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Heritage Marketing for Made-in-Italy industries.
An in-depth analysis of the Marche Region's wine sector (Italy)

SUPERVISORI DI TESI
Chiar.ma Prof.ssa Mara Cerquetti
Chiar.mo Prof. Tonino Pencarelli

DOTTORANDA
Dott.ssa Annamaria Romagnoli

COORDINATRICE
Chiar.ma Prof.ssa Benedetta Barbisan

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CHIS –Corporate Heritage Identity Stewardship

CoO– Country of Origin

ICH –Intangible Cultural Heritage

ICT – Information and ComunicationTechnology

OIV – International Organisation of Vine and Wine

OUV – Outstanding Universal Value

QEM –Quality Evaluation Method

RBV –Resource Based View

SDGs–Sustainable Development Goals

UN – United Nations

UNDP – United Nations Development Programme

UNEP –United Nations Environment Programme

UNESCO WHL – UNESCO World Heritage List

UNWTO –United Nations World Tourism Organization

WAI –Web Assessment Index

WTTC – World Travel & Tourism Council

Introduction

«Having a heritage does not in itself create value, only the opportunity to do so» (Urde *et al.*, 2007). These words written by Urde, Greyser e Balmer in the seminal paper "Corporate Brands with a Heritage" well express the understanding that the value of heritage is not an automatic outcome but rather emerges through strategic efforts and thoughtful actions undertaken by organisations to leverage their corporate heritage.

This perspective aligns well with the Resource Based View (RBV) (Barney, 1991), a management theory that suggests that to achieve and maintain a competitive advantage, a company must possess and exploit valuable, rare, inimitable and well-organised resources. The scientific literature on heritage marketing strongly supports the idea that the success of companies depends on their ability to capitalise on the distinctive characteristics of their products and the symbolic values associated with them.

Within this framework, the originality of this thesis lies in the exploration of the potential role of external cultural resources within heritage marketing strategies. Furthermore, given the limited investigation of the relationship with place in the literature, the thesis also aims to understand the relationship between a company and its milieu. Finally, it aims to understand the impact of the inclusion of these aspects in heritage marketing strategies on local sustainable development, with particular reference to the possible impact on tourism.

The foundations of this research are not in the disciplines of economics, marketing or management, but result from an in-depth reflection on the concept of cultural heritage. In the following section, therefore, it is explained how cultural heritage has changed over time, evolving from a source to a resource. This theoretical premise is crucial to understanding not only why cultural heritage is considered a potential source of competitive advantage for companies, but also why its inclusion in heritage marketing strategies should generate benefits not only for the company itself, but also for the territory in which it is rooted. This perspective favours the cross-fertilisation between cultural heritage studies and those in the field of marketing, specifically in the field of heritage marketing.

1. Theoretical premises

According to Pine and Gilmore (2007), in the globalised world, authenticity is "what consumers really want". Indeed, in the current markets, consumption processes are strongly influenced by a growing demand for authenticity, which emerges as a cultural counter-force to the deterritorialisation resulting from globalisation. The role of cultural heritage could be fundamental in that it represents a unique and irreplaceable resource to which consumers attribute significant symbolic meanings (Cerquetti & Montella, 2012). However, awareness of the use value of local cultural resources and their potential inimitable competitive advantage, is still low and needs to be increased, in particular among entrepreneurs. As widely discussed in the cultural heritage literature (Montella, 2009; Fairclough, 2009; Cerquetti, 2014; Cerquetti, 2017), cultural heritage is a complex and dynamic concept. In this context, it is interesting to propose a reflection on how the concept of cultural heritage has changed over time and why today it can also play an important role for the corporate world, especially for the Made-in industry.

Indeed, if culture is a difficult concept, "at once utterly familiar, but also complex and hard to fully pin down" (O'Brien, 2014, p. 2; see also Rosenstein, 2016), it is even more difficult to define the meaning of cultural heritage. On the one hand, this concept is affected by the evolution of the meaning of culture; on the other, given its relational and interactive nature, it is defined and constantly reshaped by the relationships people have with their environment. Cultural heritage is not an intrinsic property of objects, but a construction, an invention, "a matter of perception" (Schofield, 2016, p. 3). It is:

> something which is created by contemporary thought and social action; heritage, simply does not exist as a set of things [...] but rather as a multitude of approaches and perspectives that refer to how we think about and choose to manage those things (Schofield, 2015, p. 198).

As a social practice (Poirrier, 2004), cultural heritage is not only varied and dynamic (Van Velthem *et al.*, 2017) but also variable and uncertain. Its definition is always historically determined and cannot be equated with the much greater fixity to which, for example, a legal-administrative definition is bound (Galasso, 1991, p. 8). It is undergoing constant transformation: it has changed over time, is currently changing and will change in the future. It can mean anything and everything (Fairclough *et al.*, 2008)

As argued by Bottesi (2018, p. 127), the notion of cultural heritage should be based on an epistemological uncertainty acting as a stimulus for the search for new certainties, in a virtuous cycle that does not reify ideologies and experiences, but promotes their continuous transformation according to the needs of society. This implies moving away from the perception of cultural heritage as a static, "immutable document" (Lattanzi, 2013, p. 5) and accepting its artificiality as the result of an ongoing process of selection, interpretation and transmission (Battilani, 2017).

In this context, a two-way process emerges for analysing the identification of cultural heritage, its determinants and effects. On the one hand, the notion of cultural heritage is culturally determined by human beings as members of a society; on the other, the notion of cultural heritage affects how society approaches cultural heritage identification and management. Following Smith (2006, p. 14), we can conclude that:

> the way people talk about, discuss and understand things, such as "heritage", have a material consequence that matters. In addition, not only is discourse "used" to do things by actors, but discourses also do things to actors and are productive independently of actors [...]. As such, discourses are "inherently positioned", and so the collection of ideas, concepts, and categorizations regarding heritage give rise to different ways of "seeing" the social practice of managing "heritage" according to the positions of social actors (Smith, 2006, p. 14).

The evolution of cultural heritage and its role in society is therefore an ongoing process, it has changed over time and will continue to change in the future. Although fragmentary and full of gaps, legal definitions can be a useful resource for understanding these changes as they recognise cultural changes in society as they occur.

Looking at the UNESCO Conventions, the concept of cultural heritage started out at the centre of the international debate, mainly in relation to its protection. The discussion intensified after the Second World War, which had caused extensive damage to cultural heritage. Regulations for the defence of cultural heritage in cases of conflict already existed (Article 56 of the second Hague Convention on the laws and customs of war on land, 1899; Articles 27, 28, 56 of the fourth Hague Convention on the laws and customs of war on land, 1907; Roerich Pact, 1935), but the international community considered whether more effective protection measures were necessary.

For this reason, under the aegis of UNESCO, the Convention for the Protection of Cultural Property in the Event of Armed Conflict was signed in the Hague in 1954.

One of the most interesting concepts introduced by the 1954 Convention was that of "cultural property". This is the first time the term is used in an international document. In previous papers, a very restricted category of cultural objects was considered worthy of protection, which can be summarised as "historical monuments", "works of art" and "works of science". The 1954 Convention formalised a broader term that included:

> (a) movable or immovable property of great importance to the cultural heritage of every people, such as monuments of architecture, art or history, whether religious or secular; archaeological sites; groups of buildings which, as a whole, are of historical or artistic interest; works of art; manuscripts, books and other objects of artistic, historical or archaeological interest; as well as scientific collections and important collections of books or archives or of reproductions of the property defined above;
> (b) buildings whose main and effective purpose is to preserve or exhibit the movable cultural property defined in sub-paragraph (a) such as museums, large libraries and depositories of archives, and refuges intended to shelter, in the event of armed conflict, the movable cultural property defined in sub-paragraph (a); (c) centers containing a large amount of cultural property as defined in sub-paragraphs (a) and (b), to be known as "centers containing monuments" (Art. 1).

The adoption of provisions for the protection of cultural heritage in the event of armed conflict initiated reflections and an international regulatory process on the subject of cultural heritage that would change with the times. In the years following the 1954 Convention, the need arose to create a further system of protection to be applied in times of peace, which took into account the new threats brought by the social and economic evolution of modern civilisation. The international community's awareness stemmed from reflections made after certain historic events: the construction of the Aswan Dam, which would have led to the destruction of the Egyptian temples of Abu Simbel, if there had been no international intervention, and the 1966 floods which caused considerable damage to the cultural heritage of Venice and Florence and saw the mobilisation of many volunteers from all over the world. These episodes brought to light the existing limitations in the conservation and protection of cultural heritage, which were based exclusively on national law, and gave a strong input to the idea of an international instrument to fill these gaps (Albanesi, 2010).

In those years, an environmental consciousness began to spread. This initiated a process of awareness-raising of what would later become a global imperative: sustainable development (Senatore, 2013). In this context, certain phenomena such as industrialisation, pollution, anthropisation and urbanisation were considered risks, and the incontrovertible relationship between cultural heritage and its surrounding environment was understood. For this reason, in 1972, the UNESCO General Conference approved in Paris the Convention Concerning the Protection of the World Cultural and Natural Heritage. This document is the first legal recognition of the strong connection between culture and nature, as it established a common regime of conservation and protection for the most important human-made productions and the extraordinary works of nature (Francioni & Lenzerini, 2008). The definitions of "cultural heritage" and "natural heritage" offered by the 1972 Convention declared that only what was of "Outstanding Universal Value" was worthy of protection.

Therefore, UNESCO attached considerable importance to the traditional categories of art history, the great monuments and the great civilisations. This concept of cultural heritage mostly included European, Christian and monumental culture (Bortolotto, 2007).

During and after the debate that led to the drafting of the 1972 Convention, non-Western countries criticised this definition, because their cultural expressions were under-represented. UNESCO therefore had to change its paradigms, making adjustments that made it possible to overcome the "almost colonialist" vision, replacing aesthetic and artistic values with anthropological ones (Bortolotto, 2007). Since the 1990s, the meaning and the definition of cultural heritage have undergone changes and reconsiderations that have broadened the concept of cultural heritage and profoundly renewed the understanding and approach to heritage, now considered an anthropological whole.

This process of change (which actually began in the late 1960s and led to the 1989 UNESCO Recommendation on the Safeguarding of Traditional Culture and Folklore, the 2001 UNESCO Universal Declaration on Cultural Diversity and the Istanbul Declaration in 2002) culminated in the UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage, approved in Paris in 2003. This Convention expanded the meaning of cultural heritage, to include intangible heritage, which is defined in Article 2:

> The "intangible cultural heritage" means the practices, representations, expressions, knowledge, skills—as well as the instruments, objects, artefacts and cultural spaces associated therewith—that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity. For the purposes of this Convention, consideration will be given solely to such intangible cultural heritage as is compatible with existing international human rights instruments, as well as with the requirements of mutual respect among communities, groups and individuals, and of sustainable development.

Previous documents conceived cultural heritage as fixed, static and monumental, while the 2003 Convention extended this concept to consider it to be a living expression to be safeguarded in its evolution (Bortolotto, 2007); the living, localised, self-reproducing character of the intangible cultural heritage is therefore accentuated (Zagato, 2008).

Apparently, the main innovation of the definition of heritage would always be the passage from the tangible to the intangible, but, in reality, the Convention introduced other very important conceptual innovations. In fact, as time goes on, cultural expressions are no longer considered objects, but processes (Bortolotto, 2007): the focus thus shifts from heritage as a document to living heritage, from documentation to transmission, from products to processes, from objects to subjects and, more importantly, from the outstanding to the representative (Cerquetti, 2015, p. 253). Moreover, the Convention focused on individuals, not only as actors who make intangible heritage visible but also as having an active role in recognising what is representative (Cerquetti, 2015).

The 2003 Convention introduced several concepts which were further developed by the subsequent Convention on the Protection and Promotion of the Diversity of Cultural Expressions, signed in Paris in 2005.

However, compared to previous documents, the focus of the 2005 Convention shifted from identity practices to activities that produce goods or objects of exchange and consumption capable of circulating and sharing cultural expressions. In fact, this was the first treaty in which explicit reference was made to the ambivalent nature of cultural—but also economic and commercial—goods, services and activities (Cunsolo, 2019).

In addition to the deep interest in commercial and economic aspects, the 2005 Convention is an important instrument that seeks to respond to the needs of society by addressing the increasing plurality that has resulted from globalisation (UNESCO, 2007).

In parallel, the Council of Europe has also proposed conventions in which the concept of cultural heritage has, over time, taken on a broader meaning. In the years following the establishment of the Council of Europe (1949), when the Old Continent was still paying the price of the conflict, an awareness was reached: culture is at the heart of all relations between people and nations, and a lack of awareness of that and other people's culture can lead to terrible consequences (Council of Europe, 2005a). Moreover, the reconstruction of cultural heritage after the Second World War had the support of a large portion of the population who, despite experiencing years of economic difficulties, retained a very strong link with their heritage (Guermandi, 2018). For these reasons, in 1954, the Council of Europe signed the European Cultural Convention in Paris. The Convention's aim of greater unity between countries was to be achieved by promoting dialogue, mutual understanding and mutual appreciation of the differences between Member States (Pavan-Woolfe, 2019). These actions would be pursued through the protection of the cultural heritage, defined for the first time as "Common European Heritage".

From an ideological point of view, the European Cultural Convention was absolutely innovative. The world was back from the exploitation of culture and cultural heritage for the aggrandisement of the nation state and totalitarian political regimes. In contrast, the 1954 Convention identified culture and cultural heritage as instruments for the enhancement of shared European values, thus overcoming the overemphasis on differences that had characterised the whole of the previous century, in favour of the commonality of the peoples of Europe (Pavan-Woolfe, 2019). The document considered free cultural expression and education in culture and cultures to be a source of enrichment for society and an antidote to nationalist regressions, with the goal of recognising common European heritage. Moreover, it encouraged a cooperation policy that would lead the Member States to "concerted action in promoting cultural activities of European interest". Starting with the 1954 Convention, various legal texts have been drawn up to foster international cooperation and preserve cultural heritage as a bearer of European identity (Pavan-Woolfe, 2019).

For this reason, in 1969, the first European Convention on the Protection of the Archaeological Heritage was opened for signature in London by Member States. The document's main purpose was to define the measures to be adopted for the protection of archaeological areas; to regulate the circulation of archaeological heritage, thus counteracting illicit trade; and, finally, to develop educational action for training and public awareness in these issues (Council of Europe, 1969). European archaeological heritage was considered a fundamental source of knowledge of civilisation, and the document asserts that, as it is the oldest resource in the history of Europe, the moral responsibility for the protection of this heritage should primarily be in the interest of the State under whose jurisdiction it falls but that it is also the concern of all European countries.

A few years later, attention shifted to architectural heritage, considered the most immediately visible part of cultural heritage and the part most affected by the devastation of war. Thus, in 1975, the Congress of Amsterdam, held at the end of the European Architectural Heritage Year, gave rise to the European Charter of Architectural Heritage. This document was very important as it emphasised the need to integrate conservation into urban planning, to preserve groups of historic buildings and their environment and to take heritage into account as part of economic and social life (Council of Europe, 1985).

This document is a charter; therefore, it only promoted general principles and recommendations, with no obligation to enact them (Smargiassi, 2012). Consequently, in 1985, the Convention for the Protection of the Architectural Heritage of Europe was signed in Granada. This treaty provided a definition for architectural heritage and restated the definition of integrated conservation introduced in the 1975 Charter. The aim of the Granada Convention was therefore to promote protection of monuments not as stand-alone objects, but rather as ones that have a relationship with their physical and social surroundings. The Council of Europe document encouraged a greater understanding between the protection of the architectural heritage and urban planning, thus establishing good practices of safeguard that were immediately considered to be a guarantee of more responsible development and improved quality of life (Pavan-Woolfe, 2019).

Following the conceptual outline of the Granada Convention, the Council of Europe thought it was necessary to update the 1969 London Convention, and, in 1992, a new European Convention for the Protection of the Archaeological Heritage was signed in Valletta. In fact, since 1969, the issues involved in protecting and promoting Europe's archaeological heritage had changed considerably, mainly because of rapid anthropisation and the consequent extensive urban planning interventions. The Valletta Convention required States that ratified to involve archaeologists in the entire planning process, thus ensuring a multidisciplinary collaboration between urban planners and regional planners (Council of Europe, 1992). The Valletta Convention is ultimately more than one simple archaeological equivalent of the Granada Convention since it represents an important step from an approach focused on objects to one focused on activity (Fojut, 2009).

In the mid-1980s, the landscape approach was widely accepted, as was the concept of integrated conservation. In 2000, the European Landscape Convention was opened for signature in Florence by the Member States of the Council of Europe. Imitating the Granada and Valletta Conventions, the Florence Treaty also introduced conceptual innovations. It went beyond the sectoral approach to the landscape as a function of an integrated and cross-cutting vision and considered the landscape as a "collective good extended to the whole territory" (Della Torre *et al.*, 2016). It also introduced the perceptual factor of the population in recognition of the landscape and encouraged the involvement of communities in landscape policies. Finally, it extended the very concept of landscape to embrace not only the outstanding but also the everyday and even degraded landscapes. The European Landscape Convention, therefore, highlighted the need for conservation of landscape heritage as an integral part and characterising element of the cultural context and also the need to create a dialogue between social reality and development and planning strategies (Pavan-Woolfe, 2019).

Following the destruction of cultural goods during the Yugoslav Wars of the 1990s, the need to implement more stringent policies for the protection of cultural heritage became more evident. The Council of Europe reflected on the new meaning that cultural heritage had assumed. It was a source of identity and differentiation in a context in which the risk of uniformity, brought by globalisation, was very real (Directorate of Culture, Cultural and Natural Heritage, 2001). It was thought that a new document should be drawn up to consider this concept of cultural heritage while taking into account the international attention on intangible heritage. In 2005, the Convention on the Value of Cultural Heritage for Society was drawn up in Faro, Portugal.

One of the most interesting innovations of the Convention is that of cultural heritage as:

> a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions. It includes all aspects of the environment resulting from the interaction between people and places through time.

The use of the word "resources" radically changed the concept of cultural heritage, which had previously been defined as "assets". The Faro Convention clarifies that cultural heritage is not static, unchanged, but it exists to be used and, in parallel, recognises that it can bring benefits (Fairclough, 2009). Furthermore, the new definition particularly focuses on the interactive nature of cultural heritage, recognising that it is defined, and redefined, by human actions, which is why it cannot be seen as static and immutable (Council of Europe, 2005b). In fact, another fundamental word is "people" because it introduces a collective profile into the notion of cultural heritage (Carmosino, 2013), indicating that it is a collective and shared phenomenon (Pinton, 2019).

