.

Figure 2: Map of British Columbia

Source: Natural Resources Canada
The region has been actively involved in supporting and researching the impact of the artisan economy in the region. In 2012, an initiative was pursued by Vancouver Island University in partnership with La Société de développement économique de la Colombie-Britannique (SDE) to complete a SSHRC Knowledge Synthesis project to collate knowledge on the Traditional Craft Trades (TCT’s) in an effort to enable the sector to emerge more prominently as a contributor to the Canadian economy. The knowledge gained in the project was a valuable first step to highlight the labour and training needs of the sub-sector, but it also identified significant knowledge gaps that must be addressed in order to fully realize its’ potential. In particular, the report highlighted the need to develop a clear definition of the sector and to determine the value of the sector to the economy. In a later study in 2016, utilizing the typology created in the Knowledge Synthesis project, Vaugeois & Predyk created an inventory and survey on BC’s Food Artisans to assess the economic significance of the sector. It uncovered evidence that consumer demand for artisanal products has been increasing whereby 80% of artisans indicated that demand for their products over the past 3 years had increased. This demand was generated from both resident markets (70%) and visitor markets (30%). This increase aligned with business growth whereby 85% of artisans indicated either significant or moderate growth over the previous 3 years. Artisans were interested in seeing this growth continue and 86% indicated that their future plans were to grow their business. Businesses were found to generate 100% of employment income for 48% of the artisans, with another 40% earning at least 50% of their income from their artisan business. Employment generated by the artisan businesses was more likely to be full time and permanent, with little fluctuation in the averages by season. Artisans were using a diverse distribution strategy with the top mechanisms being in local shops, farm markets, local grocery stores and restaurants.

**The innovation**

ÉCONOMUSÉE is trademarked and recognized by UNESCO as a model for the preservation of intangible heritage. There are currently 53 ÉCONOMUSÉES in Canada (Atlantic Provinces and Quebec). The ÉCONOMUSÉE International website, indicates that artisans – through their respective craft trades - perpetuate history, tradition and often even a part of the cultural identity of a village, region or country. Due to their ability to preserve intangible heritage, artisans promote and safeguard traditional forms of knowledge. They also generate wealth and contribute to the vitality of the communities and regions where they are located creating direct and indirect jobs, purchasing locally and investing regularly in infrastructure and equipment. The model integrates traditional craft trades and tourism and views cultural tourism as one of the best ways to showcase artisans. The ÉCONOMUSÉE® concept is part of a dynamic agri-tourism and experiential cultural tourism approach that allows people to:

1. Meet artisan entrepreneurs who welcome visitors to premises where artistic creation and production take place
2. Get to know, exchange and share with artisans the craft they exercise with passion
3. Discover production models based on tradition and products carefully crafted on the premises
4. Admire excellence, savour for the pleasure of the senses and live moments of emotion
5. Participate in an interactive and authentic cultural experience
6. Stand out from the competition

The model supports a new pattern of consumption with a human dimension. Artisan trades are vulnerable and in some cases even threatened by large-scale industrial production. The products that are made by artisanal entrepreneurs offer more localized purchasing options that are unique and of high quality. They meet the needs of residents and visitors who are more aware of the impacts of their purchasing decisions and who are seeking authentic choices. The ÉCONOMUSÉE model attempts to design a visitor experience that fuses education and consumption of products from artisans.

In order to become an ÉCONOMUSÉE, an enterprise must meet selection criteria and integrate fundamental components into its premises including: a) a welcoming area where visitors are greeting and find out what an ÉCONOMUSÉE is, b) a workshop where visitors can see artisans working on their craft, c) an area for the interpretation of traditional knowledge, d) an area for the interpretation of contemporary know how, e) an area for documentation and archives and f) a boutique where people can purchase the products. The entrepreneur works with a support team from the Société de développement économique de la Colombie-Britannique (SDE) which includes key personnel such as a Project Manager, Communications and Marketing Officer, Interpretation planning and Design of Interpretation and Exhibits elements Experts, Research and Content development Experts, and Video and media producers. There is a fee for participation in the program which varies depending on the level of readiness at the business and what work is needed to integrate the six components of the program. The team works with the business to assess readiness and then designs a visitor experience program that incorporates the elements of the model. ÉCONOMUSÉE British Columbia Artisans at Work took hold in British Columbia as a result of a research and inventory project, conducted in 2009 and 2010 by the SDE whose primary intent was to look at the fit of the ÉCONOMUSÉE model for the BC region as an economic development tool mainly in the rural context. In 2012, British Columbia joined the ÉCONOMUSÉE network by opening its first two pilot sites at Merridale Ciderworks in Cobble Hill, and at Hazelwood Herb Farm in Yellowpoint. Since that time, the model has expanded to include 9 businesses, 8 of which are in the Vancouver Island region. This case will highlight the impact of the business model on Merridale Ciderworks, the Hazelwood Herb Farm, Tofino Cedar Furniture, Wayward Distillation House, Townsite Brewing, Mary Fox Pottery and the Okanagan Lavender and Herb Farm.
The Sites:
Merridale Ciderworks
*The Cider ÉCONOMUSÉE*

Merridale is a Heritage cider apple orchard located in the Cowichan valley where climate conditions are suitable for the growth of world class cider apples. From harvesting, to pressing, to fermentation and bottling, visitors will discover each step required in the crafting of a great cider product.

The Sites:
Hazelwood Herb Farm
*The Herbology ÉCONOMUSÉE*

Hazelwood farm is also located in the Cowichan Valley, just north of Ladysmith. The farm is known for the incredible varieties of herbs grown and processed on site. Over 450 herbs are grown there, and their product line includes beauty, health, and culinary products. While the farm has been in operation for 25 years, a recent change in ownership and a strong interest in increasing the visitor experience on site have created the right conditions for an Economusee conversion to occur.
The Sites:
Tofino Cedar Furniture
The Chairmaking ÉCONOMUSÉE

Tofino Cedar Furniture is located in Tofino on the rugged west coast of Vancouver Island. Since 1993 they have been specializing in Adirondack furniture made from local salvaged western red cedar. Visitors to their shop can see them crafting furniture that will last as long as 30 years in any climate.

The Sites:
Wayward Distillation House
The Distillery ÉCONOMUSÉE

In the heart of the Comox Valley, Wayward Distillation House is the first Canadian distillery to use honey as a base to craft spirits. Using BC wild clover honey, Wayward balances tradition and creativity to create vodka, gin and many other unique spirits. Visitors to the distillery have the opportunity to tour the facilities, learn about the honey distillation process, and taste the spirits.
The Sites:
Townsite Brewing
The Beer Brewing ÉCONOMUSÉE

Located in the historic Townsite district of Powell River at the top of the sunshine coast, Townsite Brewing is an award-winning microbrewery founded in 2011. Led by the only Belgian born brew master in BC, Townsite gives visitors an opportunity to try a wide variety of favourites and unique Belgian craft beers.

The Sites:
Mary Fox Pottery
The Pottery ÉCONOMUSÉE

An internationally acclaimed ceramist Mary Fox creates contemporary Raku stoneware as well decorative and functional ceramic vases and vessels. Visitors to the Ladysmith studio and gallery can learn about her innovative glazing techniques, fabrication process and purchase one of her pieces.
Research insights

There is a need to support the emerging artisan economy as most artisans are not trained in entrepreneurship and are largely self-taught (Vaugeois & Predyk, 2016). The Société développement économique de la Colombie-Britannique (SDÉ) supports artisans by introducing and promoting the ÉCONOMUSÉE© model. They commissioned a study in 2017 in order to provide data on the growth and impact of the ÉCONOMUSÉE program in British Columbia since it was first introduced to the province in 2012. The guiding question was: what is the economic impact or change in the economic performance at each of the sites using the ÉCONOMUSÉE model? Multiple methods were used to measure the impacts of the model on the economic performance and visitor experience including in-depth interviews with operators, an online survey of visitors, and observation of site usage by visitors. The Economic Impact was calculated using a combination of secondary data from the financial documents of the businesses by the owners. Owners were asked to provide information on their sales (annual and for the July 1 – Sept 30 business quarter), profitability, and labour force for the year prior to becoming an ÉCONOMUSÉE site to develop a baseline for each site. They were also asked for the same information for the July 1 – Sept 30 quarter for 2017 as well as information on the financial and temporal investments made in transitioning to an ÉCONOMUSÉE. This data were analyzed to determine the economic impact of implementing the model on their business. Confidential qualitative interviews were also conducted at various time during the summer and fall of 2017 with the site operators to get their perspectives on the benefits/costs of joining the network and recommendations going forward.
The impact

Economic Impact

The study identified that visitation levels should increase in the first year of operation as an ÉCONOMUSÉE site. Though only three sites were able to provide data on visitor levels, all three saw an increase in visitation post-ÉCONOMUSÉE. Similarly, revenues should increase in the first year of operation with the ÉCONOMUSÉE model. Five of six sites reported increased sales revenue. ÉCONOMUSÉE sites have created an increase in total annual economic activity since becoming an ÉCONOMUSÉE member. Employment opportunities should increase over time within participating artisanal businesses. The results indicated that 20 new full-time and 7 new part-time job opportunities (directly and indirectly) have been created after implementing the model.

VISITOR EXPERIENCE

Predyk & Vaugeois (2018) highlighted that the introduction of the model also had positive impacts on visitor experience. Each of the ÉCONOMUSÉE sites in the study saw an increase in visitation after the introduction of the model. The sites attracted both local residents as visitors and approximately half were from outside the region and required an overnight stay on their experience. Visitor motivations ranged from purchasing products, supporting local producers, exploring the area or going on an outing with family. The majority of visitors were first time visitors and the average number of repeat visits for return visitors was 5. Visitor experiences were rated extremely positive by 93% of visitors and 96% of visitors indicated that they would recommend visiting the artisan to others. Of the six elements in the ÉCONOMUSÉE model, visitors were most satisfied with the retail boutiques and the welcoming areas of the sites.

