

MARKETING, INTERNACIONALIZACIÓN Y TURISMO DEL PATRIMONIO CULTURAL: REVISIÓN BIBLIOGRÁFICA

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RESUMEN

El propósito de esta investigación es describir las variables de mercado utilizadas en la literatura para evaluar la internacionalización de los destinos turísticos con una propuesta de valor que involucra el Patrimonio Cultural. Una revisión sistemática de la literatura fue una estrategia metodológica, con una franja temporal de observación que abarca 2005-2017 y que utiliza Scopus y Web of Science. Las variables más relevantes son la gestión de marketing, el comportamiento del consumidor, las comunicaciones de marketing integradas, los pronósticos de demanda y el marketing y la marca de Destination. Los hallazgos explican los principales aspectos que deben ser gestionados por los operadores, el gobierno y las partes interesadas para la internacionalización del turismo del patrimonio.

Palabras clave:

Turismo cultural; Patrimonio cultural; Márketing; Internacionalización; Revisión sistemática de la literatura.

MARKETING, INTERNATIONALIZATION AND HERITAGE TOURISM: SYSTEMATIC LITERATURE REVIEW

ABSTRACT

The purpose of this research is to describe the marketing variables used in the literature to assess the internationalization of touristic destinations with a value proposition involving Cultural Heritage. A Systematic Literature Review was methodological strategy, with an observation window encompassing 2005-2017, and using Scopus and Web of Science. The most relevant variables are Marketing Management, Consumer Behavior, Integrated Marketing Communications, Demand Forecasts and Destination’s Marketing and Branding. Findings account for the main aspects to be managed by operators, government and stakeholders for the internationalization of heritage tourism.

Key Words:

Cultural Tourism; Cultural Heritage; Marketing; Internationalization; Systematic Literature Review.

1. Introduction.

Cultural and Natural Heritage comprise tangible and intangible dimensions. Tangible dimensions are represented by objects of lower and higher scale, those of lower scale include personal property such as fauna and flora species, monuments, artistic works, handicrafts, goldsmithing, files, manuscripts, documents and objects considered to have any historic value; those of higher scale are real property that includes natural landscapes, archeological sites, vernacular areas, historic buildings and cities.

Therefore, the intangible dimension is represented by cultural practices and manifestations, such as histories, tales, languages, dialects, customs, music, ritual dance, festivities and gastronomy. The aforementioned, and all of the tangible heritage constitutes the legacy and tradition that has been transferred from generation to generation throughout the existence of mankind, as declared by the United Nations Educational, Scientific and Cultural Organization – UNESCO – these places in our surroundings with exceptional universal value are listed as heritage (UNESCO, 1972).

In this respect, the Convention Concerning the Protection of the World Cultural and Natural Heritage (signed in Paris in 1972) established the dynamics for 190 countries that have currently ratified the Convention, a list amounting to 1,007 sites – 779 of which are considered Cultural Heritage, 197 Natural Heritage and 31 mixed properties – (UNESCO, 2017b).

It is relevant to say that the Convention is intended as a conservation tool to preserve cultural and natural sites, since it enables protection from climate change, disproportionate urbanization, mass tourism and natural catastrophes, as it also takes into consideration the socioeconomic development regarding sustainability, a management challenge in this sphere (Mckercher and Du Cros, 2002; Chhabra, 2009). That said, this document adopts the definitions of Cultural and Natural Heritage implemented by the Convention (UNESCO, 1972), and heritage will be understood as such.

Nevertheless, an account of the awareness of the Cultural Heritage notion is palpable in the compendium of charters, recommendations and international treaties concerning heritage protection and safeguarding, the following selection includes key documents that recognize Cultural Heritage; however, despite an abundance of documents on this topic, these are not all included given the appropriateness and flow required of this document.

In chronological order, international documents regarding protection and safeguarding of Cultural Heritage are the Athens Charter (1931), the Roerich Pact (1935), the Convention for the Protection of Cultural Property in the Event of Armed Conflict of The Hague (1954), the Recommendation of the meeting in Paris (1962), the Venice Charter (1964), the Norms of Quito (1967), the Convention of Paris (1972), the Declaration of Amsterdam (1975), the Recommendation of the meeting in Nairobi (1976), the Florence Charter (1982), the Washington Charter (1987), the Recommendation of the Meeting in

Paris (1989), the Charter of Krakow (2000), the Charter of Paris (1993), Nizhny Tagil Charter (2003), Charter on Cultural Routes (2008), Recommendation on the Historic Urban Landscape (2011).