This Convention supports the potential of cultural heritage as a resource with multidimensional value, which can be used for sustainable development and for improving quality of life (Montella & Petraroia, 2016).To achieve these principles, it is necessary to involve all actors as part of a process of democratic governance and shared responsibility.

This step is fundamental, as it establishes the overcoming of a static vision of cultural heritage, bringing attention to its use value. In a nutshell, heritage exists to be used, and the Faro Convention concurrently recognises that it can bring benefits.

2. Research questions

The preset research project has been developed on the basis of the above-mentioned reflections on the evolution of the concept of cultural heritage.

As previously stated, this concept has undergone significant changes over time, and the 2005 Faro Convention was a pivotal moment in this process. Indeed, this document emphasised the dynamic and interactive nature of cultural heritage, considering it as a resource. This shift from a static view to a focus on the use-value of cultural heritage not only has impacts at a conceptual level but also has relevant practical implications for several sectors, including the business world. Thus, the Faro Convention's innovative definition of cultural heritage suggests that both local cultural heritage and corporate heritage, both tangible and intangible, including values, knowledge and traditions, can become a resource for a company's competitive positioning in the glocal context.

By adopting the model developed by Montella (2009), we can therefore affirm that cultural heritage has a multidimensional value, in which the value of production is added to the value of presentation and the value of landscape. The first refers to the value that the cultural heritage is able to create for external stakeholders. It explicitly refers to commercial uses and the profits that can derive from it for companies in various sectors, from cultural industries to others in apparently more distant industries, such as manufacturing. In fact, as also highlighted by the Country Brand Index (Future Brand, 2014-2015), the Italian cultural heritage is one of the factors that positively influence the perception of "Italy" as a brand worldwide. It is, therefore, now a shared fact that the cultural heritage image is able to condition the perceptions and attitudes of consumers towards Made-in products. The Country Brand Image is, in turn, able to influence the effect produced on consumers by the Country of Origin. It follows that companies can enrich their offer with the symbolic values that come from the Made in Italy brand (Conti & Pencarelli, 2016).

In this context, it should be specified that corporate heritage does not stem exclusively from corporate history, but benefits from the relationship with its context (milieu), and this is especially true for Made in Italy companies (Montella & Silvestrelli, 2020). Indeed, the company is an expression of the milieu, because the cultural heritage present in the production place enhances the intellectual capital and the reliability of firm-specific values. The place-specific heritage and the genius loci can therefore be a productive factor, as they are able to qualify the outputs (Macario & Santovito, 2016). One of the sectors for which this is most true is the Agrifood (Donia *et al.*, 2020).

This relationship is not one-sided. In addition to being resources for companies, cultural heritage and place can also receive benefits from the company. The enhancement of the local cultural heritage and milieu by the company can be mutually beneficial. Products may acquire symbolic value from cultural heritage, providing benefits not only for preserving and enhancing cultural heritage and the milieu, but also for promoting the sustainable development of the territory.

Therefore, in the business context, cultural heritage associated with its place of production becomes a key element that enhances intellectual capital and contributes to the competitive positioning of companies. This phenomenon is particularly evident in the agri-food sector, where the provenance and history of a product can positively influence consumer perception. Viewing cultural heritage as a living resource with a multidimensional value not only promotes sustainable development but also improves the quality of life as it connects people to their cultural roots.

In conclusion, recognising cultural heritage as a dynamic and evolving force opens up new perspectives and opportunities. This innovative perspective not only transforms the perception of cultural heritage but also offers companies the possibility to fully exploit cultural heritage in their production processes and communication strategies. In an increasingly competitive glocal context, cultural heritage and milieu thus emerge as crucial elements to achieve a distinctive competitive advantage.

Taking into account these premises and the gaps in the literature on heritage marketing (see Chapter 1), this thesis aims to examine the relationship between the company, its heritage, the local cultural heritage and the milieu. It is expected that these relationships are positive and that the enhancement of the local cultural heritage and the milieu by the company can be beneficial for the company and its territory.

Based on these assumptions, this thesis aims to answer the following research questions:

RQ1: What role can corporate heritage, local cultural heritage and milieu play in heritage marketing strategies?

RQ2: How do heritage marketing strategies affect local cultural heritage and the milieu and contribute to local sustainable development?

To answer these research questions, this thesis focuses on the wine sector, considering its particular relationship with culture and territory. The analysis discusses some case studies, with particular attention to the Marche region, Italy. The research investigates the marketing strategies implemented by wine companies and the link with cultural heritage and their milieu, as well as the possible impact of their activity on the promotion of sustainable local development.

Fig. 1 shows the conceptual framework of the research.

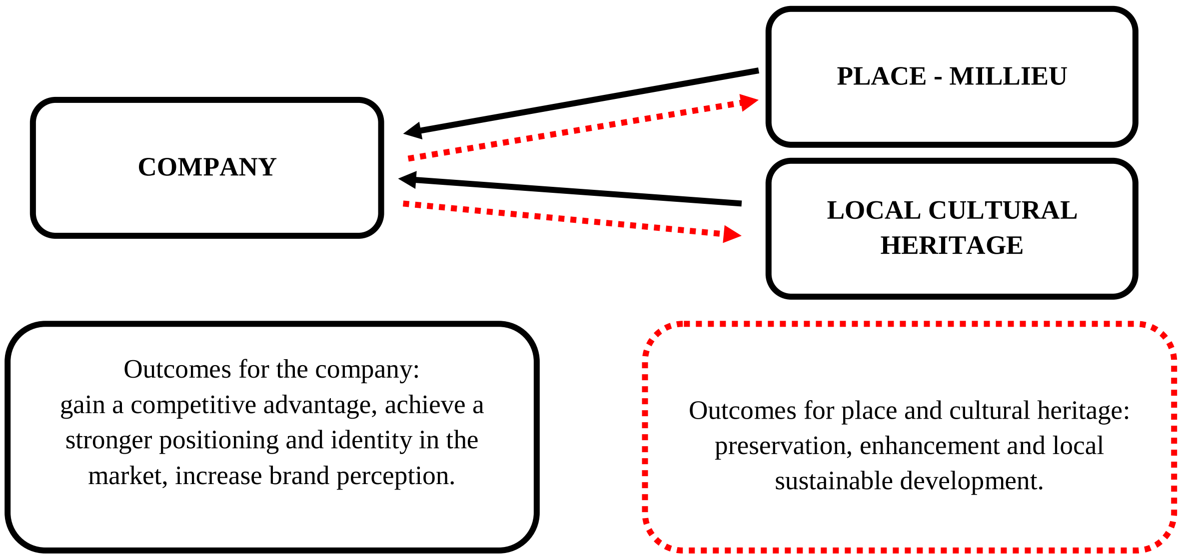

Fig. 1 – Conceptual framework of the research (source: own elaboration)

3. Outline of the research

This thesis aims to deepen the understanding of the dynamics between a company, its heritage, the local cultural heritage and the milieu. In order to pursue this objective, the work begins with a critical analysis of the literature on heritage marketing in order to outline the conceptual and theoretical framework that guides the research (Chapter 1). Subsequently, in order to answer the research questions, the thesis presents different connected studies: the first proposes a best practice useful for a benchmarking analysis (Chapter 2), the following two chapters focus on the case study of the Marche region (Chapters 3 and 4), the last one is dedicated to exploring the above-mentioned relationship in order to understand its impact on consumers (Chapter 5). Fig. 2 shows the outline of the research.

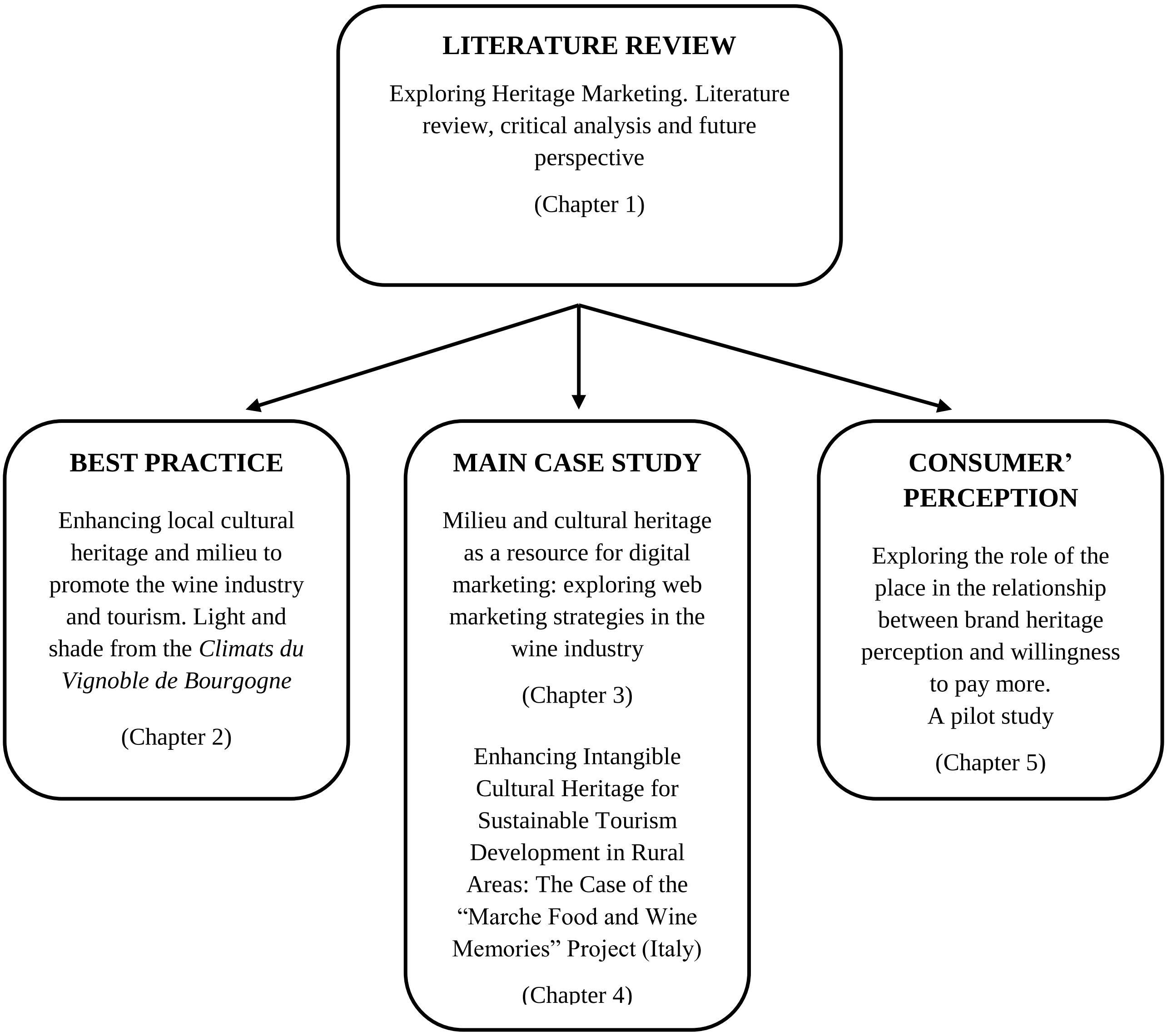

Fig. 2 – Outline of the research (source: own elaboration)

The first chapter presents a narrative review of the literature on heritage marketing. Heritage marketing has been an area of academic interest since the early 2000s. This critical literature review provides an in-depth assessment of current knowledge and identifies three distinct strands of research: key concepts, heritage marketing tools and consumer perceptions. While the existing literature places a strong emphasis on internal heritage resources, there is a significant gap in exploring the potential of external resources, particularly local cultural heritage. In addition, the time dimension is analysed in depth, while the under-explored impact of place on heritage marketing is neglected. Based on the identification of these gaps, three research proposals are made: RP1 suggests to explore the role of external heritage resources, RP2 suggests to deepen the role of the place dimension and RP3 suggests to investigate how heritage marketing strategies impact on the surrounding territory.

The second chapter presents the case of the Burgundy region (France) as a good practice for benchmarking analysis. In the wine sector, the relationship between a company, its milieu and the local cultural heritage is crucial for achieving a sustainable competitive advantage. Two of the key ingredients for the success of a wine destination are terroir – a combination of factors, including soil, climate, and sunlight, which give wine grapes their distinctive character – and landscape. This chapter aims to contribute to the debate on this issue by examining the relationship between the wine sector, milieu and cultural heritage, to understand the role it plays in wine and tourism marketing, a field that scholars have not yet adequately explored. It analyses the case of Burgundy, where the *Climats du Vignoble de Bourgogne* were inscribed on the UNESCO World Heritage List in 2015. The results show that the enhancement of this relationship could create value, not only for the wine sector (strengthening brand image), but also for cultural heritage (by improving its protection and enhancement) and, despite some identified shades, for the territory (mainly through tourism development).

The following two chapters then focus on the main case study: the Marche Region (Italy).

In particular, the third chapter focuses on the role of the milieu and cultural heritage in digital marketing. In the current globalised world, the milieu can be a competitive advantage for companies rooted in their local production context, as is the case for the agri-food industry (Riviezzo *et al.*, 2016; Sgroi *et al.*, 2020). Effectively exploiting the relationship between a company, its environment and local cultural heritage can be a successful marketing strategy that can trigger a virtuous circle that benefits sustainable tourism development (Askegaard & Kjeldgaard, 2008; Napolitano & De Nisco, 2017). One fundamental tool for exploiting this potential is digital marketing (Marzo-Navarro & Pedraja Iglesias, 2021). In this context, the chapter investigates whether and how the Marche wine industry communicates its relations with the milieu and cultural heritage on official websites. A model has been developed to analyse the web marketing strategies adopted by 83 wineries belonging to a non-profit association whose main objective is the promotion of wine tourism. Starting with the gaps identified in the scientific literature on the subject, the analysis of the content dimension included information on the company and local heritage, branding and services and partnerships. The results show that the relationship between milieu and cultural heritage is not significantly communicated on the website, revealing much room for improvement. The evaluation model and management implications could be applied to all companies in the agri-food sector and, more generally, in the Made-in sector.

The fourth chapter analyses a case study of particular interest from the Marche region (Italy). In the context of increasing interest in the contribution made by culture to the implementation of the goals and targets of the 2030 Agenda for Sustainable Development, this chapter investigates how intangible cultural heritage (ICH) can help sustainable tourism in rural areas. Adopting a case study methodology, I analysed the “Marche Food and Wine Memories” project, an initiative promoted by CiùCiù, a winery based in Offida, a small village in the Marche region (Italy). After discussing the strategies and tools adopted to enhance rural heritage, the analysis focuses on the involvement of local communities and businesses in the different phases of the process. The research aimed to understand: (1) the project’s current contribution to the economic, social, cultural and environmental dimensions of sustainability; and (2) its strengths and weaknesses and possible future improvements. The research findings confirm the high potentialities of ICH-based initiatives for sustainable tourism development in rural areas, but also reveal the need to improve the level of networking with local businesses and highlight gaps in marketing and management skills. Finally, the results provide policy and managerial implications for similar ICH-based initiatives.

The third part aims to investigate the role of a place rich in cultural heritage in heritage marketing strategies, with a particular focus on the consumer’s perception. Therefore, this chapter aims to deepen the understanding of the potential role that a place rich in cultural heritage can play for a company operating there. The central question guiding the research concerns the contribution of place and heritage in heritage marketing strategies. This pilot study uses a quantitative methodology to examine the relationship between brand heritage and willingness to pay more, taking into account the moderating effects of a place rich in heritage. The results confirm a positive and significant effect of brand heritage perceptions on willingness to pay more, consistent with previous research. However, the moderating role of the place variable was not found to be significant, suggesting that the relationship between brand heritage and willingness to pay more is robust and stable regardless of the specific context examined. Managerial implications include the potential for investment in heritage marketing strategies to positively influence consumers' willingness to pay more. Despite the non-significant moderating effect of place, leveraging a place rich in heritage can still provide a competitive advantage.

In terms of methodology, both quantitative and qualitative methods were employed across the various chapters to provide a nuanced exploration of the research questions.

Chapter 1 adopts the narrative literature review methodology. It provides an overview and analysis of existing research, a gap analysis and research propositions.

In Chapter 2, a qualitative approach was applied, utilising an exploratory case study methodology following Yin's framework (Yin, 2002; 2018). This involved a six-month field research period in the Dijon area, blending desk analysis with observational surveys, and conducting semi-structured interviews with key actors.

Chapter 3 introduced a model designed to analyse web marketing strategies adopted by wineries. The analysis focused on corporate websites and integrated existing models to encompass communication regarding the relationship between the company, its milieu and cultural heritage. The methodology seamlessly combined quantitative measurements, employing binary and scale techniques, with qualitative insights derived from a detailed analysis and interpretation of textual and multimedia content.

Moving to Chapter 4, a qualitative methodology was embraced, utilising diverse materials and methods for the analysis of a selected case study. Primary data encompassed project-related materials, visual data, semi-structured interviews, and participatory observations during gamified tours. Additionally, secondary data from regional statistics enriched the exploration.

In Chapter 5, a quantitative methodology was implemented to test hypotheses related to brand heritage perception and willingness to pay more, considering the moderating role of a place rich in cultural heritage. Statistical analyses were conducted using SPSS (version 29.0.2.0) and Hayes' PROCESS macro (version 4.3).

4. Notes for the reader

This thesis is the result of a three-year experience in the PhD course Global Studies, Justice, Rights, Politics at the Department of Political Science, Communication and International Relations of the University of Macerata (UniMC). It was developed within the framework of an Industrial PhD (*dottorato innovativo*) financed by the Regional Operational Programme (ROP) of the Marche Region with a thematic scholarship. The research was based on the topic: Corporate and local cultural heritage as a marketing lever for Made in Italy companies. The Industrial PhD required to spend 8-12 months in different companies, part of which in a company of the Agrifood Marche

Food Farming Innovation Cluster[1], for research and development purposes, and 12 months abroad. In this specific case, the companies involved in the PhD programme were i-strategies, a start-up company based in the province of Ascoli Piceno (Italy) with expertise in digital storytelling, heritage marketing and creative tourism, and Azienda Agraria Guerrieri, a family wine, olive and olive oil company based in the province of Pesaro-Urbino (Italy), member of the Agrifood Marche Food Farming Innovation Cluster. In terms of international mobility, a six-month stay was spent at the Burgundy School of Business (BSB) in Dijon (France), where courses in cultural management and wine management are offered. The BSB also hosts the Research Laboratory (CEREN), which focuses on areas such as wine, experimental economics, finance and arts and culture management. The other 6 months were spent at the Toulouse Business School (TBS) in Barcelona (Spain), which offers courses in management, marketing and tourism.