Conclusion

At this point in time, it appears that there are several positive indicators of success for the ÉCONOMUSÉE model. Of the three sites able to provide data on visitor levels, all three saw an increase in visitation post-ÉCONOMUSÉE. Five of six sites reported increased sales revenue and improved bottom line performance post-ÉCONOMUSÉE. The introduction of the model has aided in the creation of new full-time and part-time job opportunities (directly and indirectly).

While the focus of the model is to aid in the design of exceptional experiences and brand them to the marketplace, the findings highlighted that there is a low level of awareness about what an ÉCONOMUSÉE is in the marketplace. There is potential to consider rebranding the concept to enhance this awareness or collaborative work with tourism marketing bodies could leverage their expertise to ensure greater awareness results among consumers. Additionally, some entrepreneurs were not sure of the direct financial impacts that the model had on their business and had this evaluation not occurred, the impact may have remained undervalued. Rebranding the model and ensuring that businesses have a system in place to evaluate the return on investment and improvement in visitor experience may enable the model to have a stronger uptake with other artisanal businesses as well as consumers.

Overall, this case demonstrates an innovative model to aid in the economic sustainability of small businesses in the artisan sector. The introduction of the model in the BC context has shown a range of
positive impacts and value in adopting the ÉCONOMUSÉE model to Artisan businesses in the region. This evidence may be useful to other artisan businesses to implement the model or components of the design concept and justifies investment in the model by those involved in rural economic development in other contexts within and outside of Canada.

Future research

This case study provides a useful starting point for further research that intersects cultural tourism, entrepreneurship and the artisan economy. As a point of departure, the authors would recommend that future enquiry be targeted toward the following questions to build a stronger foundation of knowledge on the artisan economy.

- **Artisans** – What can artisanal entrepreneurs tell us about their motivations to become an artisan? To what extent are they motivated to become expert crafts people or to be successful entrepreneurs? What could they tell us about their experience becoming an entrepreneur and the evolution of their business? What are their business goals and what supports do they need to enable their success? How do craft trades aid in the cultural and economic goals of indigenous artisans?

- **Economic and cultural development agencies and policy makers** – What are the most pressing business challenges for this sector? How aware are local and regional economic and cultural development agents of the needs of artisanal entrepreneurs, particularly in rural contexts? What policies and regulations currently enable or constrain the growth of the sector and are there examples of promising supports that merit sharing with others? To what extent does tourism support and benefit from the presence of a strong artisanal sector within a region?

- **Consumers** - Who is driving the demand and consumption for artisanal products? What motivates local residents and visitors to support artisan businesses? Are consumers learning about - and acting upon - the heritage preservation and sustainability messages that are conveyed by artisan businesses?
References:


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Reverse Osmosis: Cultural Sensitivity Training in the Costa Rican Luxury Ecolodge Setting

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Chapter Summary

This case study portrays a real situation and account of staff training designed to improve staff morale and bridge their intercultural understanding of international visitors, encountered during a 2-month fieldwork at Latitude 10 Exclusive Beach Resort, Costa Rica, in the fall of 2011. The training approach employed by Cayuga Sustainable Hospitality described in this case takes the reader through steps designed to reach common understanding, first among the employees and management of Latitude 10, and then between staff and visitors. Andrea Bonilla who is the co-owner and VP Operations of Cayuga Sustainable Hospitality, visits Latitude 10 with the mission to improve quality of service and staff morale. She facilitates several hands-on experiential workshops and staff team-building exercises over several days of her visit. The emphasis of each exercise is on understanding each person on the team, improving team communication, and understanding the perspective of visitors. Throughout this process, it becomes very clear that management needs to focus on strengthening the team, and only then the collective can reach the goal of exceptional service. Within the mission of strengthening the team lies complex socio-cultural dynamics between local and city employees, those between staff and management, and finally between the staff and international visitors. In addition to the cultural clash of tourist expectations and performance by local staff, the case also connects other intertwined issues of poor employment opportunities in the remote beach destination of Santa Teresa, the question of social and economic sustainability that the management must face, and the continuous relationship-building between tourists and local staff to facilitate meaningful and enriching travel experience.

Learning Objectives:

After discussing the case, students will be able to:

1. **Apply** the following programming theories: Symbolic Interactionism, Social Exchange Theory, Personality, to the socio-cultural issues presented in the case (see Fennell, 2002).
2. **Explain** the above-mentioned theories from three perspectives: the local employee, the visitor, and the management (Latitude 10 and Cayuga Sustainable Hospitality).
3. **Analyse (compare and contrast)** the socio-cultural aspects of the case from the psychological & social empowerment/disenfranchise perspectives of the local employees. (See Scheyvens, 1999)
4. **Demonstrate** how as a manager of Latitude 10 and Cayuga Sustainable Hospitality you would solve the socio-cultural differences between visitors and local employees presented in the case. **Develop** solutions for local employees, visitors, and the management. (See Appendix 1)
5. Use the Typology of Tourists and Influence Upon the Community (Font, 1995; adapted from Smith, 1990) to **evaluate** the managerial actions which would ensure socio-cultural sustainability. (See Appendix 2)
The Issue, Opportunity or Trend
Luxury Ecotourism Travel in Costa Rica: The Question of Intercultural Understanding

The issue of intercultural understanding, particularly between individualist and collectivist cultures, has been identified as increasingly important in the context of global tourism. The idea of training employees in the global village where managers are dealing with multitude of cultural, social, and personal factors—both demographic and psychographic—presents endless and dynamic challenges (Sharma, et al., 2009; Kielbasiewicz-Drozdowska & Radko, 2006; Landis et al., 2004). The good news, as exemplified in the Handbook of Intercultural Training (Landis et al., 2004), is that modern HR training in tourism is focused on cognitive, emotional and behavioural changes in employees across variety of other demographic and psychographic characteristics. Mutual relationship building between culture, tourism, and communication process depends on the awareness of respectful attitudes toward “otherness”, or in other words on the acceptance of “cultural relativism” (Kielbasiewicz-Drozdowska & Radko, 2006). The increasing interaction between cultures in tourism brought needed focus to host cultures rather than the customers’ perspective which is mostly grounded in individualist cultures (Landis et al., 2004; Sharma et al., 2009). Consequently, there are direct managerial implications pertaining the intercultural service encounters and the needed intercultural competence among local employees, which influences perceived service levels and satisfaction among employees and customers (Sharma et al., 2009). These were the very issues approached by the management team at Latitude 10.

Sylvia, the General Manager of Latitude 10 Exclusive Beach Resort, was getting ready for the big day. The humid Pacific air stirred with talks of Andrea Bonilla, the co-owner and VP Operations of Cayuga Sustainable Hospitality, who was visiting Latitude 10 for several days. Looking in the mirror, Sylvia knew she was shouldering the responsibility for the overall performance of the small eco-resort. Her youthfulness and small stature staring back at her from the mirror did not help in giving her the needed authority. During her internship with Cayuga, she was at the top of her class and keen on trying a management role that was far removed from the noise and business of San Jose.

At Latitude 10, Sylvia was successful in creating a good team, despite the perceived differences between staff from the “big” city and the local staff from the remote beach town of Santa Teresa (see Figure 1). She learned quickly how to speak with local staff members so that she would not offend them, and in particular how to interact with local male employees who were much older and more experienced than herself. She had yet to make strides in bridging the employees’ understanding of international tourists with service quality demands placed on her by Cayuga Sustainable Hospitality, Sylvia’s ‘boss’. Still, her accomplishments were far from her mind as she was anxiously planning the morning and preparing her staff. Sylvia was aware of certain shortcomings pertaining to guest expectations and quality of service in the demanding luxury category. She knew that staff performance and morale needed to be significantly improved, despite the ongoing issue of seasonal employment which came along with the destination.

Sylvia understood that over the next few days all her efforts thus far would be scrutinised and evaluated by Andrea. How will she make her staff see from the guests’ perspective which is inherently tied to their seemingly high expectations? How will she bridge the gap of cultural norms between the punctual and detail-oriented
tourist and the easy-going laid-back ‘Tico’? How will she further unify the team; those from San Jose and locally from Santa Teresa, the new interns and others who have worked at Latitude 10 for several years, the young singles with no experience and no local ties and those older with families and dependants who have years of experience under their belt? How will she apply her management style to reach the business objectives and yet have her entire team on board and engaged? Most of all, how will she address what is entirely outside of her control; the seasonality of work in Santa Teresa being largely responsible for the never-ending training of staff?

Figure 1. Silvia (fourth from the left) and some of the staff at Latitude 10 with trash collected from the beach.

The Innovation
Case Context: Ecotourism in Costa Rica

Costa Rica is THE destination for nature lovers! The small beautiful country boasts some of the best wilderness experiences and wildlife spectacles in the air, on land, and in water. Visitors can preview these experiences on video and plan their trip according to the Greatest Wildlife Spectacle Calendar available on the official Costa Rican Tourism web site (visitcostarica.com, 2017a). Costa Rica has been promoted by the Costa Rican Tourism Board (ICT) as an ecotourism destination (visitcostarica.com, 2017b). The national focus on ecotourism can be seen across all sectors of tourism and is wholeheartedly embraced by large and small operators, alike. CANAECO, the National Chamber of Ecotourism and Sustainable Tourism of Costa Rica, demonstrates Costa Rica’s commitment to sustainable tourism, and ecotourism in particular. The organization’s focus is on using the low impact tourism model in the country’s socio-economic development strategy, and by doing so, making the protection of Costa Rica’s natural and cultural heritage top priority (CANAECO, 2017). In fact, Costa Rica continues to emerge as the world leader in sustainability and ecotourism, for example: deriving 99% of energy from renewable sources, developing zero-
emission coffee companies, incorporating the right to a healthy environment in its Constitution, and operating carbon-neutral airlines (Rubio, 2018).

