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Cirebon, 13 Oktober 2020
Reviewer,

Aan Jaelani



aanjaelani <iainanjal@gmail.com>

Invitation to Review for SAGE Open (IF 0.715), Manuscript ID SO-20-1492

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1 Juli 2020 20.14

Balas Ke: Ankit.Kapoor@sagepub.in

Kepada: iainanjal@gmail.com, stain_anjal75@yahoo.co.id

01-Jul-2020

Dear Dr. Jaelani:

We have recently received Manuscript ID SO-20-1492 entitled "CONTRIBUTIONS FROM SROI METHODOLOGY TO IMPACTS OF TOURISM" and, based on your area of expertise, would like to invite you to review this manuscript. The abstract appears at the end of this letter.

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We realize you must have a number of personal and professional priorities at the moment, given the global situation around COVID-19. If you are not able to review at this time or you need additional time to complete this review, please let us know. Your safety and that of your family is our priority during these difficult times.

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MANUSCRIPT DETAILS

TITLE: CONTRIBUTIONS FROM SROI METHODOLOGY TO IMPACTS OF TOURISM

ABSTRACT: This article contributes to the debate on the social and economic impacts generated by tourism activities using a methodology that is still insufficiently explored in the field of tourism and the impacts that this causes: social return on investment or SROI. Using the analysis of a case as a guiding thread, this article shows how the application of this methodology allows one to know in depth the social value that an emblematic palace (one of the main tourist attractions of a city in the South of Spain that was designated as a UNESCO World Heritage Site) brings, the changes experienced by the interest groups that interact with it, and the theory of change that promotes the very existence of the palace. Its results and conclusions can also inform policies and strategies of these other actors related to the intervention.



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2 Juli 2020 00.21

01-Jul-2020

Dear Dr. Jaelani:

Thank you for agreeing to review Manuscript ID SO-20-1492 entitled "CONTRIBUTIONS FROM SROI METHODOLOGY TO IMPACTS OF TOURISM" for SAGE Open. The due date for the review is 11-Jul-2020. Please try your best to complete your review in a timely manner, but if you need an extension feel free to contact the editorial office by replying to this message.

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Thank you for submitting your review of Manuscript ID SO-20-1492 for SAGE Open

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Dear Dr. Jaelani:

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Manuscript ID:

SO-20-1492

Manuscript Type

SAGE Open - Research Paper

Methods

Social return on investment (SROI)

Approaches

Mixed

Main Discipline or Subject Area

Business & Management

Keywords

Social return on investment, Impacts of tourism, Social value, Stakeholders, Theory of change, Outcomes, Proxies, Sustainability

Date Assigned:

01-Jul-2020

Date Review Returned:

11-Jul-2020

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req Literature review and use of references

Good

Evaluation Criteria

req Theoretical development of hypotheses

Good

req Quality of design and methods

Good

req Adequate data analyses

Good

Quality of discussion

Adequate

req Legitimacy of conclusions

Adequate

req Clarity and readability

Adequate

req Use of references

Excellent

req Rationale and clarity of definition

Good

req Writing style

Good

req Contributes to new knowledge in the field

Excellent

req Integration of theory (if applicable)

Good

Additional Questions

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Affiliation: Tazkia Institute Indonesia

Would you be willing to recommend a publication decision for this manuscript as an Article Editor?

Yes

No

Recommendation

Accept Pending Minor Revision

Would you be willing to review a revision of this manuscript?

Yes

Confidential Comments to the Editor

This paper is quite adequate and contributory in terms of the study of performance evaluation in the form of social impacts in the tourism sector. The use of theories, methods, and references is quite good which shows the breadth and expertise of the writer in this field. However, source data about the location of the research, the deep academic debate in the discussion, the accuracy of the methods used, and the conclusions generated require a minor revision.

Comments to the Author

The writer is good enough to provide a description of the application of the SROI methodology to measure the impact on tourism activities in one of the castles in the southern Spanish city and make an important contribution in measuring tourism performance by a method different from traditional economic evaluations in general. However, to improve the quality of this article, the writer needs to make minor revisions to the section:

1. Introduction (literature review)

2. Development of Hypothesis Theories

3. Quality of Design and Method

4. Adequate Data Analysis

5. Quality of Discussion

6. Legitimacy of Conclusions

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Author's Response

REVIEW OF THE ARTICLE

Journal : SAGE Open

Manuscript ID: SO-20-1492

Manuscript Type: Research Paper

Title : “Contributions from SROI Methodology to Impacts of Tourism”

*Literature Review and Use References

Social Return on Investment (SROI) as a methodology is widely used in public services, especially in the health and social fields to measure performance in terms of its social impact.

1) The extent to which this SROI is different from other conventional methodologies for measuring positive and negative impacts in the tourism sector. There is a concise explanation.

2). Reinforce that the use of quantitative models from econometric models to structural equation analysis and qualitative models combined with hermeneutics to analyze the impact of tourism has weaknesses or limitations of the study. While SROI is considered to have methodological advantages for the sake of measuring the social performance of tourism activities.

3) Although the literature review is quite adequate from this article, it should be possible to add some recent literature that can be added to the application of the SROI methodology in tourism which is quite relevant to this article, among others:

Jackson, A., & McManus, R. (2019). SROI in the art gallery; valuing social impact. *Cultural Trends*, 28(2-3), 132-145.

Viganó, F., & Lombardo, G. (2018, July). Calculating the Social Impact of Culture. A SROI application in a Museum. In *International and Interdisciplinary Conference on Digital Environments for Education, Arts and Heritage* (pp. 507-516). Springer, Cham.

Nadotti, L., & Vannoni, V. (2019). Cultural and event tourism: an interpretative key for impact assessment. *Eastern Journal of European Studies*, 10(1).

Daye, M., & Gill, K. (2017). Social enterprise evaluation: Implications for tourism development. In *Social Entrepreneurship and Tourism* (pp. 173-192). Springer, Cham.

*Theoretical Development of Hypotheses

1) SROI as the technique chosen to measure the impact and results of tourism activities may have practical and implementation problems in their use. Therefore, there is a confirmation from the author that this SROI is more effective and comprehensive compared to traditional economic evaluation frameworks, such as Cost-Effectiveness Analysis (CEA), Cost-Utility Analysis (CUA) Sub-types of CEA, and Cost-Benefit Analysis (CBA). Can be made a comparison table.

2) Tourism as an industry can provide considerable economic and even psychological benefits for stakeholders and the surrounding community. Is this SROI method able to explain the real impact of tourism activities on the culture or economy of the local community, because tourism activities may have a positive impact on the tourism company or the stakeholders involved, while the surrounding community is negatively affected by this activity because they are for example not involved in it? The author needs to compare the basic SROI theory (basic theory, stakeholder theory, and theory of change) that was developed to build an analysis of the phenomenon.

* Quality of Design and Methods

1) The author needs to focus on the social value of tourism activities by adding a few references to the application of the SROI method in evaluating the value of social results from tourism activities, even though there are 2-3 works of literature that are linked to

museums. The SROI application is used in health policies and programs, sports activities and facilities, and social policies and programs have several weaknesses, while wider tourism activities involve several elements, including local culture, community psychology, and the environment.

- 2) The selected case study of castles in one of the cities in Southern Spain is one of the World Heritage (UNESCO) which is used for tourism, education, research, conservation, and others. The introduction (3.1) needs to be strengthened with data on tourist visits, research, and conservation contributions that have been carried out so far, with sufficient reference, to clarify the phenomenon of the palace site for readers.
- 3) The chosen method is in the form of mixed methods (quantitative and qualitative) with the application of hermeneutics in understanding the context and interaction with stakeholders. The author needs to emphasize who are the people involved or involved in this research (how many people belong to the palace, foundations, banks, and workers, and what their role is in the SROI network), the pattern of relationships between the foundation as manager and the bank, and the pattern management of this site as an entry point in understanding the social impacts of tourism activities.

*** Adequate Data Analysis**

- 1) The author needs to provide data on the mission of "tourism" and what type of "promotion" in terms of the theory of change made by the Palace manager to visitors, employees, the environment, hotel managers, and other interest groups (see section 3.2.1; A), so that the mission and type of promotion are relevant to social and economic contributions when analyzed by the SROI method.
- 2) The author needs to provide data about the efforts and types of conservation that have been carried out by the manager of this "palace" tourism because the conservation of this heritage, culture, and tradition has a core role of the individual and collective identity of the local community. There is also a brief explanation of the role of surrounding communities in the conservation activities of the historical heritage.
- 3) The author updates the latest statistics (2017) and references about tourist visits and their contribution to GDP, especially in this palace destination so that the data analysis is more adequate.
- 4) Analysis of the data needs to be written specifically, which part of the "instrument" that uses data collection techniques through interviews (if any), or surveys, and others. The results of this data collection need to be verified for analysis needs in the discussion.