This PhD thesis is a collection of papers that were produced as part of the research project described above. Some of these contributions have been presented at international scientific conferences and published in academic journals or books.

The reflection on the evolution of cultural heritage presented in this introduction is a revised version of an extract from the chapter entitled “Towards Sustainable Innovation in Tourism: The Role of Cultural Heritage and Heritage Communities” in the book “Cultural Leadership in Transition Tourism: Developing Innovative and Sustainable Models” edited by Elena Borin, Mara Cerquetti, Marta Crispí and Judith Urbano. This particular chapter was co-authored with my academic supervisor, Professor Mara Cerquetti. Specifically, the discourse on the evolution of cultural heritage is a product of my own contribution. The publication is the following: Cerquetti, M., & Romagnoli, A. (2022). *Toward Sustainable Innovation in Tourism: The Role of Cultural Heritage and Heritage Communities*. In E. Borin, M. Cerquetti, M. Crispi & J. Urbano (Eds.), *Cultural Leadership in Transition Tourism Developing Innovative and Sustainable Models* (pp. 33–50). Springer.

The research presented in chapter 2 was presented at the International Workshop “Rethinking Culture and Creativity”(University of Catania, University of Florence, University of Campania “Luigi Vanvitelli” and University of Macerata, 10-11 November 2022). At the time of writing, a revised version of the chapter has been accepted for publication on *Il capital culturale. Studies on the Value of Cultural Heritage* scientific journal. The article was written with my academic supervisors, Professor Mara Cerquetti and Professor Tonino Pencarelli. The research was carried out during the research period abroad at the Burgundy School of Business in Dijon.

A revised version of chapter 3 has been presented to the 5th Conference on Food and Wine Tourism (Heilbronn University of Applied Sciences and Baden-Wuerttemberg Cooperative State University (DHBW) Heilbronn 5-7 October 2022) and has been published by *Corporate Governance and Organizational Behavior Review*. The publication is the following: Cerquetti, M., & Romagnoli, A. (2023). Milieu and cultural heritage as a resource for digital marketing: Exploring web marketing strategies in the wine industry [Special issue]. *Corporate Governance and Organizational Behavior Review*, *7*(3), 347–364. https://doi.org/10.22495/cgobrv7i3sip10.

A revised version of chapter 4 was presented to the e 5th Conference on Food and Wine Tourism (Heilbronn University of Applied Sciences and Baden-Wuerttemberg Cooperative State University (DHBW) Heilbronn 5-7 October 2022) and was then published in a special issue of *Sustainability*. The article was written with my academic supervisors, Professor Mara Cerquetti,

[1] Official website of Agrifood Marche Food Farming Innovation Cluster: https://www.agrifoodmarche.it/it

with my corporate supervisor Gianluca Vagnarelli and the researcher Concetta Ferrara. The research was carried out during my research period at the start-up i-strategies.The publication is the following: Cerquetti, M., Ferrara, C., Romagnoli, A., & Vagnarelli, G. (2022) Enhancing Intangible Cultural Heritage for Sustainable Tourism Development in Rural Areas: The Case of the "Marche Food and Wine Memories" Project (Italy). *Sustainability, 14*, 16893. https://doi.org/10.3390/su142416893.

1. Exploring Heritage Marketing.
Literature review, critical analysis and future perspectives

1.1 Introduction

Heritage marketing is a marketing strategy that leverages corporate heritage. It is a relatively new topic in academia, but one that is gaining increasing interest from various disciplines. The study of this topic began in the early 2000s and has since become the subject of a considerable body of literature. This chapter aims to explore the main scientific literature on the subject, highlighting the key contributions that outlined the path of research development in the field of corporate heritage. Additionally, by critically analysing the current literature, the objective is to identify any gaps and potential research opportunities in the field of corporate heritage.

The review is structured in two parts: the first part describes the existing literature, while the second part discusses the current state of affairs and the main gaps in the literature.

In the first part, the study of literature identified three strands of research. The first strand, which is considered the foundation of literature on the theme, originates from the contributions of Balmer, Greyser, and Urde. Their contribution introduces key concepts and demonstrates how the interest in corporate heritage has primarily concerned the fields of corporate marketing and corporate identity. It then moves to managerial aspects, particularly to stewardship by managers. The text stresses the importance of managers' awareness and responsibility towards corporate heritage within organisations. This strand forms the basis of the literature on heritage marketing, from which the other two strands identified also originate. The second strand of research identified focuses on heritage marketing tools, moving from an initial focus on specific tools, in particular the corporate museum, to a broader assessment of the strategic and managerial implications. The subsequent systematic approach to heritage marketing tools allows for a clear and functional categorisation, which guides the implementation of heritage marketing strategies. Scholars emphasise the importance of a transversal strategic vision, highlighting the need for conscious investment in historical and cultural heritage as a strategic resource. The third and final strand analyses consumer perceptions of the heritage brand and its implications. The critical role of consumers in shaping corporate image is revealed. Different measurement scales are developed to evaluate consumer perceptions, contributing to a more nuanced understanding of this complex relationship.

The second part discusses the existing literature, leading to new research propositions. In particular, the prevailing emphasis on internal heritage resources leaves room for further exploration of the potential of external heritage resources, especially of the local cultural heritage. Furthermore, while the temporal dimension has been extensively studied, the impact of place on the implementation and perception of the corporate heritage has remained largely unexplored.

In conclusion, this overview of the three strands of research provides a solid starting point for understanding corporate heritage and its impact on the current business sector. However, it also invites further exploration to fill the identified gaps and deepen the understanding of the crucial role of corporate heritage –heritage more broadly –and the place dimension in current marketing and corporate identity dynamics.

1.2 The different strands of literature: key concepts, tools and consumer perception

1.2.1 Heritage marketing: founding concepts

The first strand of research originated with the academic contributions of Balmer, Greyser and Urde, introducing some fundamental concepts that formed the foundation of the literature on heritage marketing, summarised in Tab. 1.

CONCEPT	DEFINITION	SOURCE
Corporate heritage brand	A corporate heritage brand pertains to organisations that emphasise their institution's heritage as a crucial component of their corporate brand identity.	*Urde et. 2007*
Corporate brand with a heritage	A corporate brand with a heritage refers to companies that have chosen not to formally incorporate the organisation'sheritage.	*Urde et. 2007*
Corporate heritage identity	«Corporate heritage identity refers to those institutional traits which have remained meaningful and invariant over the passage of time and, as such, a corporate heritage identity viewed as being part of the past, present and future».	*Balmer 2011a* (p. 1345)
Relative invariance	Relative invariance is a phenomenon observed in heritage identities, wherein specific attributes demonstrate a level of persistence or continuity across time. Although these attributes remain unaltered, the interpretations or meanings linked to them may experience shifts or alterations.	*Balmer 2011a*
Omni-temporality	Omni-temporality, within the context of corporate heritage identities, refers to the idea that entities exist across various temporal strata or multiple time frames. The concept suggests that corporate heritage institutions endure over time, retaining meaningful traits. It involves a tripartite temporal dynamic, meaningful to the past, present, and future.	*Balmer 2013*
Corporate heritage marketing	«Corporate heritage marketing is an organisational-wide philosophy which in underpinned by a multi-generational focussed, customer, stakeholder, societal and CSR/ethical focussed ethos. It is enacted and created over successive generations and should broadly meet a tri-generational criterion».	*Balmer 2013* (p. 315)
Total corporate heritage communication	Total Corporate Heritage Communication is based on Total Corporate Communication and emphasises corporate heritage identities and brands, taking into account omni-temporal and multi-generational dimensions. It involves linking corporate identity/heritage brand, communicating heritage experience, shaping image and reputation. It includes primary, secondary, tertiary and legacy communication, internally and externally, addressing of coordinating communications across time and generations, but remaining crucial for corporate heritage entities.	*Balmer 2013*
Corporate heritage identity stewardship theory	The Corporate Heritage Identity Stewardship Theory posits that the strategic implementation of a corporate heritage identity relies on a specific management mindset, which is significantly influenced by three awareness dimensions articulated by managers (i.e., awareness of positionality, heritage, and custodianship). These awareness dimensions are supported by six managerial stewardship dispositions characterised by a sense of: continuance, belongingness, self, heritage, responsibility and potency.	*Burghausen, Balmer 2015*
Organisational heritage identity	«The perceived and reminisced omni-temporal traits - both formal/normative and utilitarian/societial – of the	*Balmer, Burghausen 2015a* (p. 403)

	organisational members' work organisation».	
Organisational heritage identification	«Organisational members' identification/selfcategorisation vis-à-vis the perceived and reminisced omni-temporal traits – both formal/normative and utilitarian/societal – of their work organisation».	*Balmer, Burghausen 2015a* (p. 403)
Organisational heritage cultural identification	«Organisational members' multigenerational identification/selfcategorisation with the perceived and reminisced omni-temporal traits – both formal/normative and utilitarian/societal – of their work organisation's corporate culture».	*Balmer, Burghausen 2015a* (p. 403)

Tab. 1 – Main heritage marketing concepts (source: own elaboration).

An initial work (Balmer *et al.*, 2006) conducted an analysis of monarchies, which the authors viewed as entities with attributes similar to those of corporate brands. This research introduces the concept of "corporate heritage brand". Building on previous research on monarchies (Balmer, 2004; 2008), Balmer developed a five-part model. The model identifies the "5Rs" of monarchies as a distinctive characteristic of corporate heritage brands, represented by the "regal", "royal", "relevant", "responsive" and "respected" dimensions. These five criteria can be interpreted as a precursor of subsequent conceptual models. In effect, these criteria are translated into five principles for effectively managing corporate heritage brands: 1) Requisite corporate heritage identity; 2) Relevant corporate heritage brand; 3) Respective corporate heritage brand; 4) Responsive corporate heritage brand; 5) Reliable corporate heritage brand. Therefore, managers dealing with the corporate heritage brand need to focus on corporate identity (the "royal" characteristic of monarchies) and behaviour and symbolism (the "regal" characteristic). The overall aim is to ensure that the corporate heritage brand remains relevant, respective and responsive to stakeholder concerns (Balmer, 2013).

Based on these premises, Urde *et al.* (2007) outlined the concept of corporate heritage brand as a fundamental dimension of corporate identity. This can be identified through five distinctive elements known as the "Heritage Quotient", consisting of the following elements: track record, longevity, core values, use of symbols, and the belief that history plays a crucial role in corporate identity (see Fig. 3). The authors argue that brands play a fundamental role in expressing a company's overall purpose and values. They suggest that a brand's past is important not only for current activities but also for future ones, and that the organisation should use its heritage comprehensively to influence all its activities. From this perspective, history is seen as a dynamic element that is constantly changing. The organisation adopts a proactive approach to management, deliberately utilising the value of its past to guide its brand strategies, positioning, and activities. However, the authorsargue that a corporate heritage does not always contribute to defining its brand identity or becoming a tangible source of competitive advantage. Indeed, they distinguish between a corporate heritage brand and a corporate brand with a heritage, stating that «a brand with a heritage may become a heritage brand. We view this essentially as a strategic decision» (Urde *et al.*, 2007, p. 11).

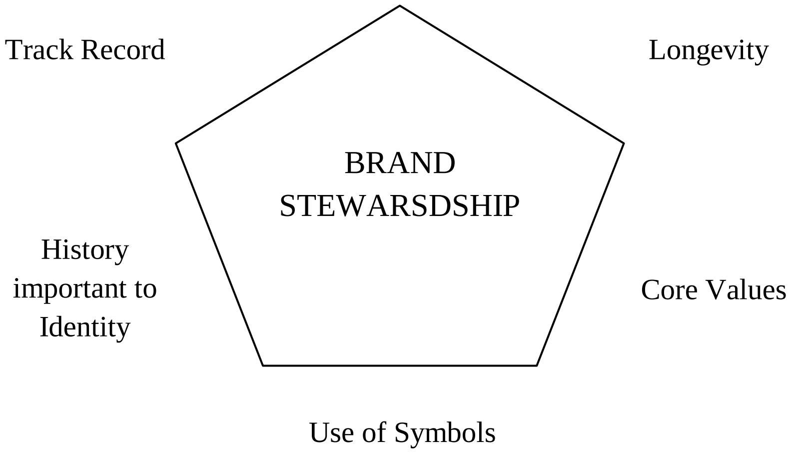

Fig. 3 – Heritage Quotient (source: Urde *et al.*, 2007)

These papers have aroused significant interest that led to increased research activity by scholars such as Blombäck and Brunninge (2009; 2013.), Foster *et al.*, (2011), Hakala *et al.*, (2011), Hudson (2011), Wiedmann *et al*., (2011a; 2011b), Hudson and Balmer (2013), and Burghausen and Balmer (2014a; 2014b; 2015). This research strand represents a new area of investigation in the heritage field, mainly developed in the academic discipline of business marketing.

Afterwards, Balmer (2011a) recognised that heritage institutions have enduring identity characteristics, and therefore, introduced the notion of "corporate heritage identity". This represents a shift from previous studies that examined corporate heritage through a branding approach. Balmer suggested adopting an explicit corporate identity perspective to explore it more in depth. This research suggests that organisations develop a unique institutional identity, referred to as a corporate heritage footprint (Balmer, 2011 b). Thus, corporate heritage becomes a central dimension of the corporate identity of such organisations and can be used as a strategic resource for corporate identity in general, and corporate heritage identity in particular (Balmer, 2013).

The introduction of corporate heritage identity prompts further reflection, particularly on its nature. Balmer first introduced the concept of "relative invariance". This concept assumes a crucial role because, although heritage organisations may appear unchanging, they may, in fact, be subject to change. Therefore, corporate heritage identities and brands become a dynamic fusion of identity continuity and change over time, encompassing the past, present, and future.

Linked to this is the phenomenon of "Institutional Role Identities". These identities constitute a diverse set, linked to various institutions, places, cultures, and time periods. From a historical perspective, heritage identities could acquire new meanings and relevance over time. Balmer highlights the importance of the two-way trust between the company and its stakeholders as a key aspect of corporate heritage identity. Authenticity on the part of the corporate heritage institution and affinity on the part of consumers and other interest groups are essential elements for consolidating this identity (Balmer, 2011a).

Exploring the topic of corporate heritage identities more in depth, Balmer(2013)identifies the six fundamental criteria of heritage identity:

1. Omni-temporality: as already argued in previous works (Balmer, 2011a; Balmer, 2011b; Balmer, 2011c), a corporate heritage interacts with all three time frames: past, present and prospective future. For this reason, it is recognised as one of the fundamental criteria of corporate heritage.
2. Institution trait constancy: it requires the persistence of relevant and constant corporate identities over time. Corporate heritage is based on distinctive features identified in 11 key elements (ownership, organisational type, organisational rationale/culture and ethos, product and service focus, production processes and service delivery, quality levels, location, group and class associations, design and style, sensory use, corporate communications). Balmer argues that it is possible that some organisations may not be aware of their heritage, but it is important to recognise it because the characteristics of the heritage may vary and be interpreted differently by individuals and groups.
3. External/internal tri-generational hereditary: it implies the persistence of the corporate identity over at least three generations. A minimum duration of 50 years is proposed as a requirement for the fundamental identity characteristics, outlining the assumption that if these characteristics persist, the concept of corporate heritage can be validly applied. This legacy can affect both internal aspects such as ownership and employment, and external aspects in the context of customer, supplier and shareholder relationships.
4. Augmented role identities: as argued in a previous paper (Balmer, 2011a), this criterion implies that the corporate identity is intrinsically intertwined with multiple role identities. The corporate heritage institutions invested with such multiple identities take on an emblematic character in time and space, acting as representative symbols for groups, societies and places. This multi-dimensionality of identity, which includes temporal, territorial, cultural, social and familial ones, contributes to the uniqueness of corporate heritage institutions. The additional role of identity in corporate heritage institutions should ideally meet the requirement of three generations before being recognised as significant.
5. Ceaseless multigenerational stakeholder utility: it implies that the identity of a corporate heritage demonstrates continuity and relevance to successive generations of stakeholders. This criterion emphasises the need for corporate heritage institutions to continually adapt to the needs of successive generations, maintaining awareness of generational affinities and preserving the authenticity of the corporate heritage. Attention to these tripartite dimensions can foster bilateral and intergenerational trust between institutions and stakeholders, contributing to durability and relevance over time.
6. Unremitting management tenacity: it indicates that the identity of the corporate heritage is underpinned by continuous and careful management of the heritage itself. This concept emphasises the importance of active management to ensure the survival and relevance of corporate heritage. The strategy and protection of corporate heritage are seen as fundamental to the success and preservation of the character and value of a company over time.

In the same paper, Balmer (2013) introduces and explains two fundamental concepts: corporate heritage marketing and total corporate heritage communication.

Based on the definition of corporate marketing (Balmer 2011c), Balmer (2013, pp. 315) defines corporate heritage marketing as «an organisational-wide philosophy which is underpinned by a multi-generational focussed, customer, stakeholder, societal and CSR/ethical focussed ethos. It is enacted and created over successive generations and should broadly meet a tri-generational criterion». The corporate heritage marketing doctrine aims to balance the continuity of the corporate heritage with the need for change. Corporate heritage institutions, once established, provide distinctive and enduring platforms for multilateral relationships with organisations and stakeholders/businesses. The logic of corporate heritage marketing is concerned with meeting the needs of future generations, taking into account the origin, inheritance and future of the institution. Many corporate heritage organisations recognise that developing strong, distinctive, and enduring corporate heritage brands is not only desirable but may also be a crucial imperative for creating lasting value for shareholders and stakeholders.

The other concept introduced by Balmer is total corporate heritage communication. Starting from previous work on total corporate communication (Balmer 1995; Balmer 1998; Blamer & Gray 1999), the author focuses on corporate heritage identities and brands, giving importance to the omni-temporal and multi-generational dimensions of corporate heritage. Total corporate heritage communication concerns the link between the corporate heritage identity and the heritage brand, providing experience and knowledge of the corporate heritage and significantly shaping image and reputation. The impact is reflected in multi-generational relationships with customers and other stakeholders. Despite the challenges of coordinating all communications, especially over time and across generations, it is crucial for corporate heritage entities. Total corporate heritage marketing communications includes primary, secondary, tertiary and legacy corporate heritage communications, both internal and external. Primary communication concerns the omni-temporal effects of actions related to products, services, management and employees. Secondary communication involves more controlled channels such as advertising, public relations and sponsorship. Tertiary communication involves interactions generated by third parties such as stakeholders, competitors and the media. Legacy communication is multi-generational and omni-temporal, transmitted across generations, recognising that corporate heritage can be inherited over time. This legacy can be internal, between management groups or families in family businesses, and external, involving customers and other stakeholders.