Because ecotourism is so well established in Costa Rica and due to the country’s well developed infrastructure, international visitors in the higher income bracket tend to come equipped with high expectations of both the experience and service delivery. The tourist market is unique in Costa Rica, attracting responsible and ethical travellers. Authenticity of wilderness experience and responsible behaviour of visitors is ensured by several national programs: Certification for Sustainable Tourism (CST, 2017), Blue Flag Ecological Program (beaches category) (PBAE, 2017), Payments for Ecosystem Services (IIED, 2017), and National Forest Financing Fund (FONAFIFO, 2017). Currently, there are 150 beaches in Costa Rica which proudly display the blue flag, indicating they have met at least minimum standards of the Blue Flag Ecological Program (Arias, 2017). Among the cleanest beaches is the town of Santa Teresa in the Puntarenas province. See interactive map at the bottom of the article for complete list of beaches with blue flags (Arias, 2017).

Sustainable Tourism Practiced by Latitude 10

Key sustainability projects at Latitude 10 equally embrace the socio-cultural, ecological, and economic aspects, all of which are inherently interrelated. Addressing the socio-cultural component of sustainability, guests to the eco-resort are provided with a sense of place connecting them with the local culture and people, such as through their participation in various local projects. For example, travellers are invited to support the program “Building for the Future”, in partnership with the Earth Equilibrium NGO, which provides key supplies and computer access to students in local schools surrounding the eco-resort (latitude10.resort.com, 2017b). Opportunities presented by such travel philanthropy projects allow guests an insight into the local life, their contribution to education, and authentic space for conversation with local staff. Equally important is the issue of intercultural sensitivity training among the local staff, many of whom do not travel extensively and do not have personal exposure to other cultures that may be very different from their own. Facilitating intercultural understanding between the hosts and guests provides the necessary environment for positive interaction, perception, and mutual respect. Consequently, focusing on the people (both hosts and guests) will ensure long-term success of the business and its bottom line, as well as its contribution to the local economy.

On the account of local economy, Latitude 10 management—and Cayuga Sustainable Hospitality in general—are committed to hiring locally and helping the community by offering year-round positions and cross-training to avoid seasonal layoffs (Gardner, 2017; 2018). Across the 9 properties in their management Cayuga Sustainable Hospitality hires over 400 local staff, and each property hires 80-100% from the local community (Gardner, 2017). The commitment of Latitude 10 is aimed at residents of Santa Teresa and nearby area due to limited employment opportunities, especially during the low season. In some cases, local staff get access to English lessons taught by a temporary volunteer, but in general many do not speak English and are still given priority of employment (latitude10.resort.com, 2017b). Another example of supporting local economy via the multiplier effect is by purchasing and advertising local products to visitors. Some examples include promotion of authentic art from local artists, local services (e.g., massage, horse riding, surfing lessons), and locally made organic soaps and shampoos which became very popular among guests after using these at the eco-resort.

Finally, under the management of Cayuga Sustainable Hospitality, Latitude 10 also fulfills the ecological component of sustainability. Because the eco-resort is located near the beachfront where the rainforest meets the Pacific Ocean, maintaining minimal impact on these environments and educating travelers is very
important. As regular practice, management and staff support the commitment to ecological integrity which includes beach cleaning around the property, and variety of water conservation efforts such as installing low flow toilets and using waste water treatment system. The casitas allow constant cross-ventilation, creatively replacing the need for air conditioning, and the water is heated by solar panels. In the kitchen, staff do not serve any endangered species of seafood, and effort is made on serving locally produced organic fruits and vegetables, organic coffee, and biodynamic wine (latitude10.resort.com, 2017b). And if you want to sip your drink with a straw, you will have one made of bamboo!

Stakeholders Involved
Company Background: The Cayuga Sustainable Hospitality Approach and Latitude 10

The Cayuga Collection consists of seven eco-lodges and boutique hotels in Costa Rica, one in Nicaragua, and one in Panama. They are scattered along the Pacific coast from Osa Peninsula in the South to Guanacaste in the North, across the Costa Rican border in Granada, Nicaragua, and across the Southern border with Panama in David (see Figure 2). The properties are managed by Cayuga Sustainable Hospitality which is co-owned by Hans Pfister, President and Andrea Bonilla, VP Operations, both graduates of the Cornell University Hotel School in Ithaca, New York (see Figure 3).

Figure 2. Properties managed by Cayuga Sustainable Management.

Our hotels & ecoldges are dotted all along the Pacific Coast, forming a trail from the wild Osa Peninsula in the South, to Guanacaste in the North. You can even build-in a visit to Granada, Nicaragua!
Our hotels & lodges are dotted along Central America’s Pacific Coast — from Panama through Costa Rica’s wild Osa Peninsula, up to Guanacaste in the North and on to Nicaragua.

You’ll get to see more of the Pacific Coast by designing the perfect combination of retreats that’s totally you. We’ll show you how.

Source: [https://www.cayugacollection.com/#main](https://www.cayugacollection.com/#main)

Figure 3. Andrea Bonilla and Hans Pfister, owners of Cayuga Sustainable Hospitality.

Source: [https://www.cayugacollection.com/who-we-are/](https://www.cayugacollection.com/who-we-are/)
The main focus of Cayuga Sustainable Hospitality is on maintaining high standards of sustainability via management and operations of the properties which are in the “eco-luxury” category. In fact, Cayuga claims to “redefine the symbiosis of luxury and sustainability” in a new way that is more holistic (Cayuga, 2017a). To Cayuga, the guilt-free luxury lodging means replacing air conditioners with fans and natural breeze, disposable shampoo and soap with refillable organic and biodegradable products made locally from natural ingredients, energy-intensive Jacuzzis with cool showers in private outdoors bathrooms (Cayuga, 2017a), or simply saying ‘no’ to unsustainable requests from tourists, like serving bottled water or endangered tuna (Elliott, 2012). Cayuga’s focus is on authentic experience and unique natural and cultural attractions offered by the destination where guests can connect with nature, learn about the Costa Rican culture, relax and revitalize in tropical settings very different from their own. Each of the nine properties managed by Cayuga has a variety of sustainable projects that give back to their communities and are relevant to their immediate local context. From the perspective of economic sustainability, the Cayuga Collection generates about $15 million (US) and employs over 400 local residents (Cayuga, 2017b). Additionally, the management company maintains overarching projects pertaining to larger issues such as sustainable seafood, water and waste reduction.

Latitude 10 Exclusive Beach Resort is among the properties managed by Cayuga Sustainable Hospitality. The resort is located on the Nicoya Peninsula of the Pacific coast of Costa Rica in the remote beach town of Santa Teresa (see Figure 2). It is part of the Cayuga Collection after originally being designed as a summer residence by two friends. The remote location of this small beach resort offers unparalleled visitor experience of luxury and solitude amidst the vibrant tropical rainforest and the lulling sound of the ocean visible from most of the resort. Because the resort is so small and remote, it offers the best in relaxation, romance, surfing, and wildlife, depending on the visitor’s interest. The destination of Santa Teresa boasts some of the best surfing spots in the country with ideal conditions throughout the year, long stretches of pristine and unexplored beaches (see Figure 4), diverse wildlife where the rainforest meets the ocean. As well, on offer are a variety of local flavours in numerous Tico restaurants, and activities ranging from horse riding along the beach to visiting swimming holes or local schools.

Visitors can choose from five open-air private casitas or one guestroom, which are surrounded by wildlife just steps from the beach (see Figure 5). The rates range from $290 to $550 per night during the green season, and $580 to $1,100 per night during the holiday season (latitude10.resort.com, 2017a). Each casita has different local décor, an outdoor shower with locally-made organic soap and shampoo, is completely private and hidden by the lush foliage, and offers the guests unparalleled relaxation experience involving all senses (see Figure 7). Guests have full use of the resort’s salt water pool overlooking the ocean, clubhouse with cocktail bar and variety of spaces to relax under the roof and outside amidst the tropical vegetation (see Figure 6), access to lookout space where guests can request dining or spa services, and rental of bicycles to explore the surrounding area (see Figure 8).
The open air design allows for the breeze and nature sounds to pass through each casita while having the wildlife closer for visitors’ enjoyment. Resident howler monkeys, sloths, magpie-jays, lineated woodpeckers, iguanas, geckos, and Halloween crabs are frequent visitors to the amazement of tourists. Only steps away, the beach is full of more amazing creatures, both on the sands where the forest meets the ocean, and in and above the waves. The beach is visited by Leatherback and Olive Ridley sea turtles during the egg laying season, and it is frequented by sandpipers, plovers and herons. From above, pelicans are often seen flying in V formation and diving into the waves for fish, while the swimming holes are teeming with beautiful creatures from fish and octopus to small decorative sea slugs. Some nights, visitors can see the bioluminescence of plankton near the shore when disturbed by the waves.

Source: https://www.latitude10resort.com/resort-gallery-santa-teresa/
Figure 5. Premium junior suite in one of the open-air casitas.

Source: https://www.latitude10resort.com/resort-gallery-santa-teresa/

Figure 6. The clubhouse with cocktail bar, dining and sitting areas overlooking the pool, and lookout space.

Source: https://www.latitude10resort.com/resort-gallery-santa-teresa/
Figure 7. Locally-made soaps and shampoos, local dish prepared by the chef, and resident howler monkeys.

Source: https://www.latitude10resort.com/resort-gallery-santa-teresa/

Figure 8. Outdoor shower in one of the casitas, and complementary bicycles for guests.

Source: https://www.latitude10resort.com/resort-gallery-santa-teresa/
Approach Used and the Impact

Received Awards

Pfister and Bonilla believe in walking the talk, and this is reflected by numerous awards received by Cayuga over the last few years. Among them is the latest National Geographic World Legacy Award 2017 in the Earth Changers category, in recognition of the “cutting-edge leadership in environmentally friendly business practices and green technology” (National Geographic, 2017). (See Figure 9). Ingenious and efficient sustainable technologies and practices are evident in Cayuga’s mission and are found in every managed property, for example, using only recycled water for garden irrigation, producing biogas to replace propane, heating water with solar panels, replacing plastic water bottles and straws with reusable glass bottles and recyclable bamboo straws, aiding scientific research with Osa Conservation, providing environmental education to children from areas surrounding the hotels via their Earth Equilibrium NGO, and the latest ‘Dock to Dish’ pilot program to partner local fishermen with chefs (National Geographic, 2017).