*** Quality of Discussion**

- 1) The description of the discussion needs to be abbreviated and systematic which focuses on the positive and negative impacts of each subject in this study, for example, the palace, foundations, banks, visitors, local residents, and others.
- 2) Discussion of the results of the SROI methodology at this research location needs to be supplemented with adequate theory with relevant literature to reinforce the results described by the author.

*** Legitimacy of Conclusions**

- 1) The conclusions should be at the end of this paper and strengthened with theory so that the contribution of this paper can be read clearly. Although there are some important results from this research, the writer needs to briefly emphasize who has social impacts (positive and negative) from tourism activities in the palace in one of the cities in Spain and the reasons that surround them, so that there are generalizations that can be made, for

example, causative factors and solutions that can be provided by interested parties as general trends that can be utilized for future research.

- 2) The limitations of the study need to be detailed and written briefly; whether in terms of the SROI methodology and its application, the difficulty of obtaining data, the accuracy of this method for evaluating tourism impacts and output, the difficulty of measuring the impact on the subjects studied, or others.

*** Clarity and Readability**

- 1) To add to some sections references (introduction and discussion), statistics on tourist visits, and economic impacts.
- 2) The method part is written more systematically, especially on data collection techniques and data analysis techniques, especially the explanation of hermeneutics that is not found in detail.
- 3) Some explanations in the discussion section should be shortened by adding references to make it easier for readers to understand them.
- 4) Conclusions should be written briefly reinforced by the theory (if needed).

*** Use of References**

- 1) Add some recent articles about the SROI methodology in the field of tourism.

*** Rationale and Clarity of Definition**

- 1) The definition, background, and theoretical basis of the SROI methodology are sufficient. Just add a brief explanation of the hermeneutics used in these mixed methods.
- 2) Source data originating from the subjects studied were inadequate, including the latest statistics on tourist visits and GDP, the type of conservation undertaken by the palace, and the pattern of relationships involved in managing palace destinations.
- 3) The type of impact produced in this research is made briefly and systematically with adequate analysis (for example, who is affected, the causes, solutions made, what changes occur).

*** Writing Style**

- 1) The author needs to reorder certain parts that are widely explained (discussion, conclusions, and limitations of the study) and require systematic description (methods). Academic debates need to be developed by adding adequate references.
- 2) Proof-read and edit the text to reduce some syntax and grammatical errors.

*** Contribute to New Knowledge in the Field**

- 1) The author has presented good research results on the methodology of SROI for analysis of impact in the field of tourism.

*** Integration of Theory (if applicable)**

- 1) The author has provided an adequate explanation in terms of theory and discussion that shows the integration of performance evaluation or impact on management, business, economics, and tourism.
- 2) The results of this research using the SROI methodology can be developed by other writers for wider tourism development, or other fields.

***Additional Questions**

-

*** Confidential Comments to the Editor**

This paper is quite adequate and contributory in terms of the study of performance evaluation in the form of social impacts in the tourism sector. The use of theories, methods, and references is quite good which shows the breadth and expertise of the writer in this field. However, source data about the location of the research, the deep academic debate in the discussion, the accuracy of the methods used, and the conclusions generated require a minor revision.

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2. Development of Hypothesis Theories
3. Quality of Design and Method
4. Adequate Data Analysis
5. Quality of Discussion
6. Legitimacy of Conclusions

Indonesia, July 11 2020
Reviewer,

Dr. Aan Jaelani

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CONTRIBUTIONS FROM SROI METHODOLOGY TO IMPACTS OF TOURISM

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| Journal: | <i>SAGE Open</i> |
| Manuscript ID | SO-20-1492 |
| Manuscript Type: | SAGE Open - Research Paper |
| Keywords: | Social return on investment, Impacts of tourism, Social value, Stakeholders, Theory of change, Outcomes, Proxies, Sustainability |
| Main Discipline or Subject Area: | Business & Management |
| Approaches: | Mixed |
| Methods: | Social return on investment (SROI) |
| Abstract: | <p>This article contributes to the debate on the social and economic impacts generated by tourism activities using a methodology that is still insufficiently explored in the field of tourism and the impacts that this causes: social return on investment or SROI. Using the analysis of a case as a guiding thread, this article shows how the application of this methodology allows one to know in depth the social value that an emblematic palace (one of the main tourist attractions of a city in the South of Spain that was designated as a UNESCO World Heritage Site) brings, the changes experienced by the interest groups that interact with it, and the theory of change that promotes the very existence of the palace. Its results and conclusions can also inform policies and strategies of these other actors related to the intervention.</p> |
| | |

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CONTRIBUTIONS FROM SROI METHODOLOGY TO IMPACTS OF TOURISM

1. Introduction

The study of positive and negative effects of tourism on local populations and destination areas is not a new field of study in tourism literature (antecedents can be traced to Ap, 1992 or Mathieson and Wall, 1982). However, in the past few decades, the tourism boom experienced in some cities and regions of the world has renewed the attention on the topic and has mainly focused on the attitudes and perceptions of residents towards the impacts of tourism. Today, this field of study gathers an eclectic range of authors who apply a wide variety of methodologies and approaches to determine both the positive and negative impacts of tourist activities.

Regarding the methodologies, in the arena of quantitative models, studies on the impacts of tourism are currently transiting from the most conventional econometric models (Nisthar and Vijayakumar, 2016; Seetanaah, 2011; Narayan, 2004) to structural equation analysis, which started with pioneering studies (Ko and Stewart, 2002; Reisinger and Turner, 1999) and today can be probably considered as the go-to quantitative methodology (Ali et al., 2018; Carneiro et al., 2017; Khoshkam et al., 2016).

Despite the valuable insights provided by quantitative methodologies, most innovative voices are seeking the incorporation of qualitative and hermeneutic models into the analysis of the impacts of tourism. Therefore, methodologies based on quality of life analysis (Uysal et al., 2016; Kim et al., 2013, 2015; Andereck and Nyaupane, 2011; Andereck and Jurowski, 2006), resident perceptions (Chen et al., 2018; Ouyang et al., 2017; Xu et al., 2016; Almeida-García et al., 2016; Wu and Chen, 2015; Styliadis et al., 2014; Andereck et al., 2005; Perdue et al., 1990), and stakeholder analysis (Lundberg, 2017; Nunkoo and So, 2016; Banki and Ismail, 2014) are gaining momentum and gathering the largest body of recent literature.

In this paper we present the contribution to the field of tourism and its impacts of a yet insufficiently explored methodology : social return on investment or SROI. The SROI is a mixed methods analysis that relies on the hermeneutic knowledge of the context and the interaction with stakeholders while also offering the quantification of the impacts they receive. Furthermore, even if SROI provides information that is directly focused on the social value generated by the project, program, policy or institution analyzed, then it also offers indirect insights on their economic and environmental impacts.

The thesis of this research is that the point of view provided by SROI complements other traditional methods by offering a new asset that can not only enrich the approaches of other studies in the field but also may open new lines of research.

To share the findings of the application of SROI to a tourist activity, the rest of the paper is organized as follows: Section 2 introduces the debate on the impacts of tourism activities and discusses the adequacy of the SROI methodology to assess this field of knowledge. In Section 3, the case study is presented: an emblematic palace, one of the main tourist attractions of a city in the South of Spain that was designated as a UNESCO World Heritage Site (at the express request of the private foundation that owns and manages the palace, the name of which will remain anonymous). Section 4 discusses the results obtained and the implications derived from the application of SROI methodology to tourism impact literature. Finally, in Section 5, we present the main limitations of the paper and the future lines of research within the field of study.

2. The debate on impacts of tourism and potential contributions from the SROI methodology

2.1. The state of the art in tourism impact literature.

In later years, due to the expansion of tourism activities across the world, the literature on its impacts is witnessing a renewed attention. Traditionally, this body of literature has been addressed from three different perspectives: economic, sociocultural, and environmental. Only in the last decade, more than one-hundred evidence-based studies have recognized both favorable and unfavorable impacts within each of these spheres. Consequently, different systematic reviews have struggled to gather and systematize the conclusions of this increasing body of research (Kim et al., 2013 emerges as one of the most omni-comprehensive ones). Despite all gathered evidence, only a handful of issues have reached enough academic agreement, and most of the traditional debates still persist.