Following this chronological order, it is relevant to point out that some documents arose from the needs in specific historical moments that led to the reflection on Heritage, such as the First and Second World Wars, reflected in the Athens Charter (1931), the Roerich Pact (1935), the Convention for the Protection of Cultural Property in the Event of Armed Conflict of The Hague (1959), and the Recommendation of the meeting in Paris (1962), which give relevance to the conservation, preservation and restitution of the world’s Artistic and Archeological Heritage (1990) and to the institutions dedicated to science, art, education and conservation of cultural elements regarding the care of artistic and historic monuments, a matter resumed by posterior regulations such as the Washington Charter (1987).

Likewise, some documents were written to define matters concerning public policy and heritage management, such as the Venice Charter (1964) in which the comprehension of historic monuments, its architecture, urban or landscape environment apply to large and modest works of cultural significance; and the Recommendation of the Meeting in Paris (1989) which stated that all creations from a cultural community and justified in tradition must be considered Cultural Heritage; it is important to say that the matter of Urban Cultural Heritage is considered again in the Recommendation on the Historic Urban Landscape (2011).

The Recommendation of the meeting in Nairobi (1976) defines matters such as historic or traditional groups, means and safeguard; the Charter of Krakow (1999) for defines Heritage and the Charter of Paris (2003) defines Cultural and Intangible Heritage. Some other documents clarify that heritage and its cultural value should not be disdained when involved with tourism, on the contrary, public attendance and its admiration may increase its relevance and significance for foreigners and for locals (ICOMOS, 1967), this tension is also addressed in this topic’s previous literature (Kolar and Zabkar, 2010; Buonincontri, Marasco and Ramkissoon, 2017; Caust and Vecco, 2017); also, the regulations of the aforementioned Charter on Cultural Routes (2008) reference the routes that might be of interest, not just in terms of heritage, but regarding tourism as well.

Some other have arose to confirm the need of cooperation between related actors in regards of heritage, such as the Declaration of Amsterdam (1975), this document constitutes the first time in which the notion of heritage was considered a group and not just as isolated and segregated monuments, a fact that had enabled a biased view of Natural and Cultural Heritage.

Other documents propose keys to the regulation’s operation, such as the Operational Guidelines for the Implementation of the World Heritage Convention (1992, 2017a) – and its updates –, the introduction of which generated a turning point in the framework of the Cultural Heritage definitions because it included different components to build the notion of Cultural Landscapes, while other definitions may still emerge, such as those in the document on Cultural Heritage Authenticity (ICOMOS, 1994).

Consequently, a more complex but holistic and systemic notion indicates that Cultural and Natural Heritage must be addressed as territorial spheres with tangible and intangible dimensions, and that may be classified on a macro scale into Cultural Landscapes, Natural Landscapes and Historic Urban Landscapes, the latter comprises the two prior categories; likewise, all of them are susceptible to sustainable touristic activities that imply the use of marketing aimed at internationalizing the destination.

It is worth mentioning that Cultural or Heritage Tourism (visiting monuments, historic sites, museums, events, festivals or any other cultural manifestations) is the oldest touristic activity, although it was only recognized as such in the 70's; there is also a relevant relation between Cultural Heritage management, its promotion with marketing tools, and Cultural Heritage tourism (Mckercher and Du Cros, 2002). On the other hand, and as evidenced in prior literature review exercises, for instance by Chang and Katrichis (2016), there is a lack of work in terms of conceptual review that might shed a light on the future of tourism management.

Considering the reasons exposed in this introduction, it is relevant to conduct an exercise aimed at describing the marketing variables that have been used in literature to assess the internationalization of touristic destinations with a value proposition that involves Cultural Heritage, using a structured methodologic strategy such as Systematic Literature Review.

2. MARKETING IN THE INTERNATIONALIZATION OF CULTURAL HERITAGE.

Tourism is an economic activity that influences a country's economic development and social capital, its nature involves consumption of experiences, so much that it is considered entertainment, its (complicated) control or foresight demand by managers drives planning and execution actions (Mckercher and Du Cros, 2002).