Figure 9. Winners of the National Geographic World Legacy Award 2017.

In the year prior, Cayuga received the Green Hotelier Award 2016 recognizing properties which have made “the biggest commitments to sustainability with innovative programs that positively impact their people, their community and the planet” (Green Hotelier, 2016). The judging committee pointed to several initiatives implemented by Cayuga, such as the properties’ black water treatment system, innovative approaches to reduce energy consumption, use of renewable energy and water reduction programs, guest education, hotels’ packaging made of organic fibers, Cayuga’s work with Pack for a Purpose organization, support of local healthcare, and strong employee care program with staff advancement examples (Green Hotelier, 2016). Similar recognition from other organizations include the Conde Nast Traveler’s Conde Nast World Saver Award.
received in the category of Small Hotel Chains in 2010 (Cayuga Collection, 2010) and for Poverty Relief Efforts in 2012 (Buchmeyer, 2012), and the Travel & Leisure Global Vision Award in 2010 for Environmental Leadership (Wallace et al., 2010).

Cultural Sensitivity Training at Latitude 10: The Current Dilemma

Due to the exclusive nature of Latitude 10 and the key aim of sustainability, the focus is always on top quality service. The interpretation of “quality service,” however, tends to be contentious, especially when cultures, lifestyles and expectations clash in effort to deliver it. The “Tico” (Costa Rican) lifestyle of “pura vida,” which means pure life, truly encompasses the local philosophy of enjoying life to the fullest and taking it slow. Many Costa Rican staff reinstate their satisfaction with the easy-going lifestyle, being close to family and friends, and living in a beautiful country which they clearly love and are proud of. Place in this context the ever-so-rushed and time-sensitive North American or European visitor spending US $580 to $1,100 per night during the busy season (latitude10.resort.com, 2017a), and you are sure to have conflict.

Not surprisingly, the socio-cultural differences between the western countries and Costa Rican traditions play an important role in the host-visitor interactions. These conflicts present ongoing challenges for managers, and in this case for Sylvia. Additionally, Sylvia has been facing financial and logistical challenges with local employment. High staff turnover is common in Santa Teresa due to seasonality of employment in the area. Consequently, there is a lack of permanent, long-term solutions which would help contribute to employee morale and maintain high quality of service. Much of Sylvia’s time has been spent on training new staff and improving communication within the team. She was continually thinking about her staff and visitors, but also about the expectations placed on her by Cayuga Sustainable Hospitality.

Assigned the responsibility of bridging the socio-cultural gap between local employees and international visitors—thus improving staff morale and quality of service—Andrea Bonilla, the co-owner and VP Operations of Cayuga Sustainable Hospitality, visited Latitude 10 with a bag full of tricks. Over the next few days, she would implement a series of practical staff training workshops and experiential exercises aiming at developing intercultural competence among the staff. These practical exercises were holistically focused on cognitive, emotional and behavioural changes that would further lead to higher satisfaction and quality of service (Landis et al., 2004). The genius of these exercises was grounded in interpersonal communication, including subtler forms of body language and facial expressions which was invaluable for communicating with tourists without the actual language.

Even before stepping into the resort, Andrea called everyone to meet her outside. Without any icebreakers or introductions, all staff and management rushed to the front gate and congregated on the narrow dirt road in front of the eco-resort. They didn’t know at the time, but this first experience was designed to present staff with the perspective of the visitors as they arrive to Latitude 10.

The first question posed by Andrea seemed to sink in, “What is the first thing that you notice? Look around. Imagine taking a plane from a major city, being picked up at the airport and then driving down this dirt road surrounded by the dense rainforest with new sights and sounds you don’t have in a big city.” Still silence.

Another question, “Where do you see the name of the eco-resort?” Point taken! The small sign was completely obscured by vegetation, as was most of the entrance gate. (See Figure 10).
“Let’s go inside and pretend I am a tourist.”

Once again, everyone returned back into the resort and waited patiently. Finally, after what seemed like a long time, the bell rang in the office. The staff member replied to the call, while simultaneously Sylvia rushed to greet the visitor and the kitchen staff prepared a welcome drink. By the time Sylvia reached the front gate, the van was parked inside and the ‘tourist’ played by Andrea was standing outside and waiting.

More feedback. “Look around. By the time you came to help with my suitcase and offer me a drink, I have been standing here at the back what seems like laundry and work area. The sights, sounds and smells are not what we want our visitors to experience. Also, I waited too long. Someone should open the gate right away and greet me, then take me to meet the manager. While I wait, I’m confused about where I should go. No one spoke to me yet. My entire experience should be LUXURIOUS and RELAXING. What can we do differently?”

This time Sylvia presented several ideas. “We need to change how we do things. We need a more efficient system from the visitor’s perspective.”

“Exactly!” Andrea was clearly pleased and quickly snapped out of her international tourist persona. Shortly after followed greetings with all staff and conversations around the logistics of her stay. Later in the evening, after more conversations with management of the resort, Andrea was working in the office and preparing for the next few days.
The next morning, right after an early breakfast, Andrea and Sylvia were waiting for the staff with big smiles on their faces. Andrea had a big hockey bag laying next to her on the floor and asked everyone to stand in a circle. Immediately everyone was neatly arranged in a big circle and glancing with anticipation at the big bag.

Andrea took out a rubber ball from the bag and addressed one of the staff, “Excuse me, Danielle, would you mind passing this ball to Sylvia, please?” After getting her reply, the first ball would leave Andrea’s hands, then after a pause another ball would be in motion, and so on. Each person would say something similar and polite, then wait for reply, and focus on the next rubber ball.

“Now, imagine you are getting busy and have to speed things up significantly.” This time Andrea tossed the first ball in the same order but without a warning. The staff member missed it and run off to fetch it, while there were more balls already in the air and on the floor. Other staff were yelling one or two words without any pleasantries. The entire scene was stressful, loud and chaotic.

“This is what happens when you get busy. Without systems in place you lose focus, you make mistakes, you don’t communicate with each other, and the overall quality of service goes down tremendously. Let’s sit down and talk about it. How did you feel during the first round versus the second?”

Andrea’s applied learning exercise worked beautifully. Comments, observations and ideas started pouring out from the staff. Everyone understood there is no time for pleasantries during such busy time, and some staff members would compare similar examples in the past when they took things personally, how they felt, and how it affected their level of service. Everything seemed interrelated. Staff members would start proposing solutions as they saw the related issues. Both Sylvia and Andrea seemed very pleased.

This was the climate of the following few days during Andrea’s stay with multitude of similar exercises and workshops designed to make the team more cohesive and efficient. The holistic nature of these exercises was especially relevant in developing intercultural competence among employees from collectivist culture with the aim of providing service to tourists coming from individualist cultures (Landis et al., 2004). After only two days, the morale among employees was significantly improved and all lines of communication were open. You could see and feel the difference. As the co-owner and VP Operations of Cayuga Sustainable Hospitality, Andrea’s work was nearly done. Now Sylvia must continue the work and consider several managerial questions and decision outcomes to implement the changes immediately and with long-lasting results. How can she maintain the quality of service after only a few days of workshops? To make this a lasting change, how can she further empower local staff? How can the management facilitate better opportunities for tourist-staff interactions?

Implications & Lessons Learned

Decision Outcomes (Proposed Solutions)

The intercultural sensitivity training implemented at Latitude 10 over the span of one week started generating impact almost immediately within the team. Over the following weeks and months, the management team continued incorporating the lessons learned into company practices via seamless processes, such as employee training with the added focus on intercultural competence. Broader community issues brought about by the local staff were addressed by inviting tourists to participate in various projects. Major breakthrough during the days of workshops and practical exercises seemed to be found in common understanding of community and family values, extended to individual expectations and cultural perspectives. The impact of such employee
training is evident in continued success of Latitude 10, whether from the perspective of employees (Gardner, 2017, 2018) or travelers, 90% of whom rate the lodge as excellent (tripadvisor.ca, 2019). The company’s reputation is also evident in the category of intercultural understanding (National Geographic, 2017; Green Hotelier, 2016; Buchmeyer, 2012) and positive contribution to the local community informed by grassroots initiatives such as environmental education and library program for elementary schools (earthequilibrium.org, 2019).

From the programming perspective, employees were given the context for understanding the underlying reasons why visitors may engage in travel in the first place. They began recognizing the shared meanings that tourists communicate and interpret during the process of interaction with local staff—i.e., Symbolic Interactionism programming theory (Fennell, 2002). This process occurred between visitors and staff whenever they interacted, each formulating different perceptions and meanings. Staff were able to recognise these perspectives only through the cultural sensitivity training with further guided communication and interpretation. Management at Latitude 10 made effort to bridge the distance between the host and guest in variety of ways. Whenever possible, there were free English lessons offered to local staff to help them communicate better with visitors. There were talented staff members whose talents were displayed and promoted by the manager, as was the case with an artist and a surfer. Equally important, travelers were educated about the local community and invited to participate in various local efforts, such as through the Earth Equilibrium foundation (earthequilibrium.org, 2019).

Social Exchange Theory offers another lens with direct implications to quality service provision and certification among tourism operators (Fennell, 2002). Participation in tourism experience depends on rewards sought by travelers and the attached personal value. The relationship between the customer and provider is maintained as long as the costs do not exceed benefits. Once staff of Latitude 10 began understanding the costs and rewards of the visitors within the context of their individualist cultures, it was easier to anticipate their expectations and understand the importance of receiving good value for their money. The staff also recognised the direct link between the CST certification of Latitude 10 and visitors’ value attached to this effort, which was directly related to their quality training and competitive advantage as staff members of the ecolodge.