Although tourism is widely perceived as an industry with several economic benefits (Andereck et al., 2005), one of the most controversial topics is the unequal distribution of benefits and costs across different stakeholders linked to tourist activities or destinations (for example, the research of Chen et al. (2019) shows a meta-analysis of the direct economic impacts of cruise tourism on port communities). Naidoo et al (2016) have probed how certain activities only benefit salaried jobs linked to them, while costs distribute among every other stakeholder. Yolal et al. (2016) also determine how cultural activities deeply impact subjective well-being of residents as they increase psychological tension among community members.

Another hot topic deals with saturation of some areas within touristic cities or regions (Alvarez-Sousa, 2018). This is no new topic, as some countries have been taxing overnight hotel stays and Natural Parks establishing visitor limits from decades. However, the explosion of tourism and the centrality of sustainability have re-emerged the debate on carrying capacity (Sood and Chogle, 2016; Coccosis and Mexa, 2017). Whether tourist activities themselves can contribute to spread the benefits and to readjust the saturation processes is still on debate, and academic voices claim from a tourism taxation based on nonresident consumption in tourism services (García-Lopez et al., 2018) to the strengthening of synergies between the different agents involved in the tourism sector as a self-managed solution (Pérez-Guilarte and Lois-González, 2018). The importance of this debate is crucial in cases where tourist activity concentrates in some periods of the year (Connell et al., 2015).

The last debate refers to the management of tourist activities. Some authors (Nunkoo, 2015; Ciolac et al., 2017) are analyzing how the management of such activities by local government have a mediate effect on the distribution of costs and benefits, but the own authors admit it to be an under-researched area.

No single methodology can address such complex issues, and often the results obtained are not comparable as theoretical foundations and underpinnings differ (Bateman and Fleming, 2017). However, the contributions of yet insufficiently explored methodologies like SROI can contribute to enlighten these debates. With this scope we introduce the methodology.

2.2. Origins, current state and theoretical foundation of the SROI methodology.

There is a common agreement among SROI academics to track the origins of the methodology back to the year 1997 in the United States of America (from Emerson et al., 2000 to Banke-Thomas et al., 2015). At that time, the Roberts Enterprise Development Fund (REDF) incorporated six levels or results of social nature into the calculation of blended value analysis. This index materialized in a ratio that related the costs of the investments with the value of the benefits generated as a modification of the characteristic cost-benefit analysis (CBA).

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3 In 2003, in England, the New Economic Foundation redefined the methodology developed by the
4 REDF by giving greater prominence to stakeholder participation in the development of the whole
5 process of social value assessment. This incorporation of hermeneutic knowledge into the
6 process is how the social return on investment (SROI) methodology was born. However, the
7 maturity of the methodology was only reached a few years later when Nicholls et al. (2009, 2012)
8 established its basic principles and the different phases for its implementation.
9

10 SROI analysis seeks to demonstrate, by means of evidence, the sustainability and the social
11 value added by interventions and organizations through the understanding, managing and
12 communication of their impacts in economic, social and environmental terms (Rotheroe and
13 Richards, 2007; Maier et al., 2015; Millar and Hall, 2013).
14

15 To do so, SROI evaluates the value of the social results created by an intervention or organization
16 by putting them in relation to the costs required to achieve such results. From this point of view,
17 the SROI method is based on a conventional CBA (Walk et al., 2015), although it goes a step
18 further by assigning monetary values to other impacts of a social and an environmental nature,
19 both tangible and intangible.
20

21 To do so, the theoretical foundation of SROI relies in three theories: the grounded theory, the
22 theory of stakeholders and the theory of change. Grounded theory provides the epistemological
23 approach to research methodology, which demands operating inductively in contrast to
24 hypothetic-deductive approaches (Glaser and Strauss, 1967). As the scope is to evaluate the
25 impacts of tourist activities, the grounded theory relies in the theory of stakeholders, which calls
26 for take into consideration only the changes that are explicitly identified and valued by the involved
27 stakeholder (Freeman, 1984). Finally, to track the understanding of the chain of changes
28 produced to such stakeholders, and to justify the attribution of such impacts to the activity being
29 evaluated, SROI relies on the elicitation of the theory of change (Weiss, 1995).
30

31 As most social interventions have a genuine intention to improve the living conditions of the
32 population, the coexistence of the grounded theory, the theory of stakeholders and the theory of
33 change support the attribution of impacts, or how the inputs or activities implemented can produce
34 a series of outputs or results that in turn are able to achieve the final outcomes or impacts pursued,
35 thereby understanding impacts as those significant changes that people experience, identify and
36 declare as a result of the activities carried out by an organization (Nicholls et al., 2009).
37

38 **2.3. Applications of SROI for tourism impact analysis**

39 As we have seen in the previous section, the first studies applying SROI principles started less
40 than 20 years ago. However, in this brief period, the methodology has been widely applied to an
41 extensive range of fields of study.
42

43 Main studies have pursued the quantification of social value added by health policies (Dyakova
44 et al., 2017; Knepil et al., 2017; Banke-Thomas et al., 2015) and programs (Courtney and Baker,
45 2017; Walker et al., 2017; Kumar and Banke-Thomas, 2016), sport activities and facilities (Davies
46 et al., 2016; King, 2014), and mainly social programs and policies, including those from
47 employment interventions (Owen et al., 2015) to social capital initiatives (Vieta et al., 2015;
48 Arvidson et al., 2014). Today, the Social Value Initiative has identified more than 800 studies
49 using the SROI methodology in an equally wide range of contexts and levels.
50

51 In the field of tourism, and specifically regarding tourism impacts, as any other emerging science,
52 SROI started its applications with case studies. One of the most acknowledged in the field is the
53 impact evaluation of the Auckland Museum's: Moana - My Ocean Exhibition (Allpress et al., 2014).
54 In the past few years, SROI studies applied to tourism impacts have been gradually incorporating
55 new dimensions, from the impact of specific attractions (Aventia, 2017) and museums (PWC,
56 2014; Barnett, 2011) to the social value generated by museums as a whole (Whelan, 2015), even
57 exploring the impacts generated by tourism at country level (PWC, 2015).
58

59 SROI-based studies demonstrate the contributions that the methodology can offer to the
60 comprehension of the phenomenon, which we summarize as follows:

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3 First, SROI calculations and justifications are strongly grounded in the theory of change. This
4 theory means that as more evidence-based studies provide their maps of changes, we can
5 identify and follow the path that explains how tourism activities finally impact and change the lives
6 of the actors affected by them. The elicitation of these theories of change can help decision
7 makers and general managers to adopt better informed strategies and policies.
8

9 Second, in the analysis, SROI incorporates the vision of every stakeholder involved or affected
10 by the intervention. Some of the stakeholders identified in the aforementioned case studies
11 include visitors, staff, merchants, the local populations or public administrations. The polyhydric
12 impacts of tourism activities and attractions are therefore presented collectively, but the
13 disaggregation offered actor by actor can inform specifically addressed decisions to minimize or
14 maximize the impacts some of them that are identified.
15

16 Third, the potential escalation of the SROI analysis allows the possibility to focus on specific
17 cross-cutting issues, such as specific impacts of tourism (i.e., the concentration of tourism and
18 the effects derived from the saturation) or innovative interventions within a larger organization or
19 activity. This in-depth knowledge could lead to a better decision-making process based on the
20 generation of social value that can be applied to any entity or intervention.
21

22 To illustrate such contributions of the SROI method, in this paper, we present a case study: a
23 representative palace located in a city in the South of Spain.
24

25 **3. Case study: an emblematic palace in Spain**

26 **3.1. Introduction**

27
28
29 The historical palace that is the object of this analysis is a monument with more than five hundred
30 years of history and was declared a national artistic historical monument in the 1980s. It is located
31 in a Spanish city that has an imposing architectural legacy, being that it is one of the few cities in
32 the world that has four World Heritage appointments by UNESCO. However, despite the
33 remarkable heritage offered by the city, a single monument monopolizes much of the tourism,
34 something that is understandable as it is the third most visited monument in Spain after the
35 Alhambra in Granada and the Sagrada Familia in Barcelona.
36