Based on these studies, research has focused on the development of some key concepts, with particular attention to omni-temporality and relative invariance. These concepts are interconnected, as omni-temporality describes the active work of managers, while relative invariance characterises the perception of such efforts (Mir Bernal *et al.,* 2023). As already argued, the concept of omni-temporality, introduced by Balmer (2013) as a fundamental criterion of corporate identity, focuses on the coexistence of corporate identities in the past, present and future (Hudson & Balmer, 2013). This perspective requires managers to develop an awareness of their responsibility for stewardship (Burghausen & Balmer, 2015). In fact, it has been done also a study that examined how the concept of omni-temporality and the development of a corporate heritage brand, opened the way to a meritocratic vision of the corporate heritage as a status that can be achieved through the managerial work (Mir Bernal *et al.*, 2023).Instead, relative invariance is that phenomenon that allows corporate heritage brands to maintain their essence despite transformations (Balmer, 2011a). Corporate heritage brands maintain their fundamental attributes while the meaning associated with them evolves, generating tensions that require a careful balance in the integration and comparison of meanings to meet the needs of different stakeholders (Balmer, 2011a; Lee & Davis, 2021).Despite their diversity, omni-temporality and relative invariance are often considered related in the literature (Balmer, 2013; Balmer & Burghausen 2015b; Santos *et al.*, 2016). These concepts reflect the uniqueness of the corporate heritage brand category, which combines the retrospective and prospective link with the present (Balmer, 2011a; Burghausen & Balmer, 2014b; Hudson & Balmer, 2013), merging past, present and future in the construction and communication of the brand.

Delving deeper into the analysis of corporate heritage identity, Burghausen and Balmer (2014a) explored the nature and importance of corporate heritage identity through a case study. They focused on managerial aspects, on how managers interpret and internalise corporate heritage identity within the overall management of corporate identity. The research identifies two main categories of managerial responsibility for corporate heritage identity, corporate heritage management activities and corporate heritage implementation strategies. A specific implementation model of corporate heritage management activities is proposed, guided by four actions: validating, articulating, relating and adopting. Similarly, corporate heritage identity implementation strategies are outlined by four fundamental pillars: narrating, visualising, performing and embodying (see Fig. 4).

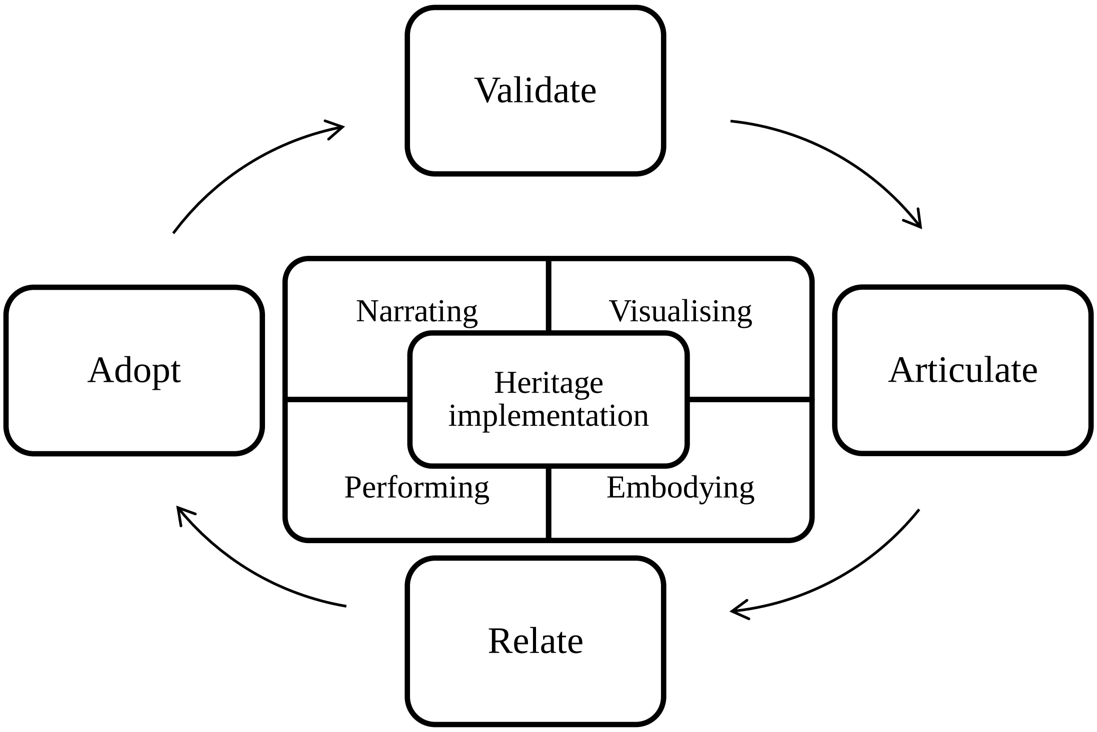

Fig. 4 – Implementation Framework of Corporate Heritage Identity Management (source: Burghausen & Balmer, 2014a)

In their follow-up study, Burghausen and Balmer (2015) presented the theory of "corporate heritage identity stewardship" and delved into managers' understanding of the concept of corporate heritage within their organisations and its strategic management. The authors highlighted the importance of managers' awareness of corporate heritage, in the context of corporate heritage stewardship, as a key factor in the management of corporate identity and heritage orientation in heritage-oriented organisations. The authors proposed a theoretical framework named Corporate Heritage Identity Stewardship (CHIS) to outline the activities related to corporate heritage identity management in heritage-oriented companies. They also identified three dimensions of managerial awareness: positionality awareness, which relates to how the company is perceived temporally, spatially and socio-culturally in the minds of managers; custodianship awareness, which focuses on the sense of responsibility and ability to manage the corporate identity legacy; and heritage awareness, which focuses on the manager's sense of heritage (see Fig. 5).

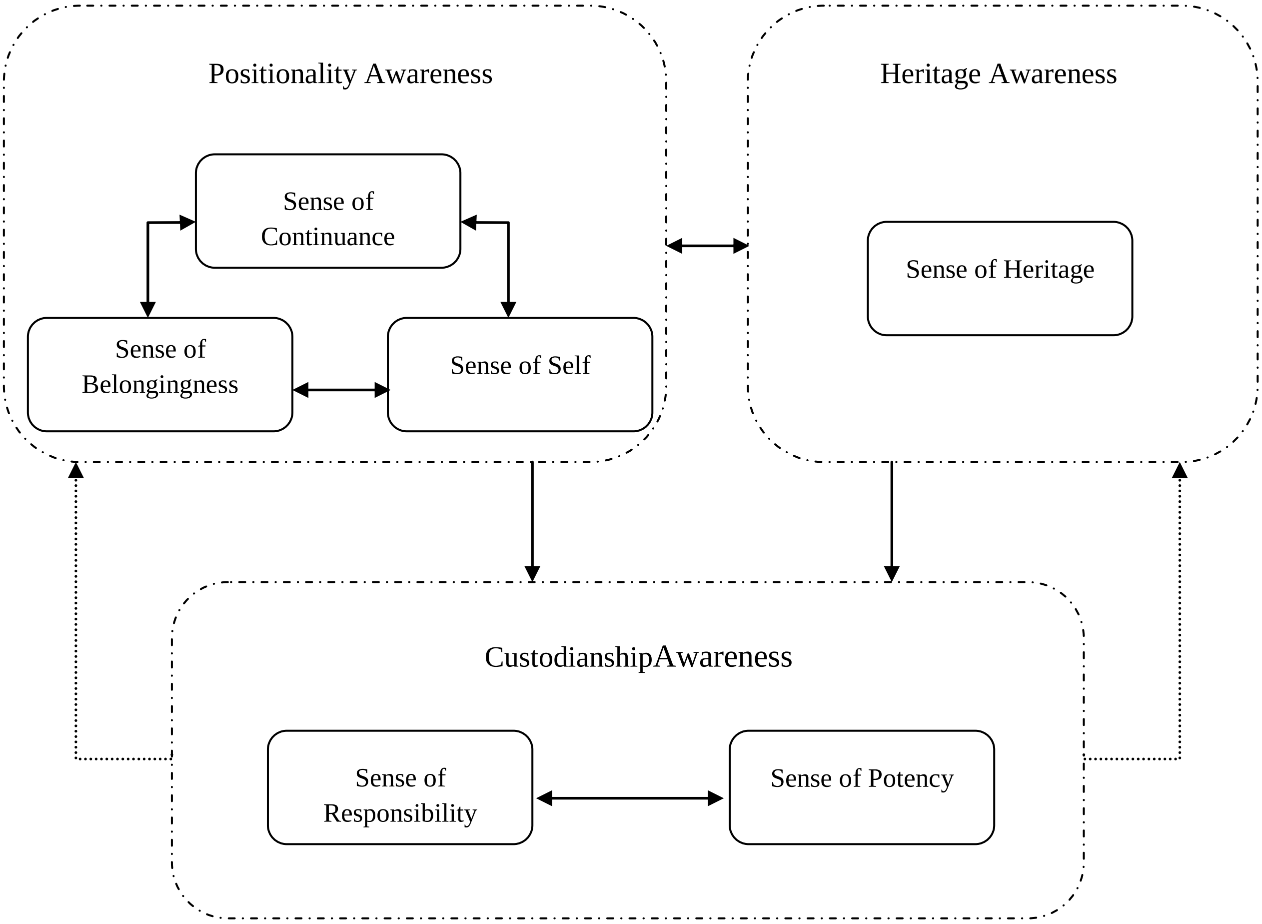

Fig. 5 – The Corporate Heritage Identity Stewardship (CHIS) theory (source: Burghausen & Balmer, 2015)

In the context of the study of corporate heritage, another concept is then introduced, that of "organisational heritage". This idea was formally introduced by Balmer and Chen (2016), who distinguished between "organisational heritage" and "organisational heritage identification". Organisational heritage refers to the collection of culture, values, traditions, knowledge and practices that make up the historical legacy of an organisation. It focuses on the distinctive and significant elements that characterise an organisation's history and identity over time. Organisational heritage identification refers to the process by which members of the organisation identify and emotionally connect with the organisational heritage. It focuses on the personal connection and emotional attachment of the organisation's members to the organisational heritage.

Later, Balmer and Burghausen (2015a) expanded and elaborated on this concept by defining three schools of thought about organisational heritage. The three main concepts and schools of thought under the umbrella of organisational heritage are:

1. Organisational heritage identity: it represents the omni-temporal characteristics perceived and remembered by the members of the work organisation.
2. Organisational heritage identification: it refers to how the members of the organisation identify and perceive themselves in terms of omni-temporal characteristics, thus those characteristics that they feel are always present in their work organisation over time.

3. Organisational heritage cultural identification: this refers to the multi-generational identification of members with the corporate culture of their work organisation.

This article is significant because it defines these concepts in depth, bridging the gap between business marketing and organisation/management studies. It also highlights the importance of integrating organisational heritage studies with organisational memory and organisational behaviour studies.

In conclusion, this first strand of studies has traced the first development of research on corporate heritage, particularly in the fields of corporate marketing and corporate identity, and has laid the foundations for the other two strands of research. The initial exploration of monarchies as corporate brand entities laid the groundwork for the conceptualisation of "corporate heritage brands". The 5Rs model, translated in requirement, relevance, respective, responsive, and reliable, has established key criteria for effectively managing a corporate heritage brand. Balmer's subsequent emphasis on corporate heritage identity marked a shift towards understanding heritage from a corporate identity perspective. The concepts of "relative invariance" and "omni-temporality" have become crucial in recognising that heritage identities are a mixture of continuity and change over time. Therefore, past, present, and future are linked together. In addition, two important concepts have emerged: "corporate heritage marketing", an organisational philosophy, and "total corporate heritage communication", which emphasises the importance of complete and integrated communication of the company's heritage. Burghausen and Balmer's exploration of corporate heritage management highlights the managerial aspect, emphasising the importance of managers' awareness and responsibility for heritage within organisations. The Corporate Heritage Identity Stewardship (CHIS) framework outlines the key dimensions of managerial awareness: positionality, custody, and heritage awareness. The concept of "organisational heritage", as introduced by Balmer and Chen, has extended the debate by distinguishing between organisational heritage and identification of organisational heritage. The three schools of thought – identity of organisational heritage, identification of organisational heritage and cultural identification of organisational heritage – emphasise the importance of integrating studies on organisational heritage with wider research on memory and organisational behaviour. Overall, this chapter's research path has significantly contributed to the evolving understanding of corporate heritage. It has filled the gaps between business marketing and organisational and management studies, introducing key concepts. The integration of these concepts provides a comprehensive framework for examining the complex dynamics of corporate heritage within the broader context of corporate identity and organisational behaviour. This strand forms the basis of the literature on heritage marketing, from which the other two strands identified also originate.

1.2.2 Heritage marketing: development and systematisation of tools

A second strand of studies focuses on heritage marketing tools.

Initially, a significant part of the research on this topic focused on individual tools, albeit frequently overlooking the broader strategic and managerial implications. Notably, extant literature accords significant attention to the corporate museum, with several contributions presenting case studies (Stigliani & Ravasi, 2007; Montella, 2012; Bertoli *et al.*, 2016; Iannone & Izzo 2017; Carù *et al.*, 2017). Early academic research mainly focused on the nature of preserved and exhibited materials, specifically emphasising historical, cultural and artistic dimensions (Danilov, 1992; Amari, 2001) alongside the collection and management of these assets (Negri, 2003; Bulegato, 2008), i.e. who manages them, what they contain and what they are used for. This approach has made the literature rather fragmented. Furthermore, a prevailing methodological characteristic across these studies is their qualitative orientation, predominantly based on the analysis of a limited number of cases.

However, the evolution of the socio-economic and cultural context and the consequent shift towards relational marketing strategies and experiential aspects have led researchers to reconsider the corporate museum phenomenon through a more distinctly economic lens (Castellani & Rossato 2014). Thus, the corporate museum has been redefined as an «extension of the organisation's public relations and marketing efforts» (Nisley & Casey 2002, p. 3), rather than a passive collection of organisational artefacts. Researchers have analysed the changing role of corporate museums and their integration into broader corporate dynamics. An aspect that emerges is that the corporate museum has been recognised as a strategic tool for corporate communication from the beginning (Gilodi, 2002; Montella, 2010). Indeed, since the early 2000s, scholars have identified several reasons why a corporate museum can be used as a communication tool in the corporate context.

The museum can play an important role for the company, both internally and externally. Internally, it can facilitate the development of new knowledge, skills, and projects. Preserving historical artefacts with valuable cultural knowledge (Ravasi*et al.*, 2011), corporate museums become reservoirs from which designers and brand managers can draw inspiration for new products, innovation and the enhancement of the company's cultural and artistic values (Castellani & Rossato 2014). Additionally, a company's past, when enhanced with a strategic narrative, can serve as a wellspring for envisioning future plans, fostering creativity, and augmenting the organisation's skill set (Hansen, 2006; Foster *et al.*, 2011; Boje *et al.*, 2016). Moreover, corporate museums play a pivotal role in preserving cultural heritage, defining and managing organisational identity, and identifying internal stakeholders — it can be a tool seamlessly integrated into corporate identity strategies (Amari, 2001; Bulegato, 2008; Gambardella, 2013; Negri, 2003; Piatkowska, 2014). They are multifaceted and can activate and sensitise value systems that contribute to the recognisability and identity of the corporate brand (Quintiliani, 2015). Indeed, the corporate museum preserves a history that can influence employees' perception of the company, fostering pride and a sense of belonging (Danilov, 1992; Stigliani & Ravasi, 2007; Ravasi *et al.*, 2019; Napolitano *et al.*, 2018; Riviezzo *et al.*, 2021a).

Externally, the increasing number of studies on corporate museums as a tool for marketing and strategic communication emphasised the importance of the symbolic elements communicated by the museum in enhancing the overall image of the company (Garofano *et al.*, 2020). Additionally, these museums provide visitors with a tangible and engaging experience, creating a vivid representation of the brand's results (Bertoli *et al.*, 2016). Corporate museums are becoming increasingly important as authentic artefacts in the creation of an organisational narrative identity (Riviezzo *et al.*, 2016; Riviezzo *et al.*, 2021; Napolitano *et al.*, 2018). Thus, this not only provides opportunities for differentiating and positioning corporate images (Gilodi, 2002; Castellani & Rossato, 2014), products and/or brands, but also highlights their significance within the overall organisational strategy (Balmer 2011a). Indeed, corporate museums are configured as instruments capable of establishing an emotional bond with customers and other external actors (Misiura, 2006). Indeed, the corporate museum is recognised as a corporate communication tool, useful for strengthening relational capital. It can narrate the company's history and the benefits it has provided to a wide range of stakeholders (Montella, 2010). The museum is a medium that effectively conveys elements suitable for training stakeholders to perceive the enterprise in a way that influences its long-term behaviour for its own benefit (Brown & Davis-Brown, 1998). Due to this ability, the corporate museum is recognised first as a tool for total relationship marketing (Montella, 2018) and then as a tool of total relationship heritage marketing (Simone *et al.*, 2022). Finally, scholars have also pointed out that museums are not only specific company resources but also resources of the place where the company operates (Rudd & Davis, 1998). Precisely because the company museum can also be seen as an expression of the territory (Quintiliani, 2015), corporate museums have been studied as tourist attractions and part of industrial tourism (Xie, 2006; Frew, 2008; Otgaar *et al.*, 2010; Otgaar, 2012; Lee, 2016; Riviezzo *et al.*, 2021b).

The literature devoted to other tools is less consistent, but currently, there seems to be a growing interest, in particular, in the role of heritage in corporate publishing (Martino, 2019; Martino, 2022; Martino, 2023), as well as in the visual and design aspects of the brand (Bargenda, 2015; Sammour *et al.*, 2020; Pecot *et al.*, 2022; Burghausen, 2023; Balmer, 2023).

In parallel with the study of individual instruments, a few scholars have attempted to systematise useful tools for heritage marketing strategies.