The socio-cultural differences between visitors and local employees can be bridged with the use of various Psychological and Social Empowerment perspectives (Scheyvens, 1999). (See Appendix 1). Focusing on Psychological Empowerment of local staff, Cayuga Sustainable Hospitality offered HR training, sustainability certification, specialty training within hospitality and tourism, English lessons, and employee recognition and awards (Cayuga, 2017b; Gardner, 2017; 2018). From the perspective of Social Empowerment, the stability of local community was maintained by offering year-round positions exclusively to local staff and cross-training to avoid seasonal layoffs. Community cohesion in Santa Teresa was no small achievement in rural town where seasonality is common and competition is high. The management team of Latitude 10 was able to incorporate the common goals of the local community into the tourism venture. Consequently, community-based projects became meaningful tourism experience for its guests who could now visit local schools, as one example, and contribute via its Equilibrium foundation (equilibrium.org, 2019). This financially important and ethically meaningful approach made sure that raised funds from individual visitors were applied to community development projects deemed a priority by the hosts.
The quality of local experiences for both hosts and guests depends on the delicate balance between tourist impact and local perceptions. The Typology of Tourists and Influence Upon the Community (Font, 1995; Smith, 1990) can serve as a useful tool to evaluate managerial actions that would ensure socio-cultural sustainability. (See Appendix 2). Management of Latitude 10 has used the intercultural competence training of their staff to inform more positive local perceptions of travelers, and also educate travelers about the local community prior to and during their stay. Equally important, by inviting travelers to participate in locally meaningful projects designated by the community, the management of Latitude 10 helps travelers create positive impact, and therefore also positive local perceptions. This relationship-building is further strengthened by sustainable management practices pertaining to the low number of tourists at the ecolodge, the focus on attracting responsible travelers, and the travelers’ full adaptation to local norms—including those added by Cayuga Sustainable Hospitality, such as eliminating plastic or removing threatened fish species from its menu (Elliott, 2012; latitude10resort.com, 2019). Although an interesting combination of luxury and sustainability, Latitude 10 Exclusive Beach Resort maintains the delicate balance between visitors and hosts by implementing the three lenses of people, planet and profit of sustainability; cultural sensitivity training being only one of many such approaches.

**Discussion Questions**

**Managerial Questions/Problems**

1. Has the manager of Latitude 10, how would you improve the quality of service? How would you reconcile different expectations pertaining to service quality? How would these expectations differ among the local staff compared to international tourists?

2. Has the manager of Latitude 10, how would you improve employee morale? How would you manage local issues which are present in Santa Teresa? For example, high turnover of employees due to seasonality of employment.

3. Has the manager of Latitude 10, how would you minimise the cultural clash between international tourists and local staff, pertaining to service quality expectations? What can you do to help local staff understand international tourists?

4. Has the manager of Latitude 10, how would you devise and implement long-lasting solutions?

5. In all of these considerations above, what is the role of the General Manager of Latitude 10? What is the role of the VP Operations of Cayuga Sustainable Hospitality?
References


Appendix

Appendix 1. Psychological & social empowerment/disempowerment perspectives.

**Psychological**

<table>
<thead>
<tr>
<th>Empowerment</th>
<th>Disempowerment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced self-esteem due to outside recognition of the value and uniqueness of host culture.</td>
<td>No sharing of benefits from tourism.</td>
</tr>
<tr>
<td>Increased confidence promotes further education and training.</td>
<td>Hardships due to reduced access to resources now in demand by visitors (e.g., protected areas).</td>
</tr>
<tr>
<td>Increase in status, especially among women and youth.</td>
<td>Result: some groups confused, frustrated, uninterested or disillusioned with the tourism initiative.</td>
</tr>
</tbody>
</table>

**Social**

<table>
<thead>
<tr>
<th>Empowerment</th>
<th>Disempowerment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism maintains or enhances the stability of local community.</td>
<td>Disharmony and social decay.</td>
</tr>
<tr>
<td>Community cohesion a result of common goals and work in the tourism venture.</td>
<td>Members take on outside values (e.g., materialism) and lose connection with traditional culture.</td>
</tr>
<tr>
<td>Raised funds applied to community development projects, e.g., school, roads.</td>
<td>Some members (e.g., women) do not share equitably the benefits from tourism.</td>
</tr>
<tr>
<td></td>
<td>Certain groups compete with one another – jealousy and resentment.</td>
</tr>
</tbody>
</table>

Source: Scheyvens (1999)
Appendix 2. Typology of tourists and influence upon the community.

<table>
<thead>
<tr>
<th>Type of tourist</th>
<th>Number of tourists</th>
<th>Adaptations to local norms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Explorer</strong></td>
<td>Very limited</td>
<td>Accepts fully</td>
</tr>
<tr>
<td><strong>Elite</strong></td>
<td>Rarely seen</td>
<td>Adapts fully</td>
</tr>
<tr>
<td><strong>Off-beat</strong></td>
<td>Uncommon but seen</td>
<td>Adapts well</td>
</tr>
<tr>
<td><strong>Unusual</strong></td>
<td>Occasional</td>
<td>Adapts somewhat</td>
</tr>
<tr>
<td><strong>Incipient mass</strong></td>
<td>Steady flow</td>
<td>Seeks W. amenities</td>
</tr>
<tr>
<td><strong>Organised mass</strong></td>
<td>Continuous influx</td>
<td>Expects W. amenities</td>
</tr>
<tr>
<td><strong>Charter</strong></td>
<td>Massive arrivals</td>
<td>Demands W. amenit’s</td>
</tr>
</tbody>
</table>

Source: Font (1995), adapted from Smith (1990)

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What is the CST?

It is a program that aims to categorize and certify tourism companies according to the degree to which their operation approaches a sustainability model. For this, four fundamental areas are evaluated:

1. **Physical-biological environment**
   Evaluates the interaction between the company and the surrounding natural environment, interested in the implementation of policies and programs of sustainability, protection of the environment, among others.

2. **Service plant (This area corresponds to Hosting Establishments)**
   Aspects related to the company's internal systems and processes are evaluated in terms of waste management and the use of technologies to save electricity and water.

3. **Service management (This field corresponds to Tour Operators Agencies)**
   It comprises the process by which the company, considering all the exogenous and endogenous elements, designs a tourism product in accordance with the market trends and the characteristics of the country and the locations where the product will be operationalized.

4. **Socioeconomic environment**
   The identification and interaction of the establishment with the adjacent communities is evaluated, analyzing, for example, the degree to which tourism companies respond to the growth and development of the region, through the generation of employment or the achievement of benefits in favor of the community.
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Chapter Summary

This case study describes the methods associated with the development and completion of a comprehensive Corridor Management Plan based upon the collaborative efforts of a wide range of stakeholders. The notion that critical issues NH is facing are not about achieving growth, but rather one of maintaining quality that is consistent with sustaining natural/coastal, cultural and human resources of NH Seacoast. This chapter documents some unique strategies for engaging stakeholders, the value of replication, the importance of innovation in research design and techniques that assist in the implementation of the recommendations derived from the process. The recommendations were derived through the consideration of the input from a diverse group of stakeholders—from both within and outside the corridor—with an interest in enjoying and preserving its preservation and enhancement as a tourism destination.

Stakeholder engagement provides the foundation necessary for planners, managers and policy makers to identify and implement management and policy actions necessary for sustainable tourism development that incorporate appropriate approaches to both the management and protection of coastal resources, regional economic development, and community problem solving. It is often difficult and time-consuming to involve an array of stakeholders in the planning process; this involvement. As demonstrated through this case study, stakeholder engagement has significant benefits for enhancing the sustainability of coastal corridors. In particular, participation by multiple stakeholders with differing interests and perspectives support consideration of the varied social, cultural, environmental, economic and political issues affecting sustainable development (Bramwell & Lane, 1993).

This study provided important information about visitors to the corridor for resource managers, planners, small business owners and service suppliers to incorporate this data into the scenic byway planning and decision making process. In addition, the study utilized a variety of stakeholder engagement strategies and replicated a study completed nearly 20 years ago. The study also highlights some innovative approaches to engage and communicate with stakeholders and a tool to ensure the implementation of the recommendations intended to enhance the sustainability of the destination. This study, designed through this stakeholder driven collaborative process, identified and investigated the many and varied factors that influence the relationships (or fit) between the tourism resources and visitor demand, resident concerns, protection of coastal resources and management challenges in order to have a more complete understanding of the concept of a “quality tourism destination.”
Learning Objectives:

The focus of this case study is the process and outcomes from the development of a corridor management plan for the New Hampshire Route 1A/1B Scenic Byway Corridor. The lessons learned are a result of the many interactions between stakeholders and the plan development team. It serves as a vehicle for sharing and applying the knowledge gained through the collaborative activities associated with the design, development and implementation of the comprehensive corridor management plan to other “real world” situations. It also provides the opportunity to learn the capacity to think analytically and objectively and to gain skills in projecting outcomes. When you know where you are headed, you can more easily get there. Collaborative Corridor planning is increasingly important for sustainable tourism planning in tourist destinations. There are many definitions of collaboration. A practical, operational definition applicable to the context of sustainable tourism development: collaboration is the process of facilitating and operating in multi-organizational arrangements to solve problems that cannot be solved or easily solved by single organizations. Collaborative means to co-labor, to cooperate to achieve common goals, working across boundaries in multi-sector relationships. This process seeks to involve the multiple stakeholders affected by tourism, including environmental groups, business interests, public authorities, tourists, local residents and community groups. A stakeholder is defined here as ‘any person, group, or organization that is affected by the causes or consequences of an issue.”

Upon reading this case study, the learner should be able to understand the importance of collaboration to the development of a corridor management plan, as well as specific approaches to engaging stakeholder relative to sustainable tourism destination development. This case study will stress the value of replicating or revisiting previous collaborative efforts and the importance of innovation and experimental research designs in this process. Finally, this case study describes an approach to help ensure that outcomes and recommendations from a collaborative corridor management plan are implemented. More specifically, the learning outcomes focused on the following five topics:

1. Collaborative Corridor Planning. This case study will examine the process, tools, challenges and benefits associated with actively engaging a wide range of stakeholders necessary to establish the collaborations to prepare and implement the New Hampshire Coastal Byway Corridor Management Plan. Learners will understand and be able to summarize the role of the collaborative corridor management plan development process utilized to integrate tourism destination development with the sustainable management of coastal resources, as well as transportation and community planning necessary to facilitate the sustainable use and development of the NH Route 1A/1B Scenic Byway Corridor.