37 Thus, one of the main impacts of tourism in the city is the extremely high concentration of visitors
38 in the historic center. Today, the three most visited monuments of the city are distanced no more
39 than 500 meters one from each other. This concentration of tourists in the center of the city is
40 starting to show signs of exhaustion as the benefits and costs are unequally distributed. While
41 saturation affects the daily lives of some of its inhabitants, an important part of the city merchants,
42 restaurateurs and business owners rely on tourism. Thus, the monuments located far away from
43 the center contribute the most by both attracting tourists to the city and also dispersing them along
44 it. The palace is one of these monuments.
45

46 Today, the palace belongs to a private foundation owned by a bank. The foundation is the
47 instrument through which the bank channels the social work carried out in its closest environment.
48 For this, among other actions, the foundation uses the palace as the nerve center of its cultural
49 activity, projecting its actions towards the exterior and linking itself more closely with the city,
50 thereby promoting and contributing to its social and economic development.
51

52 Regarding the purpose of the palace, it contributes to safeguarding the local memory through
53 research, conservation, teaching, exhibition and administration of the collections it houses. This
54 private collection demonstrates the historical evolution of the city since the fifteenth century and
55 is representative of the inheritance of tangible and intangible assets of its cultural heritage.
56

57 The other great attraction of the palace is its beautiful “patios” (courtyards) connected to each
58 other by a series of galleries where a great diversity of plants abounds. Each of the twelve “patios”
59 plus the garden has a unique personality, thus offering visitors the chance to enjoy remarkable
60 sensations depending on the time of the year in which the visit is made.

3.2. Application of SROI: a mixed-methods approach to assess the social value generated by the Palace

The application of SROI is based on a mixed methodology: half qualitative and half quantitative. It relies on the hermeneutic knowledge of the context and interactions with stakeholders while also offering the economic quantification of the impacts they declare to receive.

The SROI methodology is based on a series of inspiring principles proposed by the SROI network: (1) involve stakeholders, (2) understand what changes, (3) value the things that matter, (4) only include what is material, (5) do not overclaim, (6) be transparent, and (7) verify the results. These principles are usually applied in a six-stage methodology that is carried out from the qualitative steps to the quantitative ones as follows: (1) establishing the scope and identifying key stakeholders, (2) mapping outcomes, (3) evidencing outcomes and giving them a value, (4) establishing the impacts, (5) calculating the SROI, and (6) reporting, using, and embedding (Nicholls et al., 2012).

3.2.1. The qualitative share

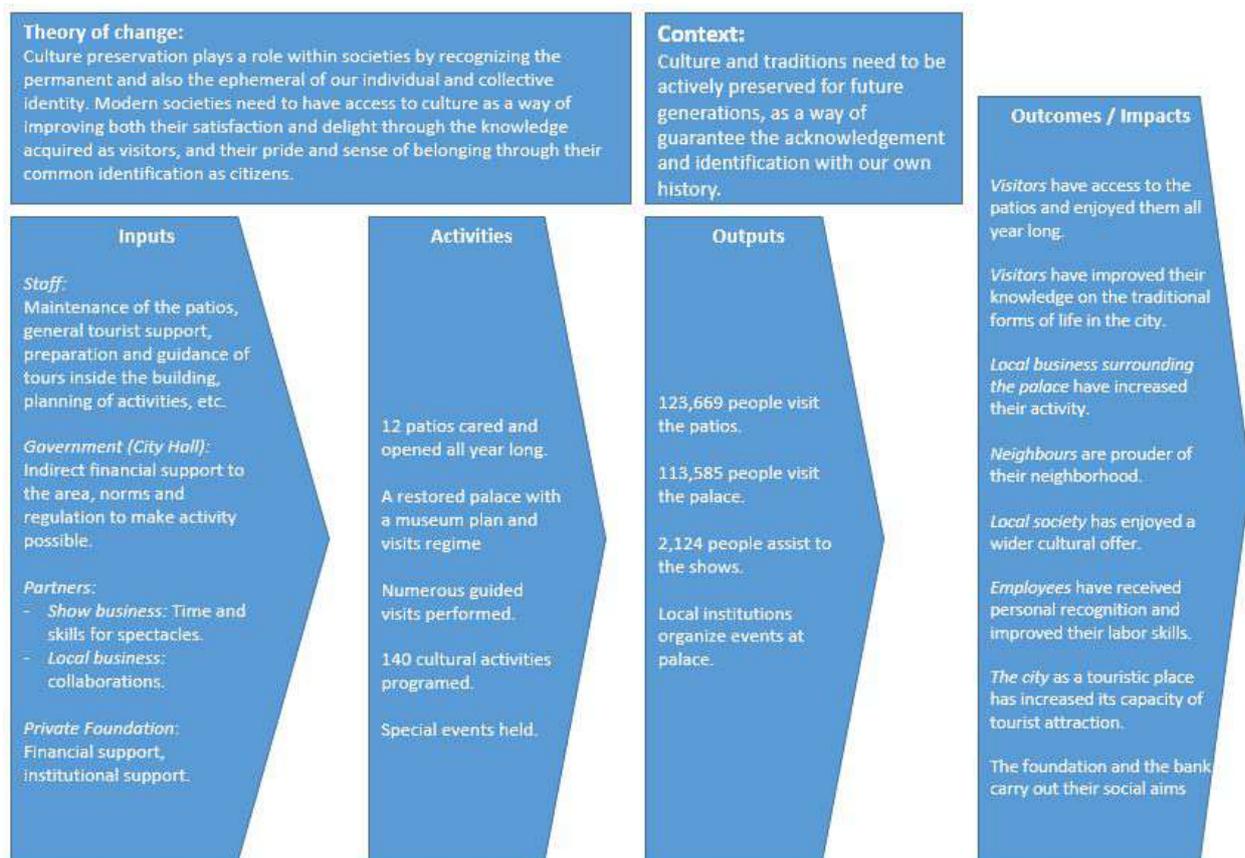
A. The Theory of Change of the Palace

One of the key elements for the SROI methodology to produce reliable and verifiable results is the identification of the theory of change that underlies it. Only by this will it be possible to understand and internalize the relationships between the different inputs, outputs and outcomes (Nicholls et al., 2012). In our case, it is about knowing how the palace promotes certain changes in the lives of visitors, employees, the neighborhood or nearby hospitality businesses, among other interest groups, thus contributing to the fulfilment of its mission from social and economic points of view.

The theory of change clarifies and helps to understand the relationship that takes place between the inputs or resources mobilized by the organization, the activities deployed thanks to these, the outputs or products obtained from their execution and, finally, the outcomes or impacts derived from these results (Nicholls et al., 2009). From this perspective, the SROI methodology allows us to learn about what has been done to promote such changes and what would happen if the palace did not exist.

Figure 1 shows the logical model and the elements of the theory of change on which this study is based.

Figure 1. Theory of Change of the Palace



Regarding the underlying theory of change in the palace, it should be noted that the conservation of heritage, culture and popular traditions constitutes a core role of its identity, both individually and collectively, thus contributing to the delight of visitors and increasing the sense of pride and belonging of local citizens.

The palace generates significant impacts in the field of tourism in the Spanish context where 14.9% of GDP in 2017 came from the more than 82 million international tourists (almost twice the Spanish population), which made it the second most visited country in the world behind France and ahead of the United States.

To achieve these impacts, it is necessary to rely on a series of inputs from different actors: employees, neighbors, the public administration and, of course, the private foundation (and the Bank that owns it) that finances the palace while simultaneously acting as a facilitator of its cultural activity. As Figure 1 shows, these resources allow a series of activities that through the results that are obtained will lead to a multitude of impacts. The identification of the impact chain that facilitates the enunciation of the theory of change allows it to monetize the global impact derived from the intervention, for which the SROI analysis methodology will be applied as described in the following sections.

B. Coestablishing scope and identifying stakeholders

To demonstrate the monetary value of the outcomes that the palace brings to society, in the present work, we carry out an SROI analysis of the entity for the year 2016. This year constitutes a milestone in the history of the palace since, after a substantial architectural remodeling of both the palace and its surroundings, it exceeded 100,000 visitors for the first time in its history.

From this moment, the palace was transformed into a cultural container where on the one hand, local memory is safeguarded, through the research, conservation, teaching, dissemination, exhibition and administration of its property and its valuable collections (paintings, books,

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3 weapons, furniture, tapestries...) and, on the other hand, it starts a full-year cultural program that
4 connects the palace with the current cultural life of the city.