Montemaggi and Severino (2007) have proposed a first attempt to organise heritage marketing and its tools. Through a specific analysis of the Italian context, the authors outlined the most effective tools to enhance the corporate heritage, summarised in Tab. 2. The corporate archive is identified as the crucial starting point for a heritage marketing project. Indeed, it is seen as the tank in which to search for and collect material for the strategy. Although it is an essential tool, the archive, according to the authors, is not a direct means of heritage marketing, as it is usually created by the company not to implement strategies, but mainly for educational, academic and cultural research purposes. Conversely, the corporate museum is considered an authentic tool of heritage marketing, it is often directly derived from the corporate archive and it offers many opportunities in the field of marketing and corporate communication, motivating its creation by strengthening the brand identity, celebrating a family brand and using it for direct marketing operations. According to the authors, the museum has four main functions:

- Display function: the museum represents the company’s history to third parties;
- Historical-institutional function: the museum has the role of institutionalising the history of the company;
- “Digestive” function: the museum selects, stores, and digitises the exhibition contents to make them available. This activity allows you to search, save and reuse the company’s history. And this has not only a purely cultural value, as this documentation becomes usable for the company;
- Identification function: the museum can represent the company in a series of institutional, cultural and territorial areas. It therefore carries out a public relations action for the company.

Again, the corporate museum is taken on as a fundamental tool for heritage marketing, but it goes a step further. Indeed, other tools, including communication and events, are identified by the authors. As for corporate communication, the most popular activities include commercial events, institutional communication, advertising, sponsorship and press office activities. As for events, they can be institutional or build loyalty. Finally, the creation of new products based on stimuli from available historical heritage and heritage merchandising are also acknowledged as heritage marketing tools.

HERITAGE MARKETING TOOLS	SHORT DESCRIPTION
Corporate archive	The corporate archive is the basis for the heritage marketing project. It is the reservoir in which to collect and from which to draw useful materials to preserve and use heritage. Since it is created primarily with other intentions (educational, research...), it is not considered as the tool par excellence of heritage marketing
Corporate museum	The corporate museum is the heritage marketing tool par excellence. Thanks to the multiple functions (display, historical-institutional, digestive, identification) that the museum assumes, it is able to strengthen the brand identity, celebrate the family brand and can be used for direct marketing operations.
Corporate communication	Having a communication that stands out is crucial. Heritage can emphasise the "root" that arises from the sedimentation of a brand. The most common business communication activities include: trade events, institutional communication, advertising, sponsorship and press office activities.
Events	The organisation of events is a business strategy useful to build a relationship between the company and those who participate. The corporate event can be institutional or loyalty. In the first case, the event serves to represent the company as an institution and can be used to dialogue with both external and internal stakeholders. In the second case, the event is organised for a specific target of its customers. In both cases the heritage has a fundamental role because it offers myths, languages, symbolic and aesthetic values that make it meaningful compared to the users.
Creation of new products	The products can be reproduced in two ways: the object of the past inspires a new product, therefore a variant not identical to the original is born; or, the object of the past is reproduced in its entirety (or almost). This works especially when dealing with iconic products that have marked an era.
Heritage merchandising	It is not uncommon for companies to make use of their historical heritage also in merchandising, especially if they have products or images that have left their mark on the common imagination. The main ways of using heritage in merchandising are: heritage editorial products, company products removed from their context and used as souvenirs, copies of historical products and serial production products inspired by the company's historical iconographic heritage.

Tab. 2 – Main heritage marketing tools (source: own elaboration from Montemaggi & Severino, 2007)

Afterwards, Martino began to reflect on corporate cultural communication (Martino, 2010). Starting from the research by Urde, Greyser and Balmer (2007), the Italian scholar studied the communication of heritage as it is considered important for reputational purposes, strengthening the identity of an organisation and the relations between the latter and stakeholders (Martino, 2013). Therefore, the author made a review of the different methods of enhancement and communication of the tangible and intangible heritage of companies. She also proposed some strategic-operational models that support the communication of corporate memory. In conclusion, Martino identified the historical archive or museum and the celebration of a company anniversary as more explicit expressions of a brand historicisation strategy and, often, the first step to recognise heritage as a key dimension of brand identity. In addition to these, the author identified other tools to communicate cultural heritage and created a "keyboard" of the heritage mix in which there are multiple operating levers (see Fig. 6). This model contained both online and offline tools, including advertising, points of sale, packaging and product systems, corporate publishing, digital, corporate cinema, and training.

Fig. 6 – Heritage mix: operational communication tools (source: own translation from Martino, 2013)

The research by Napolitano, Riviezzo and Garofano (2016), based on the study of existing literature, categorised the main tools that can be used to enhance historical and cultural heritage. The focus is on longevity as a potential source of competitive advantage for companies able to interpret the legacy of a long and glorious past as a strategic key. The authors proposed a first interpretative framework (see Fig. 7) in which they identify four categories: Storytelling, Branding, Organisation Units, and Public Relations.

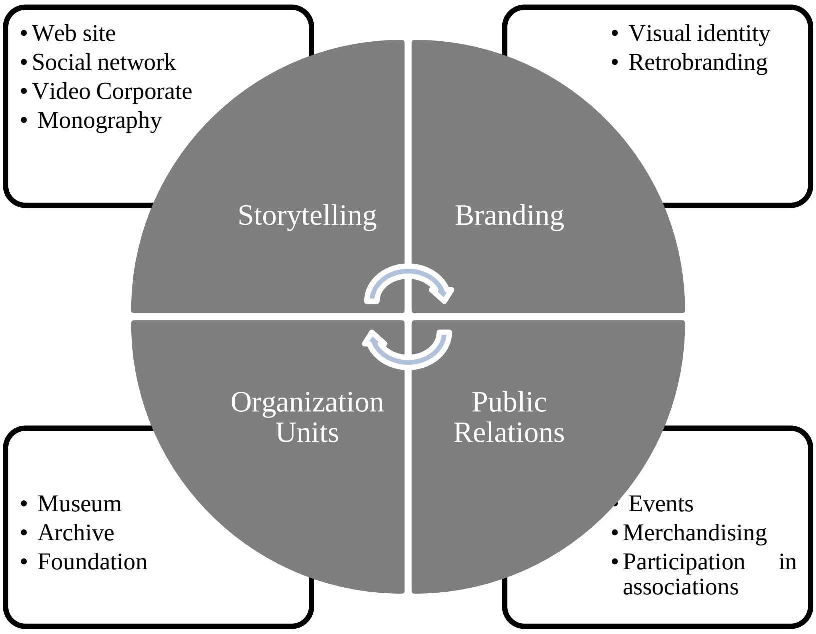

Fig. 7 – Interpretative framework of the main heritage marketing tools (source: own translation from Riviezzo *et al.*, 2016)

In a wider follow-up work (Napolitano *et al.*, 2018), the authors continued to reflect on useful tools for heritage marketing. One interesting aspect that is particularly emphasised is the importance of having a transversal strategic vision. In fact, in many practical cases, companies simply use one or more of the identified tools, sometimes in an unconscious way. In order to achieve results, the organisation needs to be aware of and consciously invest in the enhancement of its historical and cultural heritage, which must be elevated to the status of a strategic asset. Heritage marketing should therefore be defined and interpreted from a process perspective, as an integrated set of planned, organised and controlled activities. The complexity of the managerial process is increased by the need to combine the knowledge and methods typical of marketing with the skills of other disciplines, such as history and business archives, which are essential in the phase of rediscovering historiographical material and, more generally, the traces of the past around which a narrative framework can be built. The authors therefore illustrated the process model for the creation and implementation of heritage marketing strategies and the main stages into which it can ideally be divided, which are:

- Auditing: analysis of corporate and stakeholder identity to identify cultural heritage resources to be leveraged;
- Visioning: defining storytelling objectives and identifying target audiences;
- Managing: identifying and recovering all traces of the past and defining the organisational and financial aspects for the coordinated management of a heritage marketing mix.
- Controlling: monitoring results in relation to objectives through a system of indicators and planning corrective actions.

In the management phase, the heritage marketing mix is presented as a toolbox created by the authors by classifying the main heritage marketing tools (see Fig. 8). Compared to the previous model (Riviezzo *et al.*, 2016.), there is a further consideration. Indeed, as already argued by Martino (Martino, 2013), in operational terms, heritage marketing management can be ascribed to the construction and management of a narrative linked to the history of an organisation and/or its brands/products. It follows that potentially all activities and tools that enable storytelling can be used for this purpose (Salmon, 2008; Fontana, 2013). Therefore, the importance of narrative is emphasised and storytelling, which was a separate category in the previous model, becomes a cross-category element in the updated model: narrating through words, images, sounds, narrating through products and brands, narrating through places, narrating through celebrations and relationships.

NARRATING THROUGH WORDS, IMAGES, SOUNDS

Company autobiography
Series or thematic publications
Leaflets, brochures and handouts
House organ
Historical press review
Historical advertising
Advertising
Video corporate
Documentaries and corporate cinema
Historical films and celebrity testimonials
Website
Social network
Blog, Forum and other digital communities

NARRATING THROUGH PRODUCTS AND BRANDS

Production process
Raw materials
Distinctive skills
Iconic products
Heritage branding
Visual identity
Retrobranding
Limited editions
Packaging
Merchandising

NARRATING THROUGH PLACES

Archive
Museum
Foundation
Factory tour
Industrial archeology
Sales point
Historical headquarters
Other properties

NARRATING THROUGH CELEBRATIONS AND RELATIONSHIP

Anniversary celebration
Temporary exhibitions or display
Conventions and workshops
Other cultural events
Participation in events organised by others
Sponsorships
Participations in associations

Fig. 8 – Ranking of the main heritage marketing tools (source: own translation from Napolitano *et al.*, 2018)

In 2020, the authors (Garofano *et al.*, 2020) resumed this position and made a further reflection on the heritage marketing mix by stressing the need, both theoretically and managerially, to organise the heritage marketing mix into four categories of narrative tools (see Fig. 9). The integrated and contextual use of these tools can make a fundamental contribution to enhancing the multidimensional nature of the identity contained in the company's historical heritage. Scholars also add that storytelling, as a heritage-based narrative process, is crucial because it strengthens the corporate image and influences group interactions. The historical heritage of the organisation is seen as a source of solidity and credibility towards the internal and external public. Indeed, as widely shared (Bhattacharya & Korschun, 2008; Hult *et al.*, 2011; Hillebrand *et al.*, 2015), heritage marketing is seen as a direct effect of the conceptual and strategic evolution of marketing, which should deal with the management of relations with all stakeholders. It is reiterated that the involvement of stakeholders, the creation of shared value and the strategic use of the memory and history of the organisation are, therefore, identifiable as distinctive features of a successful heritage marketing strategy.

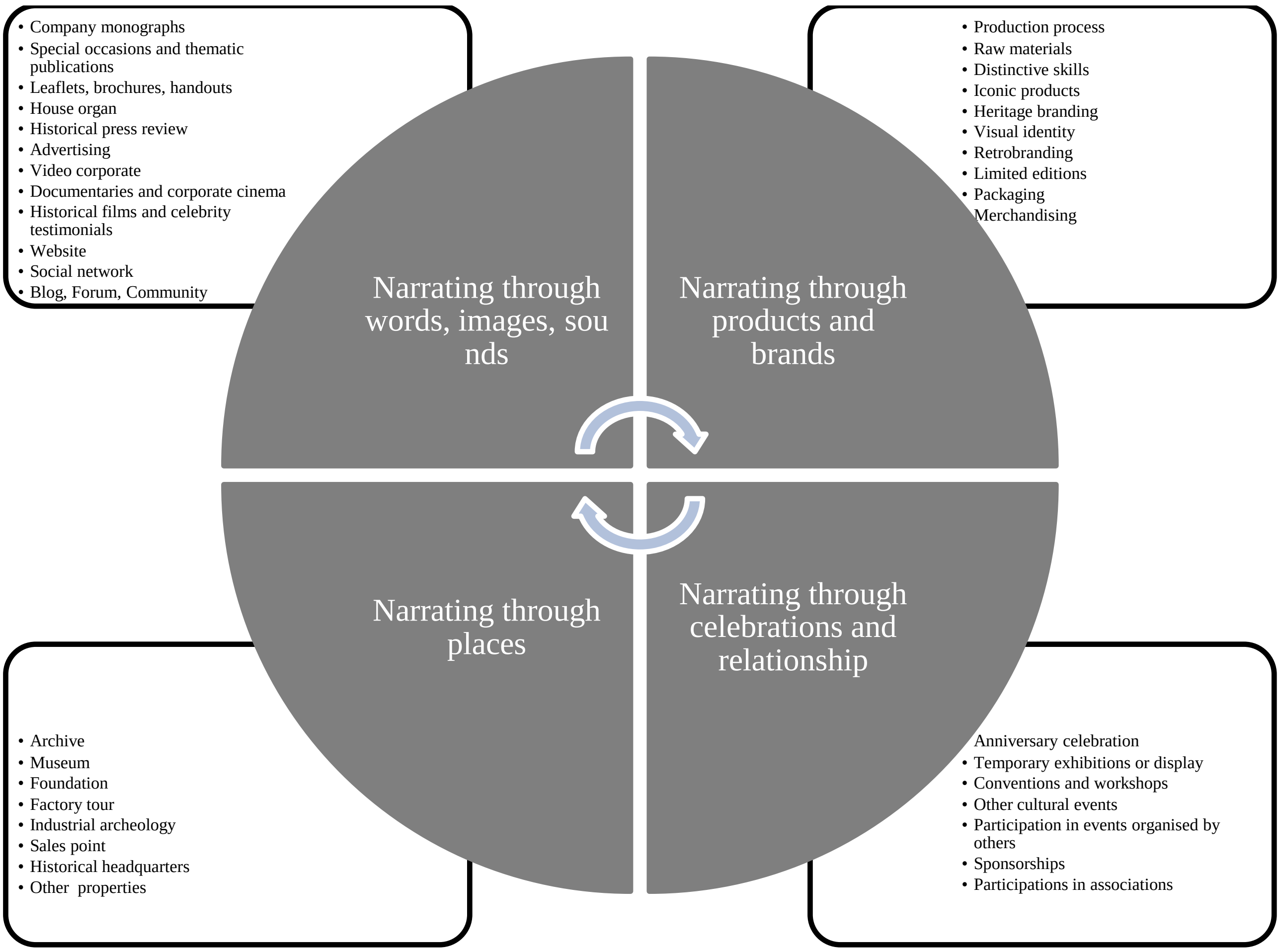

Fig. 9 – Interpretative framework of the main heritage marketing tools (source: own translation from Garofano *et al.*, 2020)

In 2021, the same authors published in English an integrated reading of their studies (Riviezzo *et al.*, 2021). They resumed the updates made in 2018, then the heritage marketing process, the heritage marketing mix as a useful narrative tool for the managing phase and, in 2020, the updated marketing mix (see Fig. 10).

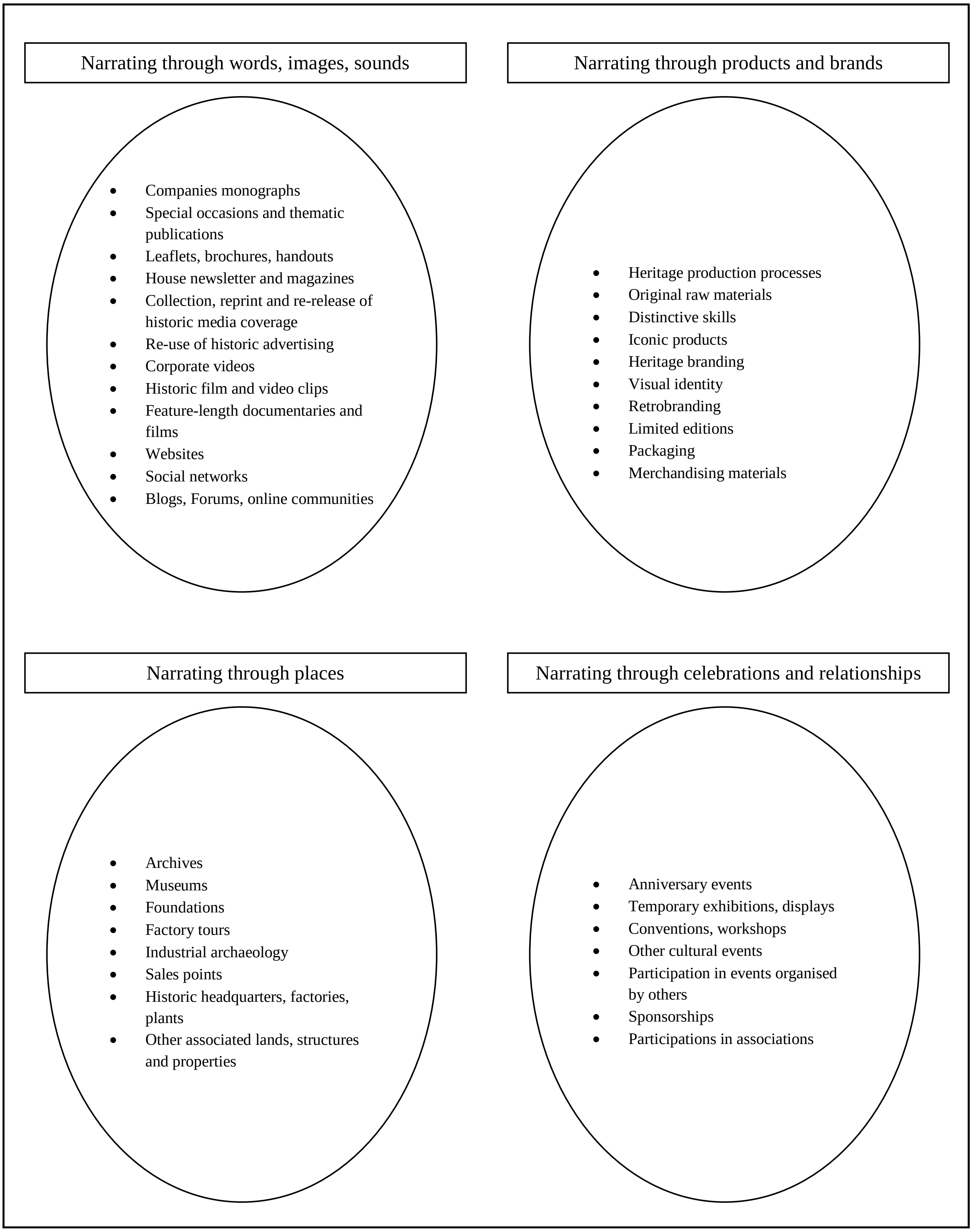

Fig. 10 – Classification of the main heritage marketing tools (source: Riviezzo *et al.*, 2021)

In summary, this research strand examined heritage marketing tools. The research has evolved from an initial focus on individual tools, with particular attention to the corporate museum, to a wider consideration of the strategic and managerial implications. Subsequently, scholars have developed a systematic approach to heritage marketing tools, emphasising the importance of a transversal strategic vision and the need for conscious investment in the enhancement of historical and cultural heritage as a strategic resource. This approach facilitates clear and functional categorisation of heritage marketing tools, providing guidance for those wishing to implement heritage marketing strategies. A clear understanding of the roles of each tool and awareness of their interconnectedness facilitates the creation and implementation of more effective heritage marketing strategies. Thus, it contributes to a holistic and conscious management of the corporate heritage.