2. Managing Stakeholder Engagement in the Collaborative Corridor Management Planning Process. This is the process of communicating and working with stakeholders to meet their needs and expectations, address issues as they occur, and nurture appropriate stakeholder engagement throughout the project like cycle. This case study describes the various techniques utilized to engage stakeholders to collaborative corridor planning. A key benefit is that it allows the plan development team to increase support and minimize resistance, significantly increasing the chances to achieve project success. Learners will be able to understand alternative and innovative stakeholder engagement and communication strategies relative to cost, value, learning outcomes and ease of implementation.

3. Importance of Replication Research. This case study communicates the advantages and challenges of replicating previous prior management and planning activities focused on the NH Route 1A/1B Byway Corridor. Replication refers to being able to reproduce a procedure or approach. Scientific investigations
need to be replicable for many reasons. It allows scientists to discover errors know that the information is accurate and that the results will be reliable. If an investigation is replicable, somebody else can use it the approach with confidence.

4. **Innovations and Experimental Research to Enhance Corridor Management Plans.** Over the past decade and a half there have been a wide range of technological advances that have provided “new approaches/tools” (i.e., email surveys, interactive web-sites, list serves, etc.) to collect and share information with the public and a wide range of stakeholders groups. Likewise, there have been numerous challenges to the successful engagement of stakeholders in corridor management. Response rates to general population survey continue to decline. Another challenge is the sheer number of stakeholders in multi-jurisdictional corridors that brings with it the very difficult decision relative to deciding who the “right” stakeholders are and the costs and difficulties associated with engagement that need to be balanced against the benefits of stakeholder involvement. Once the decisions about who the “right” stakeholders are, than “time” becomes a central issue. Both the “time” commitment required of the stakeholder, who often have many other professional and personal obligations and the impact of actively engaging stakeholder’s impacts on the projects deadlines. Yet another challenge to the effective engagement of stakeholders, is defining the relative value of different stakeholder input.

5. **Implementation of Recommendations.** There are many challenges facing “implementation” of specific recommendations drawn from the completion of multi-jurisdictional corridor management plans. The corridor management plan documents what has changed and what has stayed the same relative to natural, historic resources, tourism infrastructure (i.e., restaurants, lodging and attractions) and summarizes the input provided by residents, stakeholders and the intercept survey sample of visitors (i.e., characteristics, behaviors, attitudes, opinions and desires) in the NH Route 1A/1B Scenic Byway/Corridor. The case study highlights a general rubric for the implementation of recommendations drawn from the corridor management plan. This rubric provides a tool to identify and prioritize what should be done and who should do it.

**The Issue, the Opportunity and the Trends**

This section will provide an overview of the issues, opportunities and trends that are addressed in this case study. These include a discussion of the important issue of collaboration; the opportunity to replicate previous research conducted in the same setting across two time periods; and trends of stakeholder engagement in both the communication and implementation of the results.

**The Issue**

In 2010, at the request of six corridor communities and the Hampton Beach Area Commission, the Rockingham Planning Commission applied for planning grant funds from the National Scenic Byways program to revisit and update the Corridor Management Plan. This revision incorporates the results of recent local and regional planning efforts, and engage community residents and a range of other stakeholders in evaluating new opportunities for and threats to the corridor and updating management priorities. Federal funds for the project were secured with assistance from the Congressional delegation, along with toll credit match from the New Hampshire Department of Transportation.

**The Opportunity**

The Rockingham Planning Commission, in partnership with the NH Office of State Planning, and the University of New Hampshire Tourism Planning and Development Program developed the original Corridor Management Plan for the Byway in 1995-1996. The original 1996 planning process included an extensive public participation
component, including a series of community meetings, a survey of corridor community residents, and extensive surveying of visitors to the corridor as part of a Tourism Needs Assessment. A nearly identical public process has been used for this update. Many of the recommendations from the 1996 Management Plan have been implemented over time, from construction of a shoulder bicycle route on the Pioneer Road segment of Route 1A, to reconstruction of Foye’s Corner, to the redesign of the Hampton Beach Sea Shell complex.

The Trends
Over close to two decades coastal development, growing use of the route for walking and bicycling, increased visitation, the introduction of new and very popular recreation activities (i.e., standup paddle boarding, surfing, beach yoga) and other factors have brought new challenges for the Byway. Unfortunately, the National Scenic Byways Program as a stand-alone source of Federal grant funding for state and local byway planning initiatives were eliminated with the most recent Federal transportation authorization legislation passed in 2012, known as MAP-21. Scenic Byways was one of four separate Federal funding programs consolidated into the new Transportation Alternatives Program (TAP). While there no longer exists a separate pool of Federal funding for byway improvements, most of the benefits of Byway designation are unchanged. Designation as a Scenic Byway continues to have value in assuring travelers of a high quality visitor experience, and byways in New Hampshire continue to be promoted by the New Hampshire Division of Travel and Tourism (NHDTTD). Equally, important, in the face of limited state and federal transportation resources, transportation improvement projects that were considered regional priorities and have been identified through multi-town corridor-based planning efforts carry extra weight in the highly competitive statewide funding selection process. Since the time of first study new technologies for engaging and communicating with stakeholders have been developed and more data is available than ever before for visitors, residents and government officials.

The Innovation
Case Context
The setting for this study is the New Hampshire Coastal Scenic Byway, designated in 1994, by the Scenic and Cultural Byways Council (so authorized by the NH State Legislature in 1992). The Byway extends 21.8 miles from Seabrook to Portsmouth, traversing six communities along NH Routes 1A and 1B and covering the entire length of New Hampshire’s Seacoast. While the population of the six corridor communities is approximately 56,000 with the greatest population densities located at opposite ends of the corridor (i.e., Portsmouth and Hampton Beach). The NH Seacoast is the destination for an estimated 7.65 million visitor trips annually, and the Byway connects many of the Seacoast’s major visitor destinations.

The Byway Corridor characterized by spectacular views of the Atlantic Ocean across rocky and sandy shores on one side and lined by turn-of-the-century estates on the other. Highly developed commercial and residential areas serving both tourists and seasonal residents are interspersed throughout the length of the corridor. The Byway includes a broad range of historic, cultural, natural, scenic and recreational resources that shape the experience of both visitors and seasonal and year round visitors. These include 10 units of the NH State Park System, from Hampton Beach State Park to Fort Constitution. Natural resources from Gulf of Maine tide pools to the extensive salt marsh ecosystem of the Hampton- Seabrook Estuary, and Great Bay National Wildlife Refuge. The natural resources found along the by-way corridor are an important contributor to the scenic character and economic value of the area.

Natural resources provide habitat for an abundant variety of wildlife, support local economies, and offer recreational opportunities for all to enjoy. The corridor also has an enormous range of historic resources ranging from colonial settlements to World War II era fortifications, and miles of scenic coastline with varied recreational opportunities and interpretive installations. On a less positive note, the best available peer reviewed research on climate change projects that rising sea levels and increasingly frequent severe storms
will exacerbate problems with coastal erosion and subject significant portions of the corridor to frequent if not routine inundation. At the same time, decisions on infrastructure investments made now must begin to account for this potential future, such that potential climate change impacts that may not be seen for decades to come. In the nearer term, the value of addressing coastal hazards in planning for Byway infrastructure was underscored by observed impacts from increasingly frequent severe storm events in recent years.

**Stakeholders Involved**

There was a wide range of stakeholders to the development of the New Hampshire Coastal Byway Management Plan. A stakeholder is a person who has something to gain or lose through the outcomes of the corridor planning process. In many circles, these are referred to as interest groups and they can have a powerful bearing on the outcomes of political dimension of the corridor planning process. A major focus of the corridor planning process was identification and communication with stakeholders in this study. This was due mostly to the fact that the corridor management plan bridges economic development, community quality of life, tourist destination enhancement and quality, transportation, a unique and valuable coastal environment, regional planning and policy. Care was taken to actively engage and communicate with all parties with a stake in the corridor planning process, those who make or implement policy, and the intermediaries between them. The engagement with stakeholders continued throughout the corridor planning process. The following bulleted list serves to identify stakeholders associated with the NH Coastal Byway Corridor Management Plan:

- **Federal Government.** At the federal level, over forty-three departments, agencies and programs have management or policy responsibilities. Those most active in federal involvement in NH’s Coastal Corridor include the Federal Highway Administration, the National Oceanic and Atmospheric Administration; the U.S. Environmental Protection Agency (USEPA); the U.S. Army Corps of Engineers; the Federal Emergency Management Agency; Department of Defense (Portsmouth Naval Shipyard), the Department of Transportation (U.S. Coast Guard) and the Department of Energy (Seabrook Nuclear Power Plant).

- **State Government.** At the state level, there are over twenty departments, divisions, or programs responsible for the management and/or development of NH’s Coastal Corridor. Those most actively involved include: the Division of Parks and Recreation, NH State Senate, NH House of Representatives, NH Executive Council, NH Governor, N.H. Department of Homeland Security and Emergency Management; NH Division of Travel and Tourism; NH Coastal Program; the Department of Fish and Wildlife Resource; the Water Supply and Pollution Control Division; the Wetlands Bureau; the Sea Coast Science Center, and UNH’s Jackson Lab and the University of New Hampshire and UNH Cooperative Extension.

- **Regional Organizations.** There are at least four regional organizations responsible for planning for the management and development of New Hampshire’s Coastal Corridor. Those agencies most active in the coastal corridor are the, Rockingham Planning Commission, Rockingham County Conservation District, The Coastal Risks and Hazards Commission, Coastal Economic Development Commission, and the Rockingham Metropolitan Planning Organization.

- **Local Government.** There are six communities located within the Corridor. Each has elected officials (Board of Selectman, Town or City Council), planning boards, zoning boards of adjustments, police departments, fire departments, school districts and highway departments.

- **Non-Profits.** There are over twenty non-profit organizations with interest in various facets of coastal resource management within New Hampshire Coastal Corridor. Those organizations most active in the coastal corridor include the NH East Coast Greenway, NH Wheelmen, Greater Portsmouth Chamber of Commerce, the Hampton Beach Area Commission, NH Greenway-Seabrook Rail Trail, NH
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Association of Conservation Commissions; Friends of Odiorne Point; NH Association of Historical Societies; and others.