5
6 Once the objective of the analysis is established, the next step is the identification and
7 involvement of the palace's groups of interests. This step is an essential feature of SROI that
8 differentiates it from other methodologies that place the focus on cost-benefit analysis. The
9 participation of stakeholders in all phases of the process favors communication and learning by
10 using a language easily understood by all parties involved. In addition, it clarifies the mission and
11 strategy of the organization (Mook et al., 2015).

12
13 In an initial phase, for the identification of the stakeholders, different interviews were carried out
14 with personnel of the owning foundation and with the management of the palace. More
15 specifically, we adopt the proposal of Mitchell et al. (1997), which identifies all affected
16 stakeholders following a brainstorming methodology and assigns each of them a score (high,
17 medium or low) in three dimensions: (1) influence (presence of the stakeholder in the organization
18 in such a way that it will be greater the more that the stakeholder should be considered in the
19 setting of the policies of the company), (2) power (stakeholder capacity to intervene with authority
20 in the organization's decision making, which is also the ability of a specific group of interest to
21 impose its will) and (3) interest (degree of commitment that the stakeholder has with the
22 organization, or vice versa, in such a way that the higher the dependency of the organization will
23 make it higher). With this methodology, it was possible to identify and prioritize the stakeholders
24 related to the palace, as shown in Table 1.

25
26 **Table 1. Identification of stakeholders**

| Stakeholders | Dimensions | | | | |
|-----------------------|--------------------------------------|-------|----------|-------|----------|
| | Scale: 1 (low); 2 (medium); 3 (high) | | | | |
| | Influence | Power | Interest | Total | Priority |
| Private foundation | 3 | 3 | 3 | 9 | 1 |
| Bank | 3 | 3 | 2 | 8 | 2 |
| Visitors | 3 | 1 | 3 | 7 | 3 |
| Employees | 1,5 | 1,5 | 3 | 6 | 4 |
| Neighborhood | 2 | 1 | 1,5 | 4,5 | 5 |
| Hospitality business | 1 | 1 | 2,5 | 4,5 | 5 |
| Local citizens | 1 | 1 | 2,5 | 4,5 | 5 |
| Public administration | 2 | 1 | 1 | 4 | 8 |
| Subcontractors | 1 | 1 | 2 | 4 | 8 |
| Show viewers | 1,5 | 1 | 1 | 3,5 | -- |
| Researchers | 1 | 1 | 2 | 4 | -- |
| Show organizers | 1 | 1 | 2 | 4 | -- |
| Tourism office | 1 | 1 | 1 | 3 | -- |
| Patios network | 2 | 1 | 1 | 4 | -- |
| City council | 1 | 1 | 1 | 3 | -- |

Once a first approximation was made for the priority stakeholders, we carried out a brainstorming session with two purposes: review and confirm the established prioritization and determine the possible causes that advise modifying the relative position occupied by a specific stakeholder in the study.

After this process of reflection, some groups were excluded from the analysis (listed in Table 1 in italics) for different reasons that were explained in detail. For example, researchers who come to study the palace's documentary collections were excluded due to lack of materiality since they are not considered to experience significant impacts since their relationship with the palace is sporadic, which reduces the number of researchers.

C. The impacts caused by the Palace

For the identification of the impacts that every stakeholder receives, it is necessary to ask the following question: what changes, of a positive or negative nature, are due to the linkage of the stakeholder to the organization? Ultimately, it is a question of collecting in a motivated way the reasons why each of the groups of interest is related to the activity of the organization, which would ultimately justify the analysis of the changes they receive from it. In the case of the palace, the most relevant motivations are concentrated around its two main activities: the leisure of cultural activities and the preservation of local traditions.

Once this part is complete, the SROI methodology recommends the use of the focus group technique, which is established by the authors and the direction of the palace with each stakeholder. In these focus groups, we proceed to identify the changes that could be expected to occur in each of the affected stakeholders by subjectively assessing each of them based on a criterion of relevance (A-B-C, with A being the most relevant). The less relevant changes, noted by C, will be removed from further analysis.

Table 2 summarizes the complete proposal of the analysis of change for each of the stakeholders involved.

Table 2. First approach to the analysis of change

| Stakeholder | Motivation | Potential impacts | Subjective valuation of change |
|-----------------------|--|--|--------------------------------|
| Private Foundation | Implementation of its goals, collaboration in socioeconomic development through cultural tourism | - Revaluation and maintenance of the patrimony - Complements the offer of own activities | (*) (*) |
| Bank | Presence in the community, visibility, contribution to the brand | - Improved image (loyalty and knowledge of the entity) - Added value to customers / employees - Integration and openness to society - Improvement in the work climate | A B A C |
| Visitors | Delight, knowledge of the local culture, access to the culture of the courtyards | - Enjoy the courtyards all year - Improvement of the knowledge of the yards - Improved knowledge of traditional ways of life - Improvement of physical health (greater mobility) | A A A B |
| Employees | Professional development and availability of a job | - Identity or sense of belonging - Permanence of the workplace - Adaptation to the job (rhythm, shifts, remuneration policy...) (-) | A C B |
| Neighborhood | Collaboration in the development of the neighborhood | - Sense of belonging to the neighborhood - Revaluation of real estate - Infrastructure improvements (light, steel...) - Improvement in security - Increase in noise (events or tourists) (-) | B C C B B |
| Hospitality business | Cultural development | - Identification with the cultural heritage of the city - Complement the cultural programming of the city - Positive effects due to the reorganization of the tourist offering - Negative effects due to saturation of the city caused by tourism (-) - Availability of a space for the organization of events - Attraction of tourists | A A B C B |
| Local citizens | Business improvement | - Greater business - Employment creation | A C |
| Public Administration | Economic development | - Increase in income from social contributions - Increase in income from taxes (IRPF) - Indirect savings in unemployment benefits | B B B |
| Subcontractors | Business development | - Greater business - Employment creation - Greater prestige for collaboration | A C B |

(*) Since the private foundation is the owner of the palace and its role is to fulfil its mission, the SROI advises considering the SROI calculation as a proxy for the value of the change it receives.

3.2.2. The quantitative aspects: evidencing and assessing inputs, outputs and outcomes

A. Quantification of the impacts

For the quantification of the different changes, we agreed upon a series of indicators that represent the impacts in the most objective way possible. The measurement of these was conducted with secondary information or with surveys that were designed ad hoc for that purpose (the surveys and their results are available upon request for those researchers who wish to consult them).

An example of an item in relation to the change experienced by visitors is "Have you learned anything new about the culture and / or traditional ways of life in the city?" Another item related to the opinions that citizens have about the contribution of the palace to the culture offer of the city is "If the palace did not exist, then how do you think the cultural program of the city would be affected?"

Based on the information obtained, we determined the amount of change experienced by each stakeholder, which is called the change *incidence*. The impact indicators used in this research, the results obtained about the incidence of the changes, and the *proxies* chosen for the assessment of said impacts and their sources are presented in Table 3.

Table 3. Parameters for the quantification of impact

| | Impacts | Indicators | Incidence | Proxy | Source | € |
|-----------|---|--|-------------------------------------|--|---|-----------|
| Bank | Image improvement (loyalty and knowledge of the entity) | No. of appearances in media | Press (689) and radio (162 minutes) | Costs of appearances in local press and radio | Information provided by the bank | 672,122 |
| | | No. of events organized by the Bank | 140 | Rental of an equivalent place | Information provided by the bank | 1,000 |
| | Value added to employees | No. of employees who recognize or value the Palace as an element of motivation | - | Not quantifiable | Data not available | - |
| | Integration and openness to society | No. of clients that remain or that are captured | - | Not quantifiable | Data not available | - |
| Visitors | Enjoy the courtyards all year | Degree of satisfaction with the visit (scale 0-4) | 3,785 | Average price of entry to the first 5 monuments of the city | Quantification according to the survey | 7 |
| | Improvement of the knowledge of the courtyards | Contribution to the improvement of knowledge (scale 0-4) | 3.38 | Average price of an audio guide | Quantification according to the survey | 3.5 |
| | Improving knowledge of traditional ways of life | Contribution to the improvement of knowledge (scale 0-4) | 3.2 | Average price of an audio guide | Quantification according to the survey | 3.5 |
| | Improvement of physical health (due to mobility) | Approximate time of visit and displacement (hours) | 187,382.98 | Half hour costs of a gym visit corrected by type of activity | Quantification according to the survey | 0.63 |
| Employees | Identity / sense of belonging | Level of satisfaction (scale 0-4) | 3.66 | Average of the desirable annual salary difference to change jobs | Quantification according to the survey | 3.523 |
| | Adaptation to the job (-) | Level of perception of the inconveniences caused by the job (scale 0-4) | 1.92 | Annual average of the bonuses recognized in the agreement | Quantification according to the survey | 980.83 |
| | Employment creation | No. of jobs | fifteen | Average annual salary | Information provided by the palace management | 32,352.07 |