Likewise, the course of history affects tourists' behavior, and therefore, experience design aimed at tourists, this matter has been addressed by Urry (1990) from perspectives such as industrial revolutions with respective time spaces for employees' vacation, the author also mentions aviation as a relevant milestone that allowed the tourism sector to grow, particularly in terms of Cultural Heritage.

Hence, not all cultural assets are touristic attractions, the definition of what is to be considered as Cultural Heritage Tourism – or Cultural Tourism – contemplates the touristic, inherent aspects to the Cultural Heritage, consumption of experiences and products, and the tourist (Mckercher and Du Cros, 2002). The initial literature specialized in the topic has conceptualized an essential requisite for the consumption of Cultural Heritage: authenticity (Wang, 1999; Waitt, 2000; Kolar and Zabkar, 2010).

Consequently, authenticity (as a construct), has been evaluated on specific cases and from different conceptual stances (Apostolakis, 2003; Chhabra, Healy and Sills, 2003; Ramkissoon and Uysal, 2011; Zhou, Zhang and Edelman, 2013), since each Cultural Heritage destination has diverse distinctive traits in comparison with others and a diverse evolution on the topic (MacCannell, 1973).

From a marketing perspective, Mckercher and Du Cros (2002) explain the transformation of Cultural Heritage into a cultural tourism product, the authors indicate the following as common requisites for said transformation: existence of a story to tell or transmit – a coincidence with Kim and Youn (2016) –, the Cultural Heritage asset as a living thing – meaning a link between past and present, evoking the fantasies of the prospective consumer –, a participative, relevant and permanent experience for the tourist focused on quality and authenticity, in order to achieve consumer involvement (Bryce *et al.*, 2015).

The literature agrees on the fact that, to build the image of a destination, it is indispensable to consider the consumer's characteristics and perceptions (Baloglu and McCleary, 1999), aside from the sites' attributes, and its awareness in the consumer, before, during and after the visit (Poria, Butler and Airey, 2003). That is how Richards and Wilson (2006) explain culture's serial reproduction phenomenon and

present creativity as an alternative from the point of view of supply and demand, with the aim of breaking the limitations of traditional cultural tourism and creating cocreation processes (Bryce, Murdy and Alexander, 2017), which should also foster the inclusion of the Cultural Heritage site’s local community (Paddison and Biggins, 2017).

The literature has also found a relevance in tackling Cultural Heritage from distinctive aspects, i.e., gastronomy (Okumus *et al.*, 2013) and festivals (Yeh and Lin, 2017), without setting aside strategic matters such as brand management in places declared World Heritage sites (Ryan and Silvanto, 2014; Apostolakis *et al.*, 2015; Hassan and Rahman, 2015), the role of the consumer or tourist (Mansour and Ariffin, 2017), and the stakeholders (Cassel and Pashkevich, 2014; Alexander and Hamilton, 2016; Lochrie, 2016; Gregory-Smith *et al.*, 2017; Wolf, Ainsworth and Crowley, 2017).

3. METHOD.

The nature of the research conducted in this article is documentary, and its result exclusively screens findings related to Cultural Heritage Tourism. It presents recent perspectives on the marketing variables used in the literature to assess the internationalization of touristic destinations with a value proposition involving Cultural Heritage. Therefore, the first process conducted was a Systematic Literature Review following the parameters indicated in the protocols (Kitchenham, 2004; Pérez-Rave, Álvarez-Jaramillo and Henao-Velásquez, 2012; Chicaíza-Becerra *et al.*, 2017).

A contrasting process followed, it was conducted using the *Tree of Science*© (Robledo-Giraldo, Osorio-Zuluaga and López-Espinosa, 2014) tool, which identified the literature to be used as seminal, structural and emerging through the graph theory; this process determined the screening of Cultural Heritage Tourism findings. All of this led to procedures that implied: definition of the research question, selection of key words, definition of observation windows, selection of resources and construction of search equations, all of which are described below.