- **Private Sector.** Many different businesses have a vested interest in the social and natural resources of NH’s Coastal Corridor. These businesses include the Business and Industry Association; NH Charter boat Operators; Isle of the Shoals Steamship Company; Sea Coast Council for Tourism; Public Service of New Hampshire; Sprague Energy; Granite State Minerals and NH Restaurant and Lodging Association. These businesses and professional associations function under a wide variety of mandates dependent upon the focus of the specific industry involved and their link to coastal resources.

- **Residents of NH Coastal Corridor.** Residents of the six coastal communities within the NH Coastal Corridor are important stakeholders to the plan development process. Residents include year round, seasonal, residents who own their own home and those who rent. All have a significant stake in the management of the coastal corridor.

- **Visitors to NH Coastal Corridor.** People visit NH’s Coastal Corridor from a variety of places to participate in a variety of activities, all of which effect how they use and evaluate the management of the coastal resources. Many visitors come from within the state of NH while others visit from New England and the Northeast. While still others come from countries around the world. They visit to the corridor to participate in a wide range of activities.

**Approach Used and the Impact**

This section details the goals, approaches and the innovations utilized in the completion of a comprehensive corridor management plan. The purpose of the Corridor Management plan is to establish community-based goals and implementation strategies to preserve and highlight the scenic, cultural, natural, historic, recreational and archaeological qualities that make the NH Route 1A/1B Byway Corridor special. The goals of this plan were pretty much the same as those defined in the original 1996 Plan. Generally, the goals were identify improvement to enhance the livability of the corridor and to ensure existing roadway and other infrastructure including planned improvements, are resilient to coastal hazards, and anticipated impacts of climate change and highway safety.

This section of the paper begins with a description of the tools used to identify and engage stakeholders; a description of the application of specific collaborative or engagement tools. The first step of the 20-month long process of developing the Corridor Management Plan was the establishment of a Corridor Advisory Committee (CAC) to oversee the project and provide guidance on policy issues. Table 1. provides an overview of the makeup of the CAC relative to geographic scale, the general type of stakeholder and the specific job title of the stakeholder volunteering to serve on the CAC.
Table 1. Makeup of the Corridor Advisory Committee.

<table>
<thead>
<tr>
<th>Geographic scale</th>
<th>Type of stakeholder</th>
<th>Stakeholder</th>
<th>Job title of stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>STATE</td>
<td>Government</td>
<td>NH Division of State Parks and Recreation</td>
<td>State Planning and Development Specialist</td>
</tr>
<tr>
<td></td>
<td>Government</td>
<td>NH Department of Transportation</td>
<td>Director Maintenance District 6</td>
</tr>
<tr>
<td></td>
<td>Elected Official</td>
<td>NH State Senate</td>
<td>NH STATE SENATOR (Northern Area)</td>
</tr>
<tr>
<td></td>
<td>Elected Official</td>
<td>NH State Senate</td>
<td>NH STATE SENATOR (Southern Area)</td>
</tr>
<tr>
<td>REGIONAL</td>
<td>Business Community</td>
<td>Hampton Area Chamber of Commerce</td>
<td>President of Hampton Area Chamber of Commerce</td>
</tr>
<tr>
<td></td>
<td>Business Community</td>
<td>Portsmouth Area Chamber of Commerce</td>
<td>President of Portsmouth Area Chamber of Commerce</td>
</tr>
<tr>
<td></td>
<td>Business Community</td>
<td>Coastal Economic Development Corporation</td>
<td>Managing Director</td>
</tr>
<tr>
<td></td>
<td>Environmental Community</td>
<td>Seacoast Science Center</td>
<td>Executive Director</td>
</tr>
<tr>
<td></td>
<td>Environmental Community</td>
<td>NH Seacoast Greenway</td>
<td>Chair Advisory Committee</td>
</tr>
<tr>
<td>LOCAL</td>
<td>Planning Professional</td>
<td>City of Portsmouth</td>
<td>Director of Planning</td>
</tr>
<tr>
<td></td>
<td>Elected Official</td>
<td>Town of New Castle</td>
<td>Member Town Board of Directors</td>
</tr>
<tr>
<td></td>
<td>Appointed Official</td>
<td>Town of Rye</td>
<td>Planning and Zoning Administrator</td>
</tr>
<tr>
<td></td>
<td>Elected Official</td>
<td>Town of Rye</td>
<td>Vice-Chair Rye Board of Selectman</td>
</tr>
<tr>
<td></td>
<td>Appointed Member</td>
<td>Town of North Hampton</td>
<td>Appointed by Board of Selectman</td>
</tr>
<tr>
<td></td>
<td>Elected Official</td>
<td>Town of Hampton</td>
<td>Member Hampton Planning Board</td>
</tr>
<tr>
<td></td>
<td>Appointed Official</td>
<td>Town of Seabrook</td>
<td>Chair Seabrook Conservation Commission</td>
</tr>
</tbody>
</table>
Table 2 provides a brief overview of the various tools used to support the collaborative corridor planning and stakeholder engagement tools used in the comprehensive corridor plan development process. It describes the activity or the event and the specific activity.

Table 2. Approach to collaborative corridor planning and stakeholder engagement used in the collaborative planning process.

<table>
<thead>
<tr>
<th>Activity-Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establishment Corridor Management Project Development Teams of the Rockingham Planning Commission (RPC) Team and University of New Hampshire (UNH)</td>
<td>The Project Manager and Senior Transportation Planner led the RPC Team. The RPC Team also included the GIS Coordinator and Senior Planner, a GIS Specialist, a Regional Planner, a Transportation Program Manager and two interns. The UNH Team included the Principal Investigator for Tourism Study, a student intern leader and ten undergraduate interviewers.</td>
</tr>
<tr>
<td>Establishment of Corridor Advisory Committee</td>
<td>Establishment of the Coastal Advisory Committee (CAC) see table one for description of CAC membership.</td>
</tr>
<tr>
<td>Public Meeting to Announce the beginning of Corridor Planning Process and the Membership of the CAC</td>
<td>This public meeting served to introduce the Study Teams and the CAC. Both the RPC Team and UNH Team presented overviews of the process and outcomes of the 1996 Corridor Management Plan.</td>
</tr>
<tr>
<td>Thirteen CAC Meeting held at various locations around the Corridor</td>
<td>The meetings between the CAC and the RPC and UNH Teams to update the CAC and respond to concerns and challenges. These meetings were announced and were open to the public.</td>
</tr>
<tr>
<td>On-Line Community Resident Survey</td>
<td>The resident survey as designed to elicit resident’s views on additional development in the corridor, problems/areas needing improvement, suggested scenic pullovers, and a means for preserving and enhancing tourism. The survey included many questions used in the original 1996 study as well as adding new section to get at emerging issues. The survey was distributed to local residents via City and Town websites, notices on local public access cable television and articles in local newspapers; and email lists for local planning boards and community organizations. Paper copies of the survey were available on request. A total 525 surveys were returned. The results were used to help determine preliminary recommendations to be included in the final plan.</td>
</tr>
<tr>
<td>Three Community Meetings</td>
<td>Three community meeting were held in Rye, Portsmouth and Hampton. Each meeting began with an overview of the Byway and findings from the surveys, but mainly focused gathering input from community residents and business owners on local concerns about the corridor and priorities for protections and/or improvements.</td>
</tr>
</tbody>
</table>
The intercept survey provided the information needed to gain a preliminary understanding of where people visiting the NH Route 1A/1B Corridor come from, what they do, how they learned about the site, and how visitors evaluate site attributes (i.e., restroom, parking, value, safety, etc.) as well as their overall tourist experience in the NH Route 1A/1B Visitor Experience. A decision was made to use iPads to administer the on-site intercept interview as opposed to pen, paper and clipboards (method used in the 1996 Study). This use of iPads allowed the questions to appear on the iPad and the visitors answers to be entered by interviewer and saved on the I Pad. The iPad Application allowed for a completely anonymous interview, unless the person provided their name and email contact information for the follow-up survey. A grand total of 3,030 interviews.

The inventory was accomplished in three steps. The first step was the compilation of available Excel spreadsheets from the inventory completed in the 1996 study. This data will be the baseline of the updated inventory. The second step of the inventory process was to complete a systematic search and content analysis of web resources (i.e., websites, social media, and other online resources). The third step was to “ground truth” the information collected via the first two steps and to compile a photo log of the tourism resources of entire NH Route 1A/1B Scenic Byway.

Data to highlight key issues and shape recommendation in each of the resource inventories (i.e., Historic, Natural Resources, Scenic Resources), the zoning and land use assessment and the transportation system assessment were drawn from secondary sources. These include local community master plans and zoning ordinances, the Conservation Plan of New Hampshire’s Coastal Watersheds, a Science Panel report for NH Coastal Risks and Hazards Commission and historic resource inventories developed by the NH Division of Historic Resources and local heritage commissions to name a few. New field data were collected for the Scenic Resources inventory as well as automobile and bicycle/pedestrian traffic counts and roadway condition assessments.

The intercept-survey was used as a mechanism of identifying visitors willing to complete a more detailed web follow-up questionnaire. It also provides a brief overview of the methods utilized in the social media (Facebook) component of this study. Seventeen percent (n=507) of the people who answered the very last question of the iPad Intercept Interview (n=3007) agreed to
complete a follow up survey. Of those 25% (n=123) decided not to provide their name and email address when asked for that information. This occurred for a variety of reasons (e.g., decided they did not want to, changed their mind, could not remember email address, etc.) when asked. Leaving a total of 384 participants in the intercept survey who provided an email address. The more detailed follow up survey was distributed and 15 percent (n=56) bounced or were otherwise undeliverable, leaving three hundred twenty-eight (n=328) number of live email addresses.