| | | | | | | |
|-----------------------|--|--|------------|--|--|------------|
| Neighborhood | Sense of belonging to the neighborhood | Contribution of the palace to the identification with the neighborhood (scale 0-4) | 0.61 | Annual fee for neighborhood association | Quantification according to the survey | 10 |
| | Improvement in security | Perception of the change in security (difference between the neighborhood and the city) | -1.48% | Annual insurance costs of a home | Quantification according to the survey | 133,39 |
| | Increase in noise (-) (events) | Discomfort level due to noise (scale 0-3) | 0.17 | Rates per tourist | Quantification according to the survey | 1.28 |
| | Increase in noise (-) (no tourists) | Level of discomfort due to tourist traffic (scale 0-3) | 0.12 | Rates per tourist | Quantification according to the survey | 1.28 |
| Local Citizens | Identity with the cultural heritage of the city | Level of contribution to satisfaction with the city (scale 0-4) | 0.13 | € difference between alternative visit to world heritage city and nonheritage city | Quantification according to the survey | 4.99 |
| | Complement to the cultural programming of the city | Level of contribution to cultural programming (scale 0-4) | 0.59 | Average price of tickets to cultural spaces with a similar offer in the city | Quantification according to the survey | 8.37 |
| | Positive effects due to the reorganization of the tourist offering | Level of perception of the contribution of the palace to the decongestion of tourism (%) | 18.48% | Average daily tourist rate | Quantification according to the survey | 1.28 |
| | Negative effects of saturation of the city caused by tourism | Level of contribution to saturation (%) | 2.15% | Average daily tourist rate | Quantification according to the survey | 1.28 |
| | Attraction of tourists | Number of tourists who would not visit the city if there was no palace | 37,490 | Average daily tourist spending in the city | Quantification according to the survey | 59.01 |
| Hospitality business | Greater business | Percentage of clients coming from the palace | 15.79% | Average expenditures per client | Quantification according to the survey | 9.38 |
| Public Administration | Increase in income from social contributions | Number of employees that contribute to social security | 1.68 | Annual average social security contributions | Close palace accounts 2016 and social security website | 11,646.75 |
| | Increase in income from taxes (IRPF) | No. of employees that pay income taxes | 1.68 | Annual valuation according to the average rate of IRPF | Close accounts palace 2016 and website tax agency | 5,415.74 |
| | Indirect savings in unemployment benefits | Number of people who do not earn unemployment benefits | 1.68 | Average annual value of unemployment benefits | Close accounts palace 2016 and website Public State Employment Service | 11,480 |
| Subcontractors | Greater business | Amount of business attributable to the palace (€) | 102,749.67 | Annual business euros | Information provided by subcontracting companies | 102,749.67 |
| | Greater prestige of collaboration | Indirect effect of collaboration in the business (€) | 135,385.11 | Euros difference in the annual turnover and turnover of the palace | Information provided by subcontracting companies | 135,385.11 |

Regarding the proxies, it should be noted that when dealing with the impacts of an intangible nature, with a component of subjectivity, the proxies chosen for the evaluation of the impacts can only constitute an estimate as close as possible to the social value since there is no direct measurement of it (Rauscher et al., 2012). Even when recognizing this limitation, the

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3 quantification of the value that the palace contributes to society makes it more visible to some
4 information claimants, such as funders (Arvidson et al., 2014; Cooney and Lynch-Cerullo, 2014),
5 by using an economic language that allows for a better understanding of the aforementioned
6 social value (Rauscher et al., 2012).
7

8 As an example, in Table 3, we can observe that to monetarize the impact of the sense of belonging
9 that employees have with the palace, the proxy that was used was “the average of the annual
10 salary difference they would be willing to accept to change jobs”. This was an amount that
11 amounted to € 3,523 a year, according to the data collected through the surveys that were carried
12 out.
13

14 **B. The distilling of impacts**

15
16 Following one of the core principles of the SROI methodology, a process of reflection began on
17 changes that should not be attributed to the ordinary activity of the palace, either because they
18 have actually been generated by others (reflected in the *attribution* coefficient), or because these
19 changes would have occurred anyway, even if the palace did not exist (reflected in the *deadweight*
20 coefficient).
21

22 The values of these coefficients of adjustment were obtained mostly through interviews and
23 questionnaires. The summary of how the debugging coefficients affect each of the analyzed
24 changes is presented in Table 4.
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Table 4. Summary of the final valuation of changes

| | IMPACTS | Quantification of the impact | Proxies | Gross impact | Attribution | Deadweight | Net impact (SROI) | TOTAL |
|-----------------------|--|------------------------------|------------|-----------------|-------------|-----------------------------|-----------------------|---------------------|
| BANK | Image improvement (loyalty and knowledge of the entity) | 1 | 672,122 | 672,122 € | 0% | 0% | 672,122.00 € | |
| | | | | | | | BANK | 672,122.00 € |
| VISITORS | Enjoy the courtyards all year | 117,034.39 | 3.785 | 819,240.78 € | 0% | 0% | 819,240.78 € | |
| | Improvement of the knowledge of the courtyards | 102,816.33 | 3.38 | 359,857.15 € | 0% | 64% | 129,818.60 € | |
| | Improving knowledge of traditional ways of life | 91,063.36 | 3.2 | 318,721.75 € | 0% | 0% | 318,721.75 € | |
| | Improvement of physical health (due to mobility) | 187,382.98 | 0.63 | 118,051.28 € | 20% | 64% | 34,453.48 € | |
| | | | | | | VISITORS | 1,302,234.61 € | |
| EMPLOYEES | Identity, sense of belonging | 13.15 | 3,523 | 46,338.51 € | 0% | 23.2% | 35,581.36 € | |
| | Adaptation to the job (-) | -7.21 | 980.83 | -7,073.29 € | 0% | 58.3% | -2,947.21 € | |
| | Employment creation | 15 | 32,352.07 | 485,281.08 € | 0% | 88.8% | 54,428.12 € | |
| | | | | | | EMPLOYEES | 87,062.27 € | |
| HOSPITALITY | Greater business | 4,405.78 | 9.36 | 41,238.97 € | 0% | 0% | 41,238.97 € | |
| | | | | | | HOSPITALITY BUSINESS | 41,238.97 € | |
| NEIGHBOURHOOD | Sense of belonging to the neighborhood | 354 | 133.39 | 47,220.06 € | 86.2% | 101.5% | -96.85 € | |
| | Improvement in security | -166.60 | 1.28 | -213.25 € | 0% | 0% | -213.25 € | |
| | Increase in noise (-) (events) | -4,946.76 | 1.28 | -6,331.85 € | 0% | 0% | -6,331.85 € | |
| | Increase in noise (-) (no tourists) | 1,991.25 | 10 | 19,912.50 € | 76.9% | 0% | 4,595.19 € | |
| | | | | | | NEIGHBOURHOOD | -2,046.76 € | |
| CITIZENS | Identity with the cultural heritage of the city | 266,385.06 | 4.99 | 1,329,261.45 € | 96.7% | 85.8% | 6,237.01 € | |
| | Complement to the cultural programming of the city | 10,797.89 | 8.37 | 90,378.32 € | 77.7% | 30.9% | 13,930.39 € | |
| | Positive effects due to the reorganization of the tourist offering | 377,051.58 | 1.28 | 482,626.02 € | 81.5% | 0% | 89,172.19 € | |
| | Negative effects of saturation of the city caused by tourism | -1,070,772.80 | 1.28 | -1,370,589.19 € | 97.8% | 16.3% | -24,724.96 € | |
| | Attraction of tourists | 37,489.73 | 59.01 | 2,212,268.75 € | 0.0% | 85.8% | 315,234.22 € | |
| PUBLIC ADMINISTRATION | Increase in income from social contributions | 15 | 11,646.75 | 174,701.19 € | 0% | 88.8% | 19,594.12 € | |
| | Increase in income from taxes (IRPF) | 15 | 5,415.74 | 81,236.05 € | 0% | 88.8% | 9,111.27 € | |
| | Indirect savings in unemployment benefits | 15 | 11,480 | 172,200.00 € | 0% | 88.8% | 19,313.59 € | |
| | | | | | | PUBLIC ADM, | 48,018.98 € | |
| SUBCONTRACTORS | Greater business | 1 | 102,749.67 | 102,749.67 € | 0% | 0% | 102,749.67 € | |
| | Greater prestige of collaboration | 1 | 135,385.11 | 135,385.11 € | 63% | 0% | 50,769.42 € | |
| | | | | | | SUBCONTRACTOR | 153,519.09 € | |
| | | | | | | TOTAL | 2,701,998.02 € | |