3.1. Definition of Research Questions.

The research questions concerning this documentary research were: What are the marketing variables that have been used in the literature to assess the internationalization of touristic destinations? What are the specific marketing variables for touristic destinations with a value proposition involving Cultural Heritage? And, what are the future research progress or perspectives for marketing touristic destinations with a value proposition involving Cultural Heritage?

3.2. Selection of Key Words

For the first process– Systematic Literature Review – the following key words were used: *Tourism, Marketing and International*, it is worth indicating that diverse variations, syntagma or related words were used aimed at testing and using the most pertinent equation; as previously indicated, this article presents a result of said search equation exclusively screening Cultural Heritage findings. The second process – contrasting – was conducted in *Tree of Science*© and the word *Heritage* was added to the key words.

3.3. Definition of Observation Window

Given the nature of the questions asked and the topic’s progress in scientific literature, the observation window included documents from 2005 onwards, the closing date of the revision was December 27th, 2017. It is relevant to mention that the *Tree of Science*© tool analyzes citation networks using the

following parameters: degree of entry and exit; meaning that articles with a high entry degree and zero exit degree are seminal or “core”; articles with high entry and exit degree are structural or “branches”, more recent articles have a high exit degree and a zero entry degree, meaning that they are emerging or “leaves”; for all of this, the tool draws information from the citations of each document in the equation, thus eliminating a possible temporary bias within the observation window.

3.4. Selection of Resources

Scientific literature and official sources were consulted in order to have a proper view of the topic. Firstly, the data base Scopus® was used in the overall search equation and in the Systematic Literature Review process; likewise, *Web of Science* was used in the screening and contrasting process with the *Tree of Science*© tool. Secondly, the official sources consulted included organizations specializing in matters inherent to Cultural Heritage, such as the UN, UNESCO, ICOMOS and TICCIH.

3.5. Construction of Search Equations

Initially, the equation executed in Scopus® was: “(TITLE-ABS-KEY (tourism AND internatio*) AND TITLE-ABS-KEY (marketing OR management)) AND PUBYEAR > 2005”. While for the contrasting exercise in *Web of Science* it was: “Topic: (tourism) AND Topic: (marketing) AND Topic: (heritage)”. For the first one, the observation window was the limiting factor; while the latter was left open with the objective of having all the information possible to contrast and refine in *Tree of Science*©.

4. RESULTS.

1,779 titles were reviewed, and following the information refinement process, 344 abstracts complied with the inclusion and exclusion criteria, both of them have a growing trend in the time span of the publications. Accordingly, the tourism topics that concern the literature are: Tourism Management – 130 abstracts –, Destination Management – 77 –, Cultural Heritage Tourism – 51 –, Internationalization Affair Management – 31 –, Health and Wellbeing Tourism – 23 –, Hotel Management – 18 –, Sports Events Tourism – 12 –, and Tourism Research in terms of Marketing and Internationalization – 2 –. It is worth mentioning that from this point forward, results’ report will concentrate on those articles that have a tourism sphere in Cultural Heritage

4.1. Marketing Variables in the Internationalization of Cultural Heritage Tourism and Geographic Location of the Articles’ Empirical Validations.

The marketing variables in terms of tourism internationalization identified in the literature for the Cultural Heritage sphere are: Consumer Behavior (23 documents), Branding and Destination Marketing (17 articles), Marketing Management (6), Integrated Marketing Communications (3) and Demand Forecast (2). Likewise, as illustrated in **Error! Reference source not found.**, the geographic location of Cultural Heritage’s empirical validations that tackle tourism internationalization and marketing is predominantly in Asia, Oceania, Europe and North America; the following is a detail of the content of the articles addressing tourism internationalization for the Cultural Heritage sphere, as per the marketing variable selected by the authors.

4.1.1. Consumer Behavior in the Cultural Heritage Internationalization Framework

The first aspect to highlight is that Cultural Heritage Tourism has diverse symbolic representations by consumers, which is why a destination having unique cultural aspects is practically a commodity in the internationalization management framework (Maccarrone-Eaglen, 2009), which ultimately is a matter of authenticity and representation of distinctive aspects based on marketing tools (Jiang *et al.*, 2016).