**Implementation Plan**

Each chapter of the management plan contains numerous recommendation for NH Coastal Byway. Many public and private organization will have to be involved to the specific recommendation. A meeting of CAC was held and included additional stakeholders. Over 47 specific recommendations in 9 categories were included as part of the “Corridor Management Plan”. Each of these identified the “Issue,” “the approach,” “the recommendation,” “the proposed implementing bodies—with the lead in bold,” “the proposed time,” “the level of difficulty—High/Med/Low,” “Impact—High/Med/Low,” and ‘the CAC priority rating on 5 point scale.”

**Implications & Lessons learned**

This section will conclude by highlighting the implications and lessons associated with each of the “Learning Objectives” set out for this case study. Examples drawn from the development of Collaborative Corridor Management Planning process of the New Hampshire Route 1A/1B Byway Corridor.

1. **Collaborative corridor planning.** The collaborative corridor planning process for the NH Route 1A/1B Scenic Byway began with the 1996-1997 Corridor study. A review of the extensive academic literature on collaboration defines collaboration as (1) the pooling of appreciations and/or tangible resources, (i.e., money, information, labor, etc.), (2) two or more stakeholders, (3) to solve a set of problems, which solve individually (Gray, 1989). These three characteristics were present in the development of the initial corridor management plan and the trust and mutual respect established in the first plan carried into the revision of management planning process nearly 20 years later. The principal collaborators were the Rockingham Planning Commission (RPC) and the University of New Hampshire’s Tourism Planning and Development program. RPC contacted the UNH contact and scheduled met to talk about the general plan. The funding source (NH Department of Transportation) required that the Visitor Survey and Tourist Inventory go to competitive bid. Due the amount of funding available, no other organization submitted a bid to complete the project. The RPC brought the skills and organizational framework necessary to complete the corridor development plan. UNH brought expertise in research design, access to student labor and technological resources.
The importance of sharing jointly defined risks and responsibilities is critical to success and increases the likelihood that the goals can be met. Though not a significant barrier to this project, there are three common barriers that might impede collaborative efforts or working together of agencies and educational institutions are time, trust and turf. Collaborative efforts take time to develop. Short-term, collaboration will take more time and effort than providing services independently; however, long-term it will save time (Wondolleck and Yaffee. 2000). Turf issues surface when an imbalance, perceived or real, of benefits to the collaboration partners occurs. For example, one town might view that another town reaps more benefits from the collaborative effort; or, one agency takes on less responsibility, or has more decision making power. Partners do not see each other as equally involved in benefiting of the collaboration. Turf issues were not present in this project for the primary reason that a majority of the key stakeholders and members of the Corridor Advisory Committee had collaborated on a variety of different topics over the years, including collaborating on 1996. A lack of trust often becomes a barrier in collaborative efforts. There was a high level of trust between all of the participants in the project. For example, one member of the CAC, a State Senator, would not commit to serving on the 2013-2014 committee without documentation of the “outcomes” associated with CMP. This provided an opportunity for RPC to provide a detailed listing of the recommendations that had been implemented and positive outcomes associated with those initiatives as a result of the 1996 CMP. In addition, RPC staff included a section entitled “Status of 1996 Management Plan Recommendations” at the beginning of each Chapter of the 2014-2015 Management Plan.

2. **Managing stakeholder engagement.** Effective and equitable corridor development plans, programs and policies require that the public and stakeholders understand the specifics of proposed initiatives, programs and policies. Likewise, managers and policy makers must understand what the public and stakeholders know and think about specific policies/programs and/or how various communities of interest could impact the program management or policy development process (Hartley, Gagne, and Robertson, 2008; Hartley and Robertson, 2007; Dillman, 2014). It is important to pay specific attention to understanding and the further specification of the many factors that influence an individual’s motivation and to be open to two-way communication and to process elaborate on information (i.e., source, message, recipient, and context factors). This work was built on the growing volume of research focused on the role technology plays in engagement and two-way communication (see Hartley, Cagney and Robertson, 2007; Robertson, et.al. 2002, Hartley and Robertson, 2007).

Corridors are difficult to manage because of the wide range of stakeholders and the diverse perspectives relative to the specifics of how the corridor should be managed. One way of managing stakeholder engagement was through mixing up the location of the Coastal Advisory Committee. Over the course of study a wide range of non-profits and community-based organizations hosted meetings of the CAC. New Castle Public Library; Hampton Historical Society’s Tuck Museum; the Urban Forestry Center; North Hampton Town Hall; Seacoast Science Center at Odiorne Point State Park in Rye; Wentworth-Coolidge Mansion State Historic Site; Hampton Beach at the new Sea Shell complex; Discover Portsmouth Center; and the Rye Public Library. Not only were they great hosts but they shared some of the history of their location as well as their vision for the Coastal Corridor. It also served as an opportunity for the CAC to get a firsthand look at the diversity within corridor. A variety of tools were utilized to actively involve and engage stakeholders. The stakeholder engagement tools described in Table 2 served to reach out to specific stakeholders and to incorporate their perspective into the comprehensive corridor planning process. The Impact of the stakeholder engagement process associated with this project is ultimately best measured by the many recommendations and the implementation of those recommendations. Forty-
seven detailed recommendations were identified through the combined use of these tools and the identification of an implementation/prioritization structure.

3. **Importance of Replication and Comparative Research.** This project provided the opportunity for comparative and quasi-experimental designs focused on research investigating and evaluating these new approaches or methods for engaging and communicating with the public and stakeholders. The replication of study completed nearly 20 years ago provides the opportunity for both comparative research and experimental designs that are incorporated into applied research projects necessary to complete the New Hampshire Byway Corridor Management Plan. These activities target the public and stakeholders that could lead to concrete suggestions for improving the quality of participation in the corridor planning development process and the associated resource management programs and policies. A number of important changes have taken place since the completion of the two studies. The total amount of rooms available doubled between the two studies. The number of dining establishments increased from 35 in 1996 to 167 in 2014. The number of tourist attractions (including special events) increased from 65 to 157. There was a greater proportion of respondents from NH in the 2013-2014 Study. There was a larger percentage of visitors from the Northeast in the 1996 study. The results show that participants in the 2014 study were most likely to stay “3-5 hours” (43% to 31%). Participants in the 1996-1997 were more likely to be on their first visit to the site (20% versus 9%). While more participants in the 2013-2014 were more likely to visit “once a year or less” and “2-4 time a year” and participants in the 1996-1997 study were more likely to visit “once a week or so”. This suggests a potential shift in who is visiting the corridor. The results show generally that participants in the 2013-2014 Study are more likely to change the way they use the corridor as a result of congestion reaching the site and crowding at the site.

4. **Applications of Innovations and Experimental Research to Enhance Corridor Management Plans.** Lessons were learned about technology. New technology takes a while to learn and can be a challenge, especially if the technology is not completely rolled out. The use of iPads did attract positive attention. The updates were easy to provide to the CAC. There were no costs associated directly with data entry beyond the interview time. There were challenges associated with merging of the databases, uploading data, and with the low rate participating in the follow-up survey. Facebook was not an effective data collection tool. It was an effective way of communicating CMP progress and outcomes. The NH Seacoast Study Facebook page has 357 followers and is updated as progress is being made on implementing project recommendations.

5. **Implementation of Recommendations.** One greatest challenges to the implementation of recommendations derived from a multi-jurisdictional corridor planning process is having organizational structure that has the capacity to implement the recommendations. One of the most important outcomes from this corridor planning process is the creation of a Byway Council be structured as an advisory committee to the Rockingham Planning Commission rather than establish itself as a separate non-profit entity or quasi-governmental agency. Such a Byway Council, envisioned having a makeup very similar to the Project Advisory Committee, including appointed municipal representatives, state agencies, elected officials and various private sector partners. While staff hours for ongoing assistance from Rockingham Planning Commission will be limited, quarterly Byway Council meetings should be adequate for accomplishing Council business, with working groups formed as needed for specific initiatives. Municipalities and the other public and private agencies participating in the Project Advisory Committee
should be asked to endorse the recommendations of the CMP, and appoint an ongoing representative to the Byway Council to continue implementation work. In other words, the ability to implement the recommendations identified in the Corridor Management Plan requires the creation of an ongoing organization structure for the Byway. The Byway Council that will meet periodically to share information among communities, state agencies and private sector partners, and organize and encourage all of these partners to follow-through with implementation steps identified here. Finally, an ongoing regional Byway Council can serve as an important venue for municipalities to communicate with one another and with state agency and private sector partners about shared regional issues.

**Discussion Questions**

1. Why collaboration is important to the development of a comprehensive corridor development plan?
2. How would you define “stakeholders” and why is it important to actively engage stakeholders in the planning process?
3. What does it mean to “replicate research”? Why is it important in this case study?
4. What is an example of an “innovation” that was utilized in this case study? How was this innovation used?
5. What are some challenges to implementing the recommendations of a comprehensive corridor management plan?
References


Dillman, Don; Virginia Lesser; Robert Mason; John Carlson; Fern Willits; Rob Robertson; and Bryan Burke. 2008. Personalization of Mail Survey for the General Public and Populations with Group Identity: Results from Nine Studies. Rural Sociology: 72(4), 2008, 632-646.


Rob Robertson is an Associate Professor in the Department of Natural Resources and Environment in the College of Life Sciences and Agriculture at the University of New Hampshire. Current research and outreach involvements are focused on the social and economic dimensions of tourism planning and development. More specifically, Dr. Robertson is actively involved in research and outreach activities intended to improve the process (and develop new tools) by which stakeholders participate in natural resource-based tourism decision-making and on reducing non-response bias in survey research. Findings from these projects have been published in seventeen different peer reviewed journals. Published peer reviewed papers embody discipline based science focused on the theoretical or methodological dimensions (e.g., Rural Sociology, Human Organization, Human Ecology, Journal of Environment Planning and Management), as well as those with a focus on a particular resource management issue which tend to be more interdisciplinary in nature (e.g., Marine Policy, Journal of Aquaculture Economics and Management, Journal of Soil and Water Conservation, Society and Natural Resources). He has served or serves on a number of technical advisory committees with a focus on the evaluation and application of social science research methods to natural resource management and tourism planning.