1.2.3 Heritage marketing: consumers' perception and measurement scale

A third strand of research has focused on consumers, specifically their perceptions of a brand's heritage and how it impacts them. Furthermore, scales have been developed to measure the brand's heritage and its impact on consumers.

The initial analysis of the topic dealt with the role of time in the consumers' brand image construction processes. It specifically focused on the brand image in the context of time and consumers' past experiences (Rindell & Iglesias 2014). Brand image is defined as a perceptual construct that resides in the minds of observers, developed over time through the accumulation of associations in consumers' memories (Stern *et al.*, 2001; Keller, 2008). Rindell (2007; 2013) introduced the concepts of "image heritage" and "image in use". "Image heritage" incorporates consumers' past brand-related experiences, while "image in use" refers to the images constructed in real time by consumers. Three variables moderate the corporate image: duration of awareness, content of past experiences and key period. The duration of consumer awareness is measured by the first company-related experience that the consumer can recall spontaneously. This implies a mental relationship that develops over time. The "image heritage" refers to the related experiences that the consumer recalls and reworks from various sources during the construction of the image. Finally, the key period refers to a specific moment or particular episodes that significantly influence the consumer's interpretative framework used during the construction of the current brand image. The "image in use" is the continuous process of consumer image construction, influenced by the "image heritage". Thus, the "image in use" is intertwined with the "image heritage", as consumers use the "image heritage"as a frame of reference to construct the current image (Rindell, 2007). Therefore, the concepts of "image heritage" and "image in use" are considered useful in understanding the evolution of corporate brand images as dynamic processes in which past, present and future merge (Rindell, 2013).

In a later development, this line of inquiry intersects with the literature on heritage marketing. Specifically, Rindell, Santos Pinto and de Lima Pinto (2015) sought to enhance the understanding of corporate heritage by exploring "image heritage" in the processes of consumers' construction of corporate and brand images. They drew on the construct dimensions of corporate heritage (Urde*et al.*, 2007) and "heritage image" (Rindell, 2013). Scholars have linked consumers' perception of a company's heritage to its brand heritage, providing insight into the role of consumers in shaping corporate brand heritage. Therefore, consumers' perception of a company's heritage is proposed as an additional dimension in Urde, Greyser and Balmer's corporate heritage model (Urde *et al.*, 2007). As already explored in the first paragraph, Urde, Greyser and Balmer (2007) introduced five dimensions that constitute corporate brand heritage: track record, longevity, core values, use of symbols and the importance of history for brand identity. These dimensions are considered components of identity, but none of these dimensions include a subjective understanding of consumers and their perception of the company's past eras. Since the consumer's perspective aligns with image heritage, which may differ to some extent from the company's perspective on its corporate and brand heritage, understanding corporate heritage involves recognising not only the identity of corporate heritage (Burghausen & Balmer 2014a), but also the image heritage and consumer perspective (Rindell *et al*,. 2015).

The critical role of consumers in the corporate management of temporality is further explored. More specifically, Pecot and De Barnier (2018) built on existing literature on corporate heritage brands (Urde *et al.*, 2007; Balmer, 2011a; Balmer & Burghausen 2015a), heritage branding (Santos *et al.*, 2016) and consumers' interpretation of brand heritage (Rindell *et al.*, 2015; Santos *et al.*, 2016) to inform consumers' interpretation of heritage organisationsand the specificities of corporate heritage management and temporality management. The researchers explored how consumers understand and imagine corporate heritage management and temporality management, particularly in the context of consumer goods. They showed that in the absence of official corporate communication, consumers rely on alternative suggestions, such as corporate heritage image, to imagine how the company manages itself. This research contributes to the understanding of how consumers influence corporate image and suggests that companies should actively communicate with consumers to manage their image. Finally, the results indicate that external stakeholders' perception of time is gradual, suggesting that time should be viewed as a continuum rather than a sharp distinction between past, present and future.

Within this strand, it is possible to trace studies that focus on the consequences of the use of heritage branding on consumers. In other words, such research examines the impact of adopting this strategy on consumer perceptions and behaviour.

Pecot (2016) identified two types of benefits in consumer perception: cognitive benefits and affective benefits.

Cognitive benefits include concepts such as authenticity (Alexander, 2009; Leigh *et al.*, 2006; Napoli *et al*., 2014; Spiggle *et al*., 2012; Rindell & Pinto Santos 2021), brand trust and credibility (Blombäck & Brunninge 2013; Rose *et al.*, 2016; Wiedmann *et al.*, 2011a), perceived responsibility (Blombäck & Scandelius, 2013), and distinctiveness (Blombäck & Brunninge, 2013; Urde *et al.*, 2007) and economic and functional brand value (Wuestefeld *et al.*, 2012).

A particularly debated topic is the importance of authenticity for companies and brands that convey a corporate heritage identity (Blombäck & Scandelius, 2013) Authenticity is considered one of the main strategic competitive advantages, as it can increase consumers' perception of the company's genuineness and trustworthiness (Balmer, 2011a; Balmer, 2011b; Hudson, 2011; Hudson & Balmer 2013; Wiedmann *et al.*, 2011a; Balmer & Burghausen, 2015b). Some authors consider brand heritage as an integral part of authenticity (Beverland, 2006; Napoli *et al.*, 2014), while others interpret it as a consequence of brand heritage (Alexander, 2009; Leigh *et al.*,2006; Spiggle *et al.*, 2012). This is confirmed by Rindell and Pinto Santos (2021) who identify consistency and continuity over time as key elements in assessing authenticity, emphasising the importance of individual consumer experiences in the process (Balmer *et al.*, 2006; Urde *et al*., 2007; Balmer, 2011a; Santos *et al.*, 2016). These scholars have investigated how consumers evaluate the authenticity of corporate heritage brands, pointing out that these brands span three temporal dimensions: past, present and future, maintaining relative invariance despite evolution over time (Balmer *et al.*, 2006; Urde *et al.*, 2007; Balmer, 2011a). Thus, omni-temporality is shown to play a central role in consumer perceptions of authenticity.

Another highly debated cognitive benefit is the perception of quality, with numerous studies demonstrating a positive effect of time specification on quality perceptions. A large body of research in the field of marketing has identified several variables that positively affect consumer perception, including business longevity (Desai *et al.*, 2008), brand heritage (Rose *et al.*, 2016) the brand's antiquity (Baumert *et al.*, 2021), the brand's year of establishment (Pissi & Scarpi, 2019), the brand oldness (Huaman Ramires *et al.*, 2021) and the brand's launch date (Jie, 2020). All these studies consistently support the view that affirmation of longevity generally has a positive effect on consumers. For example, research based on signalling theory (Erdem & Swait, 1998; Erdem *et al.*, 2006) found that brand heritage contributes to perceptions of brand quality and justifies a price premium for both established firms and new entrants (Pecot *et al.*, 2018). The research also outlines the moderating role of consumers' familiarity with the firm and their time orientation. This approach contributes to the understanding of the value of brand heritage for consumers and broadens the perspective on the management and use of brand heritage in external communications. Research suggests that heritage brands should actively communicate information about the company to enhance the positive effect of heritage. Based on these premises, Pecot and Merchant (2022) confirmed that longevity claims increased consumers' perception of quality. The authors also note a discrepancy between objective and perceived longevity and note that the positive effect of longevity decreases over time. The findings suggest that perceived longevity and brand heritage play a mediating role in the "longer is better" effect. The study also showed that the effect of longevity on brand heritage and quality perception is more pronounced when the brand operates in a category perceived to be more competitive. These findings suggest that longevity is a contextual concept, influenced by the product category in which the brand operates.

Affective benefits include concepts such as emotional attachment (Ballantyne *et al*., 2006), positive emotions (Rose *et al*., 2016), brand attachment (Merchant & Rose, 2013), brand relationship (Blombäck & Brunninge, 2013) and affective and symbolic value (Wuestefeld *et al*,. 2012).

Few studies are dedicated to the analysis of the affective benefits associated with the heritage brand. More conceptual research suggests that a high emphasis on brand heritage can generate relevant emotional impacts (Ballantyne *et al*., 2006), establishing meaningful connections with stakeholders (Urde *et al.*, 2007). Empirical research confirms a positive correlation between brand heritage and consumers' affective and symbolic perceptions (Wuestefeld *et al.*, 2012). Merchant and Rose (2013) showed a positive effect on brand loyalty. In a subsequent article, the same authors highlighted a significant positive impact of brand heritage on positive emotions, including nostalgia, authenticity, cultural significance, desire for continuity and stability (Rose *et al*., 2016).

These cognitive and affective benefits also impact consumer behaviour. As already mentioned, for instance, brand heritage contributes to the perception of brand quality and justifies a premium price (Pecot *et al*., 2018). Furthermore, Rose, Merchant, Orth and Horstmann (2016) investigated the influence of the historical brand on consumers' purchase intentions. The authors explored the moderating role of advertising focus and established empirical connections between the heritage brand and various affective and cognitive outcomes. These outcomes include positive emotions, confidence, brand attachment, commitment, and purchase intent. The study significantly contributes to our understanding of brand and brand heritage by emphasising the role of positive emotions, consumer trust, and promotional attention in shaping purchase intentions related to brand heritage.

Within this strand of research, some scholars have focused their efforts on creating measurement scales to assess consumers' perceptions of brand heritage.

One of the first measurement scales developed for this purpose was proposed to explore the perceived values and outcomes associated with heritage brands (Wiedmann *et al.*, 2011a). Methodologically, this work is based on the guidelines proposed by Diamantopoulos and Winklhofer (2001), which suggested steps for the construction of indices based on formative indicators. Conceptually, the work drew on Urde, Greyser, Balmer (2007) who identified five key elements that indicate whether and to what extent heritage is present or potentially traceable in a brand(track record, longevity, core values, use of symbols and the importance of history for brand identity). In addition, Buß's (2007) multidimensional model was used to specify the indicators, which were then verified through exploratory interviews. As a result, the authors constructed a brand heritage index consisting of 15 formative indicators (see Tab. 3). The Brand Heritage Index has been relevant in the cognitive, affective, and attitudinal dimensions of brand strength, influencing perceptions of economic, functional, affective, social value, and corporate reputation (Wiedmann *et al.*, 2011b; Wuestefeld *et al.*, 2012; Wiedmann *et al.*, 2013). A different study (Morhart *et al.*, 2015) incorporated elements of the Brand Heritage Index into a model to measure perceived brand authenticity.

	BRAND HERITAGE: FORMATIVE INDICATORS	**ITEMS**
1.	Brand Heritage Continuity	Brand XY is very continuous.
2.	Brand Heritage Success Images	Brand XY is related to images of success.
3.	Brand Heritage Bonding	I am bonded to brand XY.
4.	Brand Heritage Orientation	Brand XY sets the valuation standard for other brands.
5.	Brand Heritage Cultural Value	The products of brand XY are a part of national treasure.
6.	Brand Heritage Cultural Meaning	The products of brand XY promote a certain way of living.
7.	Brand Heritage Imagination	I have an absolutely clear image of brand XY
8.	Brand Heritage Familiarity	My familiarity with brand XY is very high.
9.	Brand Heritage Myth	Brand XY has a strong cultural meaning.
10.	Brand Heritage Credibility	Brand XY represents honesty and truthfulness.
11.	Brand Heritage Knowledge	Brand XY is highly known in the society
12.	Brand Heritage Identity Value	Brand XY has a strong brand identity.
13.	Brand Heritage Identity Meaning	If somebody praises brand XY, to me, it is a personal compliment.
14.	Brand Heritage Differentiation	Brand XY is unique compared to other brands
15.	Brand Heritage Prestige	Brand XY has a very good reputation.

Tab. 3 – Brand Heritage Index (source: own elaboration from Wiedmann *et al.*, 2011a)

Another scale was formulated in a more extensive research framework with the goal of creating a measurement scale for brand authenticity from the consumer standpoint (Napoli *et al.*, 2014). This process was based on four studies, guided by the existing literature, with the aim of generating and selecting the elements of the scale, following the paradigm proposed by Churchill (1979).The resulting scale comprises 14 items, which are divided into three factors: commitment to quality (seven items), sincerity (two items), and heritage (five items; see Tab. 4). Thus, in the context of this scale, the concept of brand heritage emerges as one of the elements extracted from the literature, representing a dimension of brand authenticity from the consumer's perspective. In this measurement, brand heritage is associated with the concept of nostalgia.

BRAND HERITAGE ITEMS	
1.	Brand has a strong connection to a historical period, culture and/or region
2.	Brand has a strong link to the past, which is still perpetuated and celebrated
3.	Brand reminds me of a golden age
4.	Brand exudes a sense of tradition
5.	Brand reflects a timeless design

Tab. 4 – Brand heritage items from the brand authenticity scale (source: own elaboration from Napoli *et al.*, 2014)

A third scale was also developed according to Churchill's paradigm (Churchill, 1979) as part of a broader model to evaluate the effectiveness of indirect nostalgia in advertising for creating perceptions of brand heritage (Merchant & Rose, 2013). It is interesting to note that this scale focuses on the antecedents of brand heritage rather than its consequences. The scale was developed through a series of studies, including a qualitative study based on focus groups and a literature review that identified two fundamental dimensions of nostalgia: vicarious fantasies about past eras and emotions. Subsequently, 12 brand heritage-relevant elements were selected through quantitative studies, which are included in the final model (see Tab. 5).

BRAND HERITAGE ITEMS	
1.	Stable Brand
2.	Dependable Brand
3.	Solid Brand
4.	Secure Brand that won't disappear tomorrow
5.	Reliable Brand
6.	Respected Brand
7.	Trustworthy Brand
8.	Reputable Brand
9.	Brand is an institution
10.	Authentic Brand
11.	Brand with heritage
12.	Brand has managed the tough times as well as the good times

Tab. 5 – Brand heritage items from advertising-evoked vicarious nostalgia (source: own elaboration from Merchant, Rose, 2013)

Starting from the scales just described and referring to the related literature, Pecot (2016) proposed the development of a new scale to measure the perception of brand heritage. From a methodological point of view, this scale was also developed following the Churchill's paradigm (Churchill, 1979). The decision to develop a new scale is supported by the assumption of three-dimensionality, as the three existing scales previously identified are unidimensional (Merchant & Rose, 2013; Napoli *et al.*, 2014; Wiedmann *et al.*, 2011a). Indeed, according to the existing conceptual framework, brand heritage is conceived from the consumer's perspective as a set of brand associations (Hakala *et al.*, 2011; Hudson, 2011; Keller & Lehman, 2006) that convey both stability and longevity (Balmer *et al.*, 2006; Merchant & Rose, 2013) and adaptability (Gioia *et al.*, 2000). The selection of items was the result of several studies conducted by Pecot, culminating in the creation of a three-dimensional scale consisting of thirteen items (see Tab. 6).

DIMENSIONS		ITEMS	
1.	Stability	1.	A stable brand
		2.	A brand that won't disappear tomorrow
		3.	A brand which will never go out of fashion
		4.	A timelessness brand
		5.	A brand that is very continuous
		6.	A brand that has existed for a long time
2.	Longevity	7.	A brand exuding a sense of tradition
		8.	A brand that reinforces and builds on long-held traditions
		9.	A brand with roots
		10.	A brand that has a strong link to the past
		11.	A brand pointing out to its founding date
3.	Adaptability	12.	A brand that knows how to reinvent itself
		13.	A brand that renews itself

Tab. 6 – Brand heritage scale (source: own elaboration from Pecot , 2016)

In a following study, Pecot *et al.*(2019) further investigated the above considerations. Their aimed to develop a scale to measure consumers' perception of brand heritage. Beginning with a literature review, they conceptualised brand heritage as a perception of the brand's temporal management. The scale presented earlier has been further analysed and refined: the three dimensions of stability, longevity and adaptability remain central, but the number of items has been reduced from 13 to 10 (see Tab. 7).

DIMENSIONS		ITEMS	
1.	Stability	1.	A brand which will never go out of fashion
		2.	A brand that is very continuous
		3.	A timelessness brand
		4.	A brand that won't disappear tomorrow
2.	Longevity	5.	A brand exuding a sense of tradition
		6.	A brand that reinforces and builds on long-held traditions
		7.	A brand with roots
		8.	A brand that has a strong link to the past
3.	Adaptability	9.	A brand that knows how to reinvent itself
		10.	A brand that renews itself

Tab. 7 – Perceived Brand heritage scale (source: own elaboration from Pecot *et al.*, 2019)

Finally, in a recent study (Pecot *et al.*, 2023), the authors highlighted that most empirical findings in brand heritage literature still come from Western Europe and North America. Additionally, data collection for existing heritage marketing scales (Wiedmann *et al.*, 2011; Merchant & Rose, 2013, Pecot *et al.*, 2019) has been limited to a single Western country, specifically Germany, USA, and France. Therefore, the authors developed a measurement scale that can be used across countries, which is useful for a more nuanced assessment of consumer perceptions. In particular, the scale examined the measurement of heritage and brand effects in three countries: the United States, France and South Korea. The final version of the scale has been formulated with four dimensions (Longevity, Symbols, Outdatedness, Adaptability) and twelve elements (see Tab. 8), taking into account the prevailing cultural diversity.

DIMENSIONS		ITEMS	
1.	Longevity	1.	The brand has a strong link to the past
		2.	The brand has roots
		3.	The brand has a rich history
2.	Symbols	4.	The brand has been consistent in its product design
		5.	The brand has been consistent in its packaging
		6.	The brand has unique symbols (such as logos, packaging, colors, or style)
3.	Outdatedness	7.	The brand is stagnant (R)
		8.	The brand seems stuck in the past (R)
		9.	The brand need updating (R)
4.	Adaptability	10.	The brand knows to reinvent itself
		11.	The brand has successfully changed with the times
		12	The brand has continuously evolved

Tab. 8 – Brand heritage scale (cross-cultural) (source: own elaboration from Pecot *et al.*, 2023)

In conclusion, this research strand analyses consumer perceptions of brand heritage and its implications. It includes the development of measurement tools to assess the brand's heritage and its impact on consumers. Scholars have explored the temporal aspects of constructing consumer brand image, introducing concepts such as "image heritage" and "image in use". They have studied the interaction between corporate heritage, consumer perceptions, and temporality management, highlighting the critical role that consumers play in shaping the corporate image. Furthermore, the study delved deeper into the cognitive and emotional advantages linked to heritage branding. It examined notions such as authenticity, brand trust, emotional attachment, and perceived quality. These factors have an impact on consumer behaviour, including their willingness to pay a premium price or their purchase intention. Finally, scholars have developed various measurement scales to evaluate consumers' perception of the brand's heritage, contributing to a more nuanced understanding of this relationship.