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2
3 Thus, the application of these coefficients causes a very significant reduction of some impacts,
4 either by a high attribution or a very high deadweight.
5

6 As an example, we can highlight the change "identity with the cultural heritage of the city"
7 corresponding to stakeholder citizenship. It is almost completely reduced (attribution of 96.7%
8 obtained from the survey process). The reason is that the identification of citizens with their
9 cultural heritage is mainly attributed to the presence of the aforementioned singular monument,
10 which monopolizes the tourist and heritage attraction of the city as it is among the most visited
11 monuments in Spain.
12

13 Another change to highlight is the case of the "improvement in security" for the stakeholder
14 neighborhood. Although in their first impression one might think that the activity of the palace
15 should be able to generate a greater sense of security in the neighborhood where it is located,
16 the information obtained advises one to reduce this presumption. In fact, the results that were
17 obtained indicate that the perception of safety is greater in the city as a whole than in the
18 neighborhood itself (this is why the deadweight is greater than 100%) and that the improvement
19 in safety is due to factors other than the presence of the palace, such as the rehabilitation of the
20 neighborhood by the City Council (attribution of 86.2%).
21

22 In short, the purification coefficients fulfil the function of attributing to the palace exclusively the
23 amount of change that is actually derived from its existence (attribution) and that could not have
24 been produced without it since there are no alternatives in the market to cover its impacts at 100%
25 (dead weight).
26

27 **C. Determination of the SROI of the Palace**

28
29 As table 4 has shown, the palace generates approximately 2.7 million of social and economic
30 value distributed among different stakeholders. Comparing the value created by the palace with
31 the inputs (expenses of the 2016 financial year) necessary for the development of its activity (€
32 1,020,682.69), an SROI ratio of 2.65 is obtained.
33

34 This result means that in the first calculation of the SROI, for every euro invested by the foundation
35 in the palace, 2.65 euros of economic and social value are returned.
36

37 The visitors constitute a group of interest that receives the most impacts, which is almost half of
38 the total and practically twice as much as the second stakeholder in order of importance. In this
39 way, the study has brought to light the high level of satisfaction declared by visitors with the visit,
40 to which is added the high value they give to being able to enjoy an emblematic display of what
41 the *patios* represent during the whole year. The study also offers tools for the management of
42 tourist attractions by identifying that improving the knowledge of traditional ways of life is another
43 impact to highlight, and so it should be kept as part of the idiosyncrasy of the monument.
44

45 The second stakeholder that benefited most is the bank that owns the private foundation that
46 manages the palace. In this sense, a relevant change is the increase in loyalty and the
47 improvement of the entity's knowledge. However, for various reasons, it has not been possible to
48 quantify either the effect that this activity has on the employees of the bank, on the loyalty of
49 current customers or on the capture of new ones. It is not a problem for the methodology, as the
50 scope is not only to calculate the SROI but also to involve stakeholders and to understand the
51 different impacts generated by the activity.
52

53 Employees of the palace also experience important changes in terms of job creation and
54 satisfaction with their work. In addition, the results of the study have shown that the level of
55 identification of the staff of the palace is very high. This result is noteworthy because it occurs
56 despite the problems of adaptation to the positions that have arisen after the process of
57 restructuring and the internal reorganization of the work.
58

59 All citizens are also influenced by the presence of the palace in the city (receiving 14.8% of the
60 total impacts) since the tourist attraction of the monument complements the cultural activity and

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2
3 improves the identification of citizens with local heritage. In addition, given its location - away from
4 the main tourist center of the city - the palace contributes to decongesting some areas that begin
5 to emit signs of tourist saturation.

6
7 Finally, the neighbors should be another stakeholder that most benefits from the presence of the
8 palace in the neighborhood. However, the results of the study bring to light some areas of
9 improvement worthy of attention. On the one hand, the identification of the neighborhood with the
10 palace is not as close as one would expect (0.61 out of a maximum of 4, which means a value of
11 only € 4,595.19). Another issue that should be given some attention is the inconvenience caused
12 by noise as a result of the ordinary activity of the palace, especially when events or shows are
13 held at night. In this sense, it might be advisable to carry out neighborhood promotion campaigns
14 aimed at involving neighbors in the programming of the palace.

15
16 Other interest groups that have experienced positive economic impacts thanks to their
17 relationship with the palace are the hospitality industry (€ 41,238.97) and subcontractors (€
18 153,519.09), given the boost that the presence of the palace has exercised on these businesses.
19 Public administrations (€ 48,018.98) have also benefitted given the increase in public revenue
20 that occurs with the activity of the palace.

21
22 As it was already mentioned above, relativity in the quantification of impacts is one of the main
23 criticisms attributed to SROI method. However, the credibility of this tool should not be
24 undermined by the subjectivity in the evaluation of some of the factors that integrate it. In fact, the
25 search for evidences about the impacts by itself is a relevant contribution. To overcome this
26 limitation and correct potential skepticisms, sensitivity analysis was used. With this, it is expected
27 to increase the degree of confidence in the results obtained, verifying the effect that different
28 variations and scenarios would cause in the SROI results with respect to some of the most key
29 data. The objective is to simulate the value that the SROI would reach in the event of possible
30 changes in some significant variables, obtaining a confidence interval in which the SROI moves,
31 avoiding to assign a single value for which there is no absolute certainty, resulting a more credible
32 and defensible calculation of the SROI rate.

33
34 In this case, the sensitivity analysis has been built based on five elements (variables and proxies)
35 of the study according to two significant factors. On the one hand, the significance of the impacts
36 was considered, that is, those to which the SROI is potentially more sensitive. On the other hand,
37 priority was given to those elements that could have a greater component of subjectivity. The
38 elements evaluated were the following:

- 39 – The effect of the cost of appearances in local press on the impact "Image improvement"
40 of the Bank stakeholder. A variation of $\pm 10\%$ was simulated in the impact assessment,
41 given the great diversity in the price of the communication channels (press, radio,
42 signage...) used for the dissemination of the Palace's activity.
- 43 – The proxy of the impact " Enjoy the courtyards all year" of the stakeholder Visitors. It was
44 simulated how a change in the price of the ticket at € 5 would affect the result. This data
45 reflects the amount of the visit only to the outdoor courtyards, while tourists most often
46 visit the entire palace.
- 47 – The proxy average price to assess the impacts "Improvement of the knowledge of the
48 courtyards" and "Improving knowledge of traditional ways of life" was raised to € 7, based
49 on the fact that the price of a guided tour including the entrance to the Palace is € 15 (less
50 € 8 for ticket). This value has replaced the current proxy which is the average price of an
51 audio guide (€ 3.5), a value that could be underestimating the real change achieved.
- 52 – The daily tourist rate used to quantify various impacts on the neighborhood and
53 citizenship has risen to € 2.5, since this is the value that some local authorities have
54 recently proposed for tourism in the city.
- 55 – The dead weight of the impact "Attraction of tourists" on the stakeholder local citizens is
56 extremely uncertain since it is difficult to quantify what percentage of tourism would have
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visited the city, even if the palace did not exist. Given the importance of the main monument that monopolizes the tourist attraction in the city, it could be thought that the proportion of tourists that would visit the city thanks to the palace should be smaller, and, therefore, the dead weight would have to increase. These are the reasons why it was decided to introduce in the sensitivity analysis an increase of 10% in this variable.

- Finally, an additional simulation that includes the effect of a combined variation of all the elements considered was introduced. In this combined scenario, there was a slight increase in SROI, to a value of 2.72. The sensitivity analysis showed that the ratio can fluctuate from 2.42 to 3.09 depending on new case values (see Table 5).