The second relevant aspect is being able to profile consumers and assess their perceptions and motivations to visit the destination, which has been reviewed for Cultural Heritage in terms of gastronomy (Smith, Costello and Muenchen, 2010; Chang, 2011; Adongo, Anuga and Dayour, 2015; Akroush, Al-Mohammad and Odetallah, 2015; Jiménez Beltrán, López-Guzmán and Santa-Cruz, 2016) and enotourism (Wei, 2013; Carlsen and Boksberger, 2015), as well as for festivals (Xiaoyang, Tobias and Werner, 2011; Báez and Devesa, 2014) and Cultural Heritage visits specifically associated to natural landscapes (Chen and Chen, 2015; Radder, Han and Theron, 2016).

The third aspect to be highlighted is the tourists' segmentation of Cultural Heritage depending on the activities they conduct or intended to conduct while visiting (Yan *et al.*, 2007; Ashwell, 2015; Ispas, Constantin and Candrea, 2015; Ruhanen, Whitford and McLennan, 2015), in which possible differences between foreign tourists and residents are not ignored (Jani and Philemon, 2016; Su and Wall, 2016). Additionally, in this framework there are research works that review phenomena inherent to the consumer's perceptions using transcultural research design (Kay and Meyer, 2013). The consumer's perception has also been assessed in terms of the relevance of Cultural Heritage conservation (Ahmat, Omar and Mustaffa, 2016)

The fourth aspect is the interest of the literature in reviewing financial matters from the consumer's perspective, such as willingness to pay, Mmopelwa, Kgathi and Molefhe (2007) review it in the case of natural Parks in Botswana, while Saayman and Rossouw (2010) assess it in aggregate to evaluate the impact of consumption on employment generation and income of Cape Town's International Jazz Festival.

4.2. Branding and Destination Marketing in the Cultural Heritage Internationalization Framework. Each Cultural Heritage destination has particular aspects that distinguish it from others, destination marketing implies the exploitation of those essential differences in order to promote experiences to be enjoyed by tourists. Brown (2009) addresses the case of Cape Breton Island in Canada, a place that has taken advantage of its Celtic music tradition to develop Cultural Tourism, as the author names it. Similarly, Richards and Toepoel (2016) elaborate on the fact that events and festivals that may be considered Cultural Heritage, are, in turn, manifestations of experience economics that can be exploited to promote the destinations. Consequently, festivals are a destination's brand positioning tool, since the recognition of a city, with its distinctive activities and particular experiences, refer its local identity to foreigners and increase the residents' sense of belonging (Arellano, 2011).

However, the branding exercise for a Cultural Heritage destination implies addressing technical measures to guarantee its differentiation and quality promise, backed up by UNESCO's World Heritage List (Ryan and Silvano, 2009; Brown, Baldwin and Chandler, 2015), without ignoring the political affairs it involves (Brown *et al.*, 2015; Lai and Ooi, 2015). Similarly, and for the specific case of Xi'an, Rothschild, Alon and Fetscherin (2012) show that the branding exercise implies an assessment of the functional and emotional dimensions that might belong to a destination from the consumer's perspective.

Babolian (2016) reviews foreign tourists' experiences related to gastronomy in Indonesia, aimed at assessing their satisfaction and the destination's distinctive image, the author concludes that destinations may be differentiated using food that sets them apart from others. Likewise, the literature has assessed a phenomenon that has been called Film-Induced Tourism, in which locations such as Seville in Spain have a huge opportunity to positively impact tourists, thus it may be used as an advertising resource by destination managers (Oviedo-García *et al.*, 2016); there are empirical validations in this Spanish area

that review destination marketing from the perspective of Cultural Heritage’s distinctive aspects, i.e., Flamenco (Thimm, 2014).

Additionally, another aspect to highlight in the Destination Marketing research is the review of opportunities such as Cultural Heritage promotion, for instance, developing Islamic tourism in countries like Malaysia (Bhuiyan *et al.*, 2011), Bay of Bengal, which has beach tourism as well as remarkable Cultural Heritage, expanding the possibilities of marketing to attract tourists (Mohanty and Rout, 2016). Therefore, a destination that has Cultural Heritage, be it declared or by conviction of local authorities, is a location where historic conservation is to be promoted to foster business and revitalize trade, such as with employment generation (Brebba *et al.*, 2015; Kwanya, 2015).