1.3 The existing literature on heritage marketing: final considerations on contributions, limits and research proposition

This chapter presents a literature review on heritage marketing. The research carried out by Balmer, Greyser and Urde (Balmer *et al.*, 2006; Urde *et al.*, 2007) is considered as the starting point for this area of research. Three main strands of research were identified (see Fig. 11). The first strand introduced key concepts such as corporate heritage brand and corporate heritage identity, focusing in particular on the perspectives of corporate marketing and organisational and management studies. The second strand looks at the tools to implement marketing strategies, starting with the analysis of individual tools and then integrating them into a framework that promotes a more holistic and strategic perspective. The third strand focuses on consumer perception of brand heritage. It develops measuring scales to assess brand heritage and its impact on the consumer.

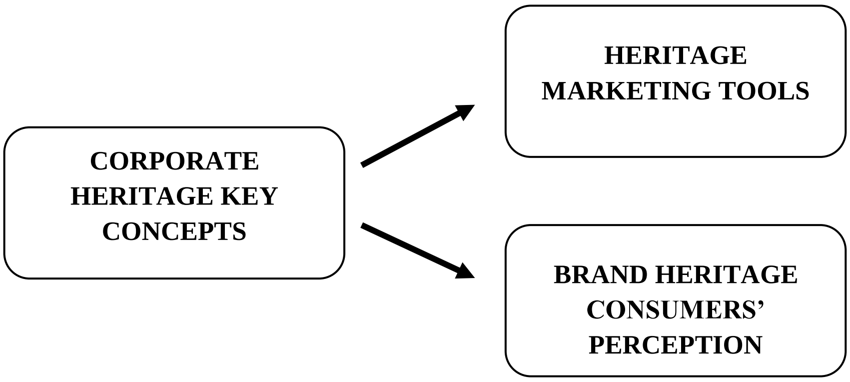

Fig. 11 – Graphical representation of the identified literature strands (source: own elaboration).

Upon analysing the literature related to the three strands of research, some considerations have emerged. The primary consideration (see Fig. 12) pertains to the emphasis on the internal resources of the company. Particularly in the first two strands, the literature explores fundamental issues such as corporate identity and the tools used to communicate and emphasise corporate heritage. This passage demonstrates a focus on how companies manage their heritage as an internal resource, which is crucial for building corporate identity and marketing strategies. The discussion of the relationship with the consumer also emphasises the importance of internal resources. While some contributions may refer to the context, there is no particular emphasis on external resources that the company could use to maximise the value of its heritage, such as the local cultural heritage, especially for companies that are deeply rooted in the area in which they operate. This suggests an opportunity for further research and analysis aimed at enriching the understanding of the potential impact and optimisation of external resources in the context of heritage marketing, thus contributing to a more complete and integrated perspective in the exploration of this field of study.

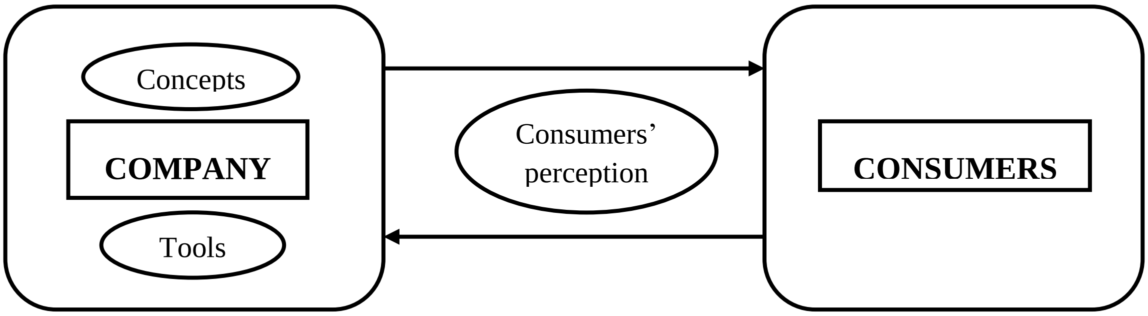

Fig. 12 – Conceptual model of the existing literature (internal resources) (source: own elaboration)

The second consideration concerns the significant emphasis on the temporal dimension in the existing literature. The research focuses extensively on the study of the relationship with time, emphasising elements such as omni-temporality, the prospect of three generations and the longevity of firms. Time is a widely explored and thoughtful aspect. However, the literature on heritage marketing neglects the place factor, despite its relevance for the business. It is important to acknowledge the extensive literature on the relationship between companies and place. Scientific literature extensively covers concepts such as "place of origin", "Made-in", and "country of origin" (CoO) (for instance cfr.: Wilcox, 2015; Brodie & Benson-Rea, 2016; Thøgersen *et al.*, 2017; Papadopulos *et al.*, 2018; Witek-Hajduk & Grudecka, 2022). However, it should be noted that the literature on heritage marketing has not yet explored in detail the relationship between a company and the place. The omission of the spatial context is a significant gap, given that space plays a crucial role in the implementation and perception of the corporate heritage, both as a context and as a resource for the company. Considering the place dimension could further enrich the understanding of the corporate heritage and its impact (see Fig. 13).

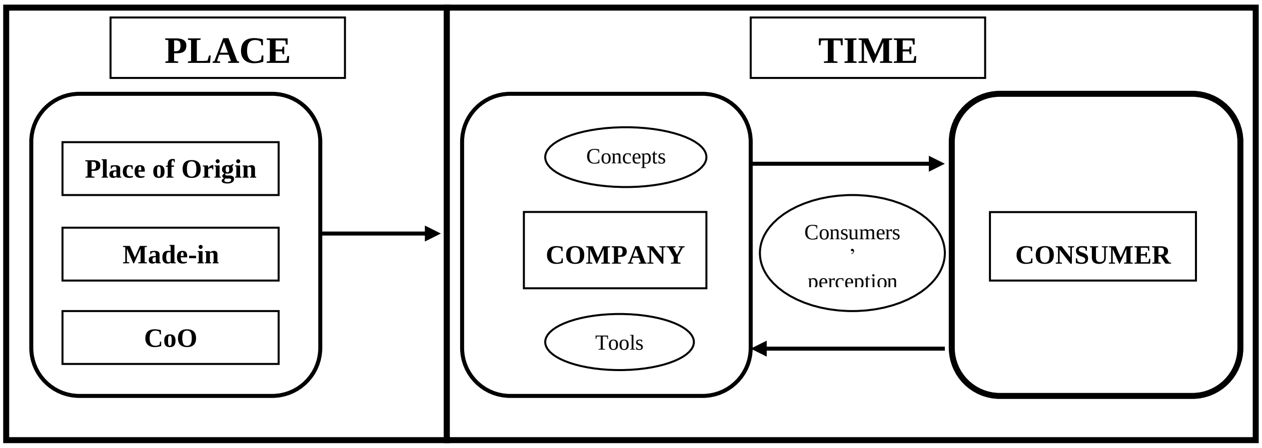

Fig. 13 – Conceptual model of the existing literature (time and place dimensions) (source: own elaboration)

In conclusion, the literature is devoted to analysing the relationship between companies and time and how to utilise corporate heritage resources through heritage marketing. In addition, there is extensive literature on how the company can benefit from place as a resource through concepts such as “Made in”, “place of origin”, and “CoO”. However, a gap to be explored is whether there is a role for place in heritage marketing strategies and how these strategies can contribute to the benefits of the territory in which the business is rooted.

Having identified some gaps, we suggest possible research propositions (see Fig. 14) for heritage marketing research:

RP1 – The potential role of external heritage resources, exploring whether and how heritage marketing can use not only corporate heritage but also external heritage assets (such as local cultural heritage) as a resource.

RP2 – The potential role of the place dimension, deepening the role of place and relationships with place in heritage marketing strategies.

RP3 – Impact on the territory, analysing how heritage marketing strategies affect the surrounding territory and contribute to local well-being.

This literature review has its limitations. In fact, it considers only publications in Italian and English. Moreover, it is based only on specific literature on heritage marketing. However, there is an opportunity to extend the review to other scientific areas, such as “place of origin”, “Made-in” and “country of origin”, in order to deepen the understanding of the spatio-temporal dimensions within heritage marketing.

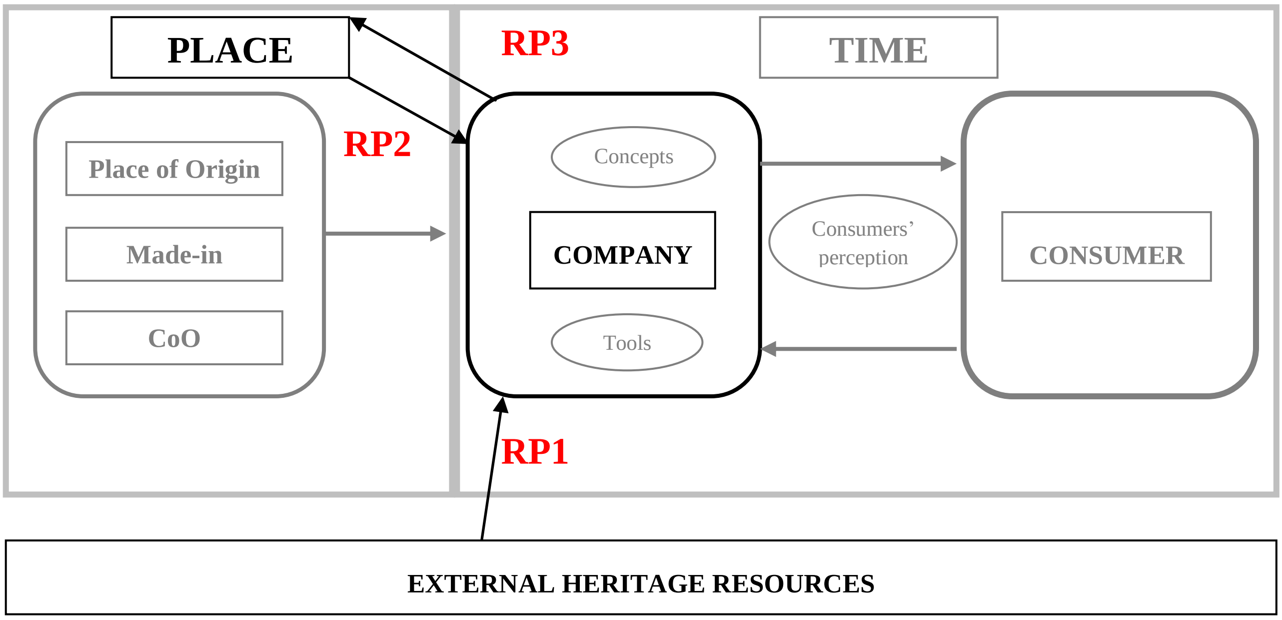

Fig. 14 – Conceptual model of possible research propositions (source: own elaboration)

2. Enhancing local cultural heritage and milieu to promote the wine industry and tourism.

Light and shade from the Climats du Vignoble de Bourgogne

2.1 Introduction

Place of production has, for several reasons, a primary role in the wine industry, as highlighted by the notion of *terroir*. This concept was first developed in France to define the correlation between the specific physical characteristics of a place (e.g., the soil and slope of a vineyard, the grape blend, and the local climate) and the character of its final products. This relationship is often mediated by human experience built up over centuries, including agricultural know-how, established viticultural processes and local traditions (Fourcade, 2012). Thus, *terroir* is a key ingredient for determining the quality of a wine.

In France, the practice of identifying wine by its geographical origins isa long established one (Loubère, 1990). Since at least the Middle Ages, producers from high-prestige French regions, whose wines are priced higher than others, have struggled to protect their commercial advantage against large volumes of wines from low-prestige regions (Hinnewinkel, 2004; Colman, 2008). Regularising and using local names in commercial practices is more recent and probably corresponds to a new form of self-protection in an increasingly open economy. Labbé (2011) pinpoints the start of this practice as the 1940s, when the generic name Beaune – one of the main wine towns in Burgundy – was replaced with the names of individual villages in sales.

The Burgundy region is an interesting case study. The safeguard and enhancement of *terroir* in this region are provided by the appellations of controlled origin (AOC). Indeed, place name has been formally recognised as the main element for the wine labelling process, and *terroir* has acquired a legal definition and a more positive connotation (Fourcade, 2012). The AOC system in Burgundy sets out a strict geographical definition of high-quality wine production areas, down to very small portions of the region’s territory. It strictly regulates the grape varieties, winegrowing techniques (e.g., vine spacing, pruning methods) and the winemaking processes that can be used within these areas. In order to be recognised as an AOC, localities must go through a long and laborious certification process conducted by a national committee. Finally, the institutionalisation of *terroir* as the most important indicator of wine has evolved alongside this system and has set in motion an elite-driven folk and traditionalist revival throughout France, with Burgundy leading the way in the 1930s, through the creation of gastronomic societies and Bacchanalian fraternities (Laferté, 2006; Laferté, 2012; Whalen, 2007). Gade (2004) describes this process as a kind of “heritisation” of wine.

Another concept worthy of mention in relation to the importance of place in the wine industry is landscape, which represents the history and heritage of wine regions and is an essential motivation for wine tourism (Cohen& Ben-Nun, 2009). Indeed, landscape is considered one of the main incentives for tourists to visit wine areas (Senkiv *et al.*, 2022). Studies have shown that non-wine-related features, such as atmosphere and landscape, have become crucial attributes of the experience (Rachão *et al.*, 2020). Indeed, a wine landscape provides a deep immersion in the rural environment, culture, and local traditions, especially through gastronomy and architectural heritage (Sigala *et. al.*, 2019.; Back *et al.*, 2021; Costa *et. al.*, 2021; Esau & Senese, 2022; Yadav & Dixit, 2023). Landscape and heritage are thus reasons why tourists are attracted to wineries (Gómez *et* *al.*,2013), whereas the sense of place that is inherent to wine landscapes and regional identities is increasingly being used as a distinctive selling proposition (Harvey *et al.*, 2014).

Hence, we can consider the relationship between the wine sector and place of production as central, especially milieu and cultural heritage. In France, this link is particularly valuable. With a history dating back thousands of years, wine is indivisible from France's culture, heritage, *terroir* and economy (Alonso Ugaglia *et al.*, 2019). This is especially true in Burgundy, where «place matters» (Demossier, 2022, p. 119) and *terroir* is a key element of the wine industry, both as a guarantee of quality and as a cultural aspect.

However, in terms of the research on heritage marketing, the scientific literature has mainly focused on the role of internal assets, specifically corporate heritage (Urde *et al.*, 2007; Montemaggi & Severino, 2007; Balmer, 2011a; Wiedmann *et al.*, 2011b; Wiedmann *et al*., 2013; Burghausen & Balmer, 2014a; Burghausen & Balmer, 2015; Rindell *et al.*, 2015; Riviezzo, Garofano, Napolitano, 2016; Balmer & Chen, 2017; Balmer, 2017; Pecot & De Barnier, 2017; Napolitano *et. al*, 2018; Montella, 2018; Garofano *et al.*, 2020; Riviezzo *et al.*, 2021; Rindell& Santos, 2021; Burghausen, 2022; Simone *et al.*, 2022; Pecot *et al.*, 2023). In analysing their contribution for marketing purposes, scholars have investigated the time factor, by studying historical companies and the omni-temporality of heritage (Riviezzo *et al.*, 2015; Napolitano *et al*., 2015; Pecot *et al.*, 2019; Balmer & Burghausen, 2019; Pecot *et al.*, 2022; Pecot & Merchant, 2022; Burghausen, 2023; Mir Bernal *et al.*, 2023). The potential role of external assets, such as local cultural heritage and milieu, has still not been adequately explored. In view of this gap, this research seeks to answer the following questions:

RQ1: What role could local cultural heritage and milieu play in marketing strategies?

RQ2: What are the positive and negative implications for wine and tourism marketing?

Thus, the research aims to study the relationship between the wine sector, milieu and cultural heritage, to understand the dynamics, the related light and shade, and the role it plays in wine marketing and tourism.

To answer our research questions, the case study methodology was adopted, focusing on the case of the Burgundy region. Several complementary data sources, such as desk analysis, observational surveys, visits to places of particular interest and semi-structured interviews with key actors, were used for the case analysis.

The paper is structured as follows. Section 2.2 discusses the complex concepts of cultural heritage and milieu, highlighting some common elements. The analysis also includes cultural landscapes in relation to the UNESCO World Heritage List (WHL). Section 2.3 introduces the research context: the *Climats du Vignoble de Bourgogne* (France). Section 2.4 presents the research methodology, while Section 2.5 provides the results discussed in Section 2.6. Finally, in section 2.7, conclusions are drawn, highlighting managerial and theoretical implications, research limits and further research.

2.2 Theoretical framework

2.2.1 Cultural heritage: from cultural property to resource

As already detailed in the introduction of the thesis, cultural heritage is a slippery and ever-changing concept. Defining cultural heritage is not easy, because its features are continuously reshaped by the relationships people have with their environment. Indeed, as Schofield (2016, p. 3) argues, cultural heritage is «a matter of perception», thus not an intrinsic property of objects, but a construction, an invention. Therefore, cultural heritage, and consequently its role in and for society, are constantly evolving; they have changed over time and will change in the future.

Legal definitions allow us to understand such changes. Although incomplete and full of gaps, legal definitions recognise cultural societal changes when they are mature. They also provide a new framework for recognising and managing cultural heritage, thus triggering a continuous cycle (Cerquetti & Romagnoli, 2022).

A brief look at some of the definitions provided by international conventions (drafted by UNESCO and Council of Europe) shows that the concept of cultural heritage has expanded to include a variety of assets (see Fig. 15). In 1954, the *UNESCO Convention for the Protection of Cultural Property in the Event of Armed Conflict* (The Hague) introduced the term “cultural property” and extended the category of cultural objects worthy of protection, which only included “historical monuments”, “works of art” and “works of science”. Later, the *Convention Concerning the Protection of the World Cultural and Natural Heritage* (Paris, 1972) legally recognised the close link between culture and nature for the first time. However, the Convention’s definitions of “cultural heritage” and “natural heritage” state that only what has “outstanding universal value” is worthy of protection. In 2000, the *Council of Europe European Landscape Convention* (Florence) introduced an integrated and transversal vision of the landscape and the role played by the population’s perception in identifying the landscape. It extended the concept of landscape beyond excellence to includeeveryday and degraded landscapes. Only in 2003 did the *UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage* (Paris) extend the concept of “cultural heritage” to intangible heritage, considering it a living expression whose evolution should be safeguarded. Finally, the *Council of Europe Framework Convention on the Value of Cultural Heritage for Society* (Faro, 2005) defined cultural heritage as a «group of resources inherited from the past» (Council of Europe Framework Convention on the Value of Cultural Heritage for Society, art. 2, letter a). This shifted the focus from «how and what to protect» (Council of Europe 2005b, p. 4) to «why and for whom to enhance» (Council of Europe 2005b, p. 4), revolutionising the traditional approach to cultural heritage.