Table 5. SROI Sensitivity analysis

| Change | Stakeholders | Previous value | New value | % change | % change SROI | SROI |
|---|---|----------------|---|----------|---------------|-----------|
| Costs of appearances in local press and radio | Bank | 672,122 | | ±10% | ±2.5% | 2.58/2.71 |
| Average price of entry- Enjoy the courtyards all year | Visitors | 7 | 5 (Price of entry- (only courtyards)) | -28.6% | -8.7% | 2.42 |
| Average price of an audio-guide, improvement of the knowledge of the courtyards and improving knowledge of traditional ways of life | Visitors | 3.5 | 7 (extra cost of the guided tour versus normal) | 100% | +16.6% | 3.09 |
| Average daily tourist rate- some changes | Local citizens and neighborhood | 1.28 | 2.5 (value proposed by local authorities) | 95.3% | +2% | 2.7 |
| Deadweight- Attraction of tourists | Local citizens | 85.8 | 94.38 | +10% | -7% | 2.46 |
| Combined changes | Visitors, local citizens and neighborhood | | | | +2.9% | 2.72 |

4. Discussion: contributions of SROI to the debate on the impacts of tourism

The objective of this article was to contribute to some of the debates regarding the social and economic impacts generated by tourism activities by using a methodology yet insufficiently explored in the field of tourism and its impacts: Social Return on Investment or SROI.

Using the analysis of a case as a guiding thread, we can observe how the application of this methodology allows one to know in depth the social value that the palace brings, the changes experienced by the interest groups that interact with it, and the theory of change that promotes the very existence of the palace.

Regarding the first debate identified in the state of the art, one of SROI's main contributions is that it can contribute to overcome the traditional debate between tourists and locals by explaining how the impacts (positive or negative) are distributed among the different actors involved and the causes that drive these impacts. In cities, where problems related to tourism are manifesting in many complex ways, the involvement and point of view of all stakeholders are fundamental as they can encourage the implementation of corrective or mitigating measures in certain tourism activities. This circumstance is appreciated in some way in the case study we evaluate.

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3 On the one hand, the results obtained have shown that visitors are the people who benefit the
4 most from the activity of the palace by having a cultural container and benefiting from the tradition
5 of the city and its courtyards open all year. However, as Table 4 shows, its impacts barely
6 represent 48% of the value generated by the Palace. This figure indicates the complexity and
7 diversity of tourist activities and the capillarity of their impacts, which strongly support the
8 application of participative and holistic approaches to evaluation like SROI.
9

10 A first approach to the results shows how, consistently with most literature, the residents of the
11 neighborhood where the palace is located are the only stakeholders in the city that receive an
12 overall negative impact. However, the application of SROI analysis offers two valuable insights
13 that complement this conclusion.
14

15 First, the materiality analysis provided by SROI (introduced in Table 2) shows how neighbors do
16 not give importance to indirect impacts that *a priori* could be considered much relevant, like
17 revaluation of real estate or infrastructure improvements in the neighborhood. One of the
18 principles of SROI is that the only impacts considered and valued should be those recognized by
19 the stakeholders experiencing that change, so maybe both private and public managers should
20 carry out communication activities addressed to neighbors to make noticeable the benefits that
21 tourist activities bring to their neighborhoods.
22

23 Second, the capacity of SROI to isolate each impact allows identifying the reasons of neighbors'
24 discontent: the noise produced by concerts and certain insecurity derived from said activity. But
25 it shows as well how other stakeholders also suffer punctual negative impacts, as the palace
26 employees (because their work reorganization) or citizens (because of the saturation of the city).
27 The identification of the exact sources of dissatisfaction for each stakeholder can help managers
28 to implement specifically addressed measures to alleviate them.
29

30 The second debate identified in the state of the art is one of the main challenges that the tourism
31 industry faces today: the saturation that affects renowned destinations such as this one, which
32 reflects the hidden face of tourism success. As we have witnessed this is a hot topic on tourism
33 literature, and even if our case is unable to close the debate, it offers a complementary point of
34 view that could enrich it.
35

36 At the municipal level, the SROI analysis has shown that the activity of the palace generates
37 impacts in the city, both positive and negative. However, the results obtained warn that the
38 palace's contribution to tourist saturation represents only 5.8% of the global benefits (that is, the
39 sum of the positive impacts on citizenship) that are derived from the cultural and tourist activities
40 of the palace. Both the public administration and the private sector should value and make these
41 figures public by carrying out pedagogical work with citizens aimed at understanding the benefits
42 that the city receives. In this way, this process will develop more tolerant behaviors with tourists,
43 thus assuming that the small inconveniences generated by the presence of tourists in the city are
44 a minor problem.
45

46 The third contribution derived from the SROI methodology to the state of the art on impacts of
47 tourism is related to the management of tourism activities. The hermeneutical knowledge of the
48 needs and interests of each group of stakeholders can guide decision-making in management by
49 establishing a channel of dialogue with its stakeholders while improving transparency and
50 accountability. It has already been stated that the isolation of impacts is one of the strengths of
51 the SROI methodology, as it can inform the decisions taken by managers in a more adapted way,
52 contributing to spread benefits and cost more equally. Therefore, managers could focus their
53 efforts with greater efficacy, addressing their activities towards the preferences revealed by their
54 stakeholders in the materiality analysis exposed in Table 2.
55

56 In conclusion, the case study introduced in this article has allowed us to obtain reliable evidence
57 of the contribution of the palace to welfare, cultural knowledge and the development of the city.
58 The verification of the impacts that have occurred (tangible, as is the case of employment or
59 increased income from tax collection, and intangible, such as a greater identity with the cultural
60 heritage of the city) is, by itself, a significant contribution towards the legitimacy of the Foundation.

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3 Nonetheless, in addition, this process can become an accredited instrument for setting strategies.
4 The definition and quantification of impacts are elements of learning to identify areas for
5 improvement. In addition, these processes can serve to raise awareness of the truly important
6 issues in the development of the activity and help in this way to set priorities.
7

8 Finally, although the SROI is a methodology that is applied to the evaluation of specific activities
9 or organizations, by making a multifactor analysis, its results and conclusions can also inform
10 policies and strategies of these other actors related to the intervention. For example, the case
11 study presented can derive the need for the city council to undertake awareness campaigns that
12 highlight the general contributions of tourism in the face of very specific negative impacts.
13 Additionally, it can precisely show what kind of activity can be promoted to minimize the negative
14 impacts on the groups most affected by the intervention: the neighbors.
15

16 **5. Limitations and future lines of research**

17

18 Despite the undeniable virtues of the SROI method, which allows one to capture the social value
19 that is not reflected in conventional financial accounting, this methodology also has some
20 limitations that should be highlighted. These limitations come fundamentally from the difficulty that
21 exists in obtaining a unique value that can completely and accurately capture the total social
22 impact of the palace. The social value obtained in this research is the result of multiple
23 assumptions, such as the stakeholders to be included in the analysis, the outcomes to be
24 considered or the approximations to the financial values used to quantify these.
25

26 In addition, the lack of comparability between different actions and organizations because of the
27 influence of temporal aspects, resources and capabilities or the influence of one's own
28 environment are limitations. Thus, each evaluated project has its own peculiarities that make
29 comparability impossible.
30

31 With the intention of overcoming some of these limitations, future research should be directed, on
32 the one hand, to try to establish some type of benchmarking and, on the other hand, to generate
33 repositories of proxies and a standardization of certain aspects to be considered in the process
34 of responding. In this way, we could analyze how similar experiences evolve in dissimilar contexts
35 or investigate the particularities of different projects in similar environments. The objective would
36 be to isolate the effects of the intervention and the context to better understand what weights
37 represent one and the other in the final result.
38

39 Finally, yet importantly, we can find a last critique to SROI, related to the monetarization itself of
40 the social impacts on how it could reinforce neo-liberal arguments. One can argue that investors
41 could actually use SROI evidence against preservationists and lobby for forms of development
42 that bring in more SROI, without filtering or clearly explaining which the sources of social value
43 are.
44

45 This risk reinforces the idea that the SROI analysis cannot be reduced to the final ratio that relates
46 the economic value of the inputs with the outcomes. The value of the SROI ratio must be
47 considered with caution, and always interpreted within the holistic context of the evaluation
48 process. The monetization of the impacts is an essential element of the process, but it is not the
49 only contribution of SROI. The methodology goes beyond obtaining a simple number, since it
50 describes the entire process of creating value and contextualizes the information that allows a
51 correct interpretation of the ratio. What is crucial is how the methodology can contribute to
52 extracting valuable learning to guide decision-making, based on evidence and following the theory
53 of change. Definitely, its interpretation, communication and analysis will allow to propose
54 initiatives for continuous improvement and favor a more efficient use of resources to create social
55 value in our societies.
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