4.3. Demand Forecast, Integrated Marketing Communications and Marketing Management the Cultural Heritage Internationalization Framework.

This item clusters marketing topics that appear less frequently in the Systematic Literature Review in terms of internationalization of Cultural Heritage, but that are not set aside due to their relevance: Demand Forecast, Integrated Marketing Communications and Marketing Management in itself.

Firstly, there is an evident concern in the literature to estimate tourist demand for destinations such as old towns, since planning and management are crucial in this case to review seasonality or fluctuations (Guo and Sun, 2016), and to assess actions pertaining conservation. Also, the literature has assessed the matters of public order and terrorism, which have an effect on tourist attendance and demand to certain destination, even if it is considered of cultural and heritage interest (Perles-Ribes *et al.*, 2016).

Secondly, Integrated Marketing Communications are a matter of interest to the literature of Cultural Heritage because there is limited information on promotional strategies and its efficiency as an instrument to increase the demand in these places; accordingly, Li, Whitlow, Bitsura-Meszaros, Leung and Barbieri (2016), evaluated websites of countries with high touristic attendance and that have sites in the World Heritage List, such as Australia, China and Mexico, and found five dimensions that may be subject to similar evaluations, as follows: communication, site’s attractiveness, marketing strategy effectiveness, technical design and the specific aspects of Cultural Heritage.

The literature acknowledges the potential of gastronomy as a matter of Cultural Heritage to be used as strategic tool to increase a destination’s demand, Ottenbacher and Harrington (2013) study the case of campaigns in southern Germany aimed at assessing: cooperation needs between stakeholders, leadership, promoted culinary profile, communication quality and tourists’ perceptions.

Thirdly, the literature calls the use of marketing to manage matters such as: coexistence between Cultural Heritage and urban renovation (Rátz, Smith and Michalkó, 2008), development of indigenous tourism (Fletcher, Pforr and Brueckner, 2016), divergence between the user’s experience and conservation (Fefer *et al.*, 2016) and the locals and tourists’ wellbeing (Angeloni, 2013).

5. DISCUSSION AND CONCLUSIONS.

This document finds marketing variables in the internationalization of Cultural Heritage tourism, to do so, a review on the sphere’s regulation background was conducted, along with a Systematic Literature Review process with the topic’s content in Scopus, which in turn was validated with the content of *Web of Science* and the *Tree of Science* tool.

The following variables were found: Consumer Behavior, Branding and Destination Marketing, Demand Forecast, Integrated Marketing Communications and Marketing Management. These results are united with document collection since they account for the planning relevance and execution as illustrated by Mckercher & Du Cros (2002). This article also accounts for the relevance of authenticity for the consumer, as found in previous works (Apostolakis, 2003; Chhabra, Healy and Sills, 2003; Ramkissoon and Uysal, 2011; Zhou, Zhang and Edelman, 2013).

The variable of Destination Marketing agrees that destination’s image construction is an aspect in which the consumers’ characteristics and perceptions must be taken into account, as indicated by Baloglu & McCleary (1999). This article reveals, unlike previous literature, that the variables of Demand Forecast and Integrated Marketing Communications have not been given enough relevance in the case of internationalization of Cultural Heritage tourism.

Nonetheless, the main limitation of this review and of others, is the possible outdatedness of its content given the large amount and constant production of scientific literature, however and in the interest of compensating this limitation, alerts were used to keep up with updates, even while the document was being written.

This article identifies matters to be solved in this field, such as the harmonization of destination marketing with cultural landscape management, as well as the application of the charters and recommendations of different international organizations to serve as tools to manage and safeguard Cultural and Natural Heritage and to adequately promote the destinations.

Consequently, and although UNESCO’s recommendations regarding Historic Urban Landscapes seem to be “the” theory in Cultural and Natural Heritage, they only make sense if they allow to broaden and classify the concept of Natural Landscapes, Cultural Landscapes and Historic Urban Landscapes, since these deserve to be considered clearly defined protection and safeguard areas, and constitute the right track to a prospective sustainable tourism proposal within the framework of their tangible and intangible dimensions (exposed at the beginning), hence, this is a reminder for marketing management to tackle a proper balance in this sphere.

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CONFLICTS OF INTEREST

The authors declare no conflicts of interest

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