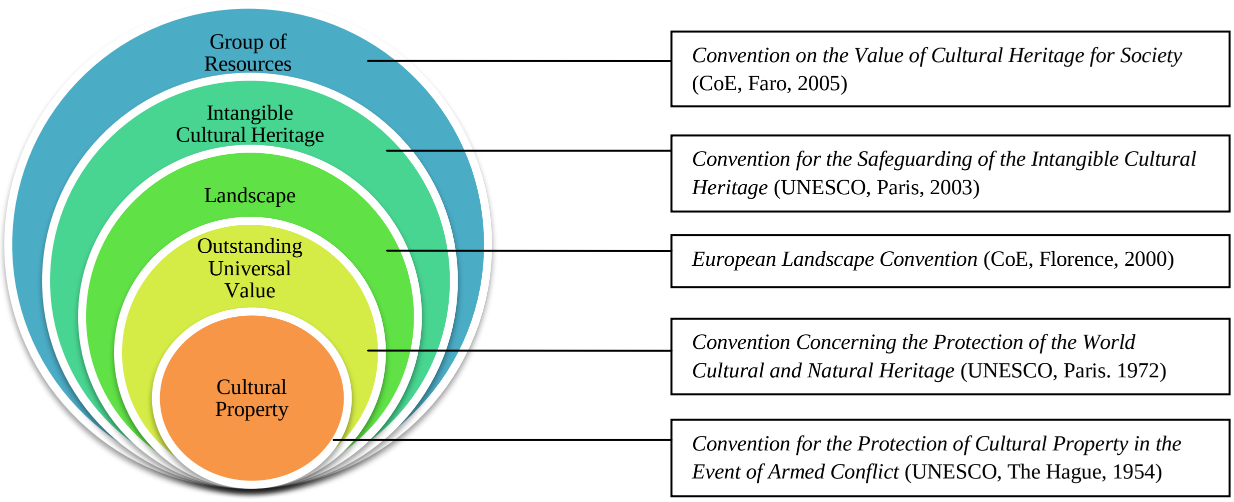

Fig. 15 – Development of the concept of cultural heritage in the international legal framework (source: own elaboration)

Thus, since the 1950s, the international legal framework has broadened the concept of cultural heritage and prompted a paradigm shift in its identification and management, involving *subjects* (from central authorities to heritage communities), *processes* (from top-down to bottom-up), *objects* (from excellence to everyday evidence of humanity and its environment), *values* (from intrinsic value to use value) and *objectives* (from preservation per se to sustainable use and development). In particular, the individual, alone or collectively, is placed at the centre of the cultural process, in a "Vitruvian-type" format (D'Alessandro, 2015, p. 78). The Faro Convention talks of going beyond the top-down approach to accommodate a bottom-up strategy, making people active participants in cultural life. In addition, the Faro Convention's approach goes beyond the erroneous dichotomy between protection and enhancement of cultural heritage (Petraroia, 2010; Golinelli, 2015; Saviano *et al.*, 2018; Cerquetti *et al*,. 2019), and emphasises that enhancement can aid protection by attracting more resources for cultural heritage conservation and spreading awareness about the value of cultural heritage.

The paradigm shift in the value statement, namely from intrinsic value to use value, is paramount. On this matter, Montella (2009) recognises three types of value that can be obtained from cultural heritage: *presentation value*, *landscape value*, and *production value*.

For the purposes of this paper, ouris focus on *production value*, which refers to the market uses derived from cultural heritage and the profits of businesses operating in different sectors, such as restoration, publishing, tourism, construction, real estate, performing arts, etc. In the current context, cultural heritage is no longer a mere source of historical knowledge (embodying an intrinsic value), but also a resource capable of creating multi-stakeholder and multidimensional value. Considering this use value from a business perspective, cultural heritage, especially when layered over time in a specific context, can influence value creation and increase the value of products, particularly in the "Made in" industries (Symbola & Unioncamera, 2011; Golinelli, 2012). In addition, cultural heritage plays a crucial role in external communication. As a group of rare, inimitable, valuable resources built up over centuries, closely linked to a series of local factors and difficult to reproduce in other contexts (Maggiore *et al.*, 2016), it is a powerful tool for communicating the identity of companies and territories (Napolitano & Marino, 2016).

In a nutshell, local cultural heritage can be a factor of production (Macario & Santovito, 2016) and become a resource for a company's competitive positioning in the glocal context. Indeed, consumption processes are currently characterised by a pressing need for authenticity as a cultural counterforce to the deterritorialisationthat results from globalisation. In fact, in recent years, the roots of national competitive identities are increasingly being rediscovered (Anholt, 2007; Aronczyk, 2013; Blair *et al.*, 2014), especially in sectoral contexts where the management and reconfiguration of specific skills rooted in territories is a competitive advantage (Boschma, 2004).

2.2.2 Milieu: a dynamic concept

Milieu is an «ambiguous» (Berque, 1990, p. 28) concept and, therefore, is not always easy to define.The term and the notion of milieu appeared in different scientific disciplines from the 18th century onwards and underwent various modifications in the 19th century (Zanotelli, 2022). Lamarck defined it as external to individuals and involving them, hence the French concept of *environnement*, which derives from the word *environ*, meaning the surrounding territory. The naturalist Étienne Geoffroy de Saint-Hilaire interpreted milieu as a "circumstance" and, under Lamarck's influence, coined the term "milieu ambient" (Zanotelli, 2022). Since the mid-18th century, the French school of geography has defined the study of a place and its ways of life as a means of identifying relationships using various scales, connections and intersections that derive from the purely deterministic aspects of a milieu (Berdoulay, 2017). In this regard, the geographer Vidal de La Blache considered the French word “milieu” and the English word “environment” as synonymous (Vidal de La Blache, 2015). However, Pelletier recently argued that the term “environment” «transmits an envelope of exteriority» that does not correspond to the notion of milieu (Pelletier, 2016). Thus, we can consider Vidal de La Blache’s view a simplification, even though he deserves credit for replacing the deterministic idea of humanity as subservient to nature with that of humanity interacting with nature and considering the geographical environment as a complex and multidimensional concept. In fact, until Vidal de La Blache, the components of the local environment were seen as objectively present and measurable “endowments” or “vocations” expressed by a given territory in terms of possibilities offered to human action. Local specificities and differences were thus considered objective characteristics of a territory that are described by adopting a viewpoint that is completely external to them (Governa, 2001).

In contrast to this approach, the most recent explanations of milieu emphasise the subjective, interpretative and intentional content of any reference to territory and its specificities. Today, we can consider milieu a set of place-specific components constituting the territorial foundation of a specific collective identity and the local substrate of a development process (Governa, 1997). Like cultural heritage, milieu describes the relationships between the past and the future, identity and development. Thus, milieu is composed of objects from the past and includes collectively the specific values that these objects take on in the present in relation to the actions and projects of local actors. As Berque stated, the components of a milieu do not have an absolute value, i.e. we cannot speak of local aptitudes and vocations that have been expressed and defined once and for all. Again, they consist of a set of potentialities expressed by a given territory which, in order to be realised and constituted as resources in the development process, must be recognised, grasped and “used” by a given social organisation (Berque, 1990, p. 103): «Society perceives its environment on the basis of the use it makes of it; reciprocally, it uses it on the basis of the perception it has of it» (Berque, 1990, p. 44).

Indeed, milieu is a relationship that humans build with their environment. It is not the relationship of a subject with an object, but a perspective in which the bipartition between the subject (society) and the object (nature) is eliminated (Berque, 2018). Milieu is an ecological, technical and symbolic system in which we exist; a context full of signs and meanings in real environments. Living beings are modified in and through their milieu, just as the milieu is modified by and with societies (Berque, 2018). Over its evolution, the concept of milieu does not simply refer to place, landscape, and context, but the importance of the relationship with human beings is fundamental: human beings are not acquiescent to nature, rather, they interact with it. Ultimately, milieu is complex, multidimensional and continuously interacting with human beings and society.

Moreover, it is both a source of history and identity and a useful resource for future development. If we analyse these aspects from a business perspective, we can also consider it a source of competitive advantage for brands and companies, especially those with roots in the local production context (Montella & Silvestrelli, 2020; Bernardi *et al.*, 2021; Cerquetti & Romagnoli 2023). Indeed, as mentioned in the previous section (§ 2.1), the “deterritorialisation” of production factors has transformed the processes of mass consumption, triggering a cultural counter-drive. The “return to roots” (Lanternari, 2006) and the “mania for the authentic” (Lipotevsky, 2008) arise in new types of consumption, in which the genuine and the authentic are particularly desired components (Cerquetti & Montella 2012). The competitive advantage of belonging to a specific territory derives from being inimitable and, therefore, represents an «image capital» for businesses (Montella & Silvestrelli, 2020). Indeed, similarly to cultural heritage, *genius loci* and place-specific assets are factors of production capable of qualifying output and strengthening corporate reliability (Macario & Santovito, 2016). Therefore, it is important to define strategies and tools that emotionally involve consumers, who are attracted by the intangible, symbolic and cultural characteristics of a product, as a further way to strengthen their loyalty (Montella & Silvestrelli, 2020).

For companies, this can be particularly important, because making explicit reference to the territory in which the company operates can help communicate its values, vocations and resources and influence the company's development and orientation (Cantù & Bernardi, 2019). This is especially true for the sectors where the identities of places and heritage are intertwined in a nexus of practices (Spielmann *et al.*, 2021), such as the food and wine industry (Riviezzo, Garofano, Granata, *et al.*, 2016; Sgroi *et al.*, 2020; Cerquetti *et al*., 2022; Cerquetti & Romagnoli 2023). The demand for genuine, local, artisanal and traditional products from a territory is growing in the agri-food sector. Therefore, effective enhancement of the relationship between a company, its context and local cultural heritage can be a successful marketing strategy and trigger a virtuous cycle (Askegaard & Kjeldgaard, 2008; De Nisco & Napolitano 2017).

In summary, cultural heritage and milieu have several traits in common (see Tab. 9): both are a source and a resource, are defined and transformed by their relationship with human beings and the environment, have a relationship of reciprocal influence with society and, finally, both have a production value that makes them important assets for a territory.

	Cultural heritage	Milieu
Source and resource	Cultural heritage is no longer a mere source of historical knowledge (incorporating an intrinsic value), but also a resource capable of creating multi-stakeholder and multidimensional value.	Milieu is both a source of history and identity and a useful resource for future development.
Relationship between human beings and the environment	Cultural heritage is defined and continuously reshaped by people's relationships with their environment.	Milieu is not only composed of objects from the past, but also includes the specific values that these objects take on in the present, in relation to the actions and projects of local actors.
Mutual relationship with society	Cultural heritage is "a matter of perception", thus not an intrinsic property of objects, but a construction, an invention. Its role in and for society is constantly evolving: it has changed over time and will change in the future.	Milieu is a relationship that humans build with their environment. It is not the relationship of a subject with an object, but a perspective in which the bipartition between the subject (society) and the object (nature) is eliminated. Living beings are modified in and through their milieu, just as a milieu is modified by and with societies.
Production value	Cultural heritage can influence value creation, particularly for "Made-in" businesses. It can be a factorof productionand become a resource for a company's competitive positioning in the glocal context.	*Genius loci* and place-specific resources are factors of production that qualify output and strengthen corporate reliability.

Tab. 9 – Common traits of cultural heritage and milieu (source: own elaboration)

2.2.3 UNESCO cultural landscapes: an asset for tourism and local development

As discussed in the previous sections (§§ 2.2.1 and 2.2.2), cultural heritage and milieu have many aspects in common. Indeed, keeping culture and nature separate can sometimes be a challenge. At an international level, the first legal recognition of the joint value of culture and nature can be found in the *Convention Concerning the Protection of the World Cultural and Natural Heritage*, approved by the UNESCO General Conference in Paris on 16 November 1972. This document established for the first time a common regime for the conservation and protection of the most important human productions and works of nature (Francioni & Lenzerini, 2008, pp. 4-5).

The first two articles of the Convention give definitions for cultural heritage and natural heritage in the form of lists of constituents: cultural heritage includes monuments, groups of buildings and sites, while natural heritage consists of natural features, geological and physiographical formations and natural sites. In both cases, as already argued in the previous section (§ 2.1), the main requirement for inclusion on the list is "outstanding universal value" (OUV).

UNESCO's approach to cultural heritage placed considerable importance on the traditional categories of art history, great monuments and great civilisations. The concept of cultural heritage itself was limited to masterpieces and a narrow and limited understanding, mostly European, Christian and monumental (Bortolotto, 2007, p. 40). Criticism of this approach led to debate during and after the drafting of the 1972 UNESCO Convention. UNESCO changed its paradigms: making adjustments that reflected the evolution of the World Heritage concept itself also led to an evolution of the concept of cultural and natural heritage and the relationship between them. Indeed, the criteria that must be met to be listed on the World Heritage List (WHL) are regularly revised.

Initially, the treaty separated the two categories: World Heritage Sites of OUV were selected on the basis of six cultural and four natural criteria. Only in Natural Criterion II ("as interaction between man and his natural environment") and Natural Criterion III ("exceptional combinations of natural and cultural elements")[2] is there a reference to the interaction between the two categories. To reiterate this clear division, responsibilities were also clearly apportioned: the International Council on Monuments and Sites (ICOMOS) would be in charge of assessing cultural sites, and the International Union for Conservation of Nature (IUCN) would assess natural sites (Brumann& Gfeller, 2022). In the following years, the debate around World Heritage continued, leading to the introduction of "cultural landscapes" to the list in 1992. Cultural landscapes embody

> the combined works of nature and of man [...]. They are illustrative of the evolution of human society and settlement over time, under the influence of the physical constraints and/or opportunities presented by their natural environment and of successive social, economic and cultural force, both external and internal (UNESCO, 1994, p. 13).

The introduction of the cultural landscape category shifted World Heritage to an anthropological view of culture (Brumann & Gfeller, 2022). Later, in 2003, the Sixth Extraordinary Session of the World Heritage Committee[3] decided to merge the ten criteria, thus marking a significant step towards a holistic approach to cultural and natural heritage (Porcal-Gonzalo, 2023).

UNESCO has also placed emphasis on the relationship between cultural heritage and natural heritage, culture and milieu. If this link is enhanced, it can be a resource for sustainable development and tourism, even more so if the UNESCO label is added to this dynamic.

The primary objective of UNESCO WHL membership is to protect and preserve heritage of exceptional value from potential damage. In addition, this recognition can also affect tourism and local development. Indeed, a World Heritage-listed site can leverage the UNESCO label to attract cultural tourists, convince donors, strengthen political support and raise awareness of the importance of conservation and/or restoration (Wuepper & Patry, 2017, p. 2). Moreover, this recognition is considered an indicator of a site's value and quality (Buckley, 2004),hence increases its popularity (Cochrane & Tapper, 2006; Ryan & Silvanto, 2009).

In official UNESCO documents, the positive effects of heritage on tourism are taken for granted. However, the effectiveness of WHL in promoting tourism and economic growth is an open and controversial question (Cuccia *et al.*, 2016). Even if WHL membership is supposed to produce many positive externalities in the States Parties (De Simone *et al.*, 2019), the scientific literature has extensively explored its different effects. Some scholars agree that inscribing properties on the list, as a prestigious, external recognition that indicates authenticity and quality to international tourists (Cochrane & Tapper, 2006; Ryan & Silvanto, 2009; Wuepper & Patry, 2017), is a powerful heritage

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[2] Operational guidelines for the implementation of the UNESCO World Heritage Convention: https://whc.unesco.org/archive/opguide77b.pdf

[3] Revision Operational Guidelines for the Implementation of the World Heritage Convention: https://whc.unesco.org/en/decisions/6165/

enhancement tool that should positively attract tourist flows and promote economic growth and local development (Yang *et al.*, 2011; Cellini, 2011). In addition to affecting tourist flows, other benefits of WHL membership are increased awareness on the part of local populations, identity and participation in heritage enhancement and conservation.

However, tourism development can also have negative impacts, especially on sustainability (Landorf, 2009; Pencarelli & Splendiani, 2010; Lo Piccolo *et al.*, 2012; Caust & Vecco, 2017; Tesfu *et al.*, 2018; Tien *et al.*, 2019; Krajíčková & Novotná, 2020). In particular, UNESCO recognition entails the risk of neglecting residents' needs in favour of tourists, such as when some offerings are re-designed for visitors. This reorientation may lead to the disappearance of traditional activities that are functional to local communities and turn places into inauthentic, staged "non-places" that are socially degraded and economically and civically impoverished (Pencarelli, 2020). In addition to these negative economic and socio-cultural externalities, increased visitor numbers can lead to congestion, pollution, deterioration of heritage sites, damage to natural sites and unsustainable tourism development (Van der Borg *et al.*, 1996; Moscardo, 1996; Jimura, 2011; Assumma*et al.*, 2022; Boháč & Drápela, 2022).

Therefore, World Heritage Site status holdsvery interesting potential for heritage enhancement, protection, and territorial development, but is a double-edged sword. It can bring tourism and development, but there is also a risk of creating negative outcomes for the territory.

2.3 Research context: Les Climats du Vignoble de Bourgogne (France)

When we look at the French wine sector, there are two things we can consider. First, according to data presented by Statista in 2022, France was the third largest wine market in the world in 2021 and is estimated to be the second largest country by wine market value in 2025 (Statista, 2022). Furthermore, according to the OIV (International Organisation of Vine and Wine), in 2022, France was the second largest country by production (OIV, 2023, p. 9) and the first wine-exporting country by value (in billions of euros), while it was the third largest wine-exporting country in the world by volume (OIV, 2023, p. 17).On the basis of these numbers, France can be considered one of the major producers and exporters able to sell wines at high prices and to enhance the value of its wines. One of the best-known wine regions in France is Burgundy, where 5% of the national wine volume is produced, and the wine and spirits sector generates 11% of the national turnover (Institut National de L'Origine et de la Qualité, 2019) (see Fig. 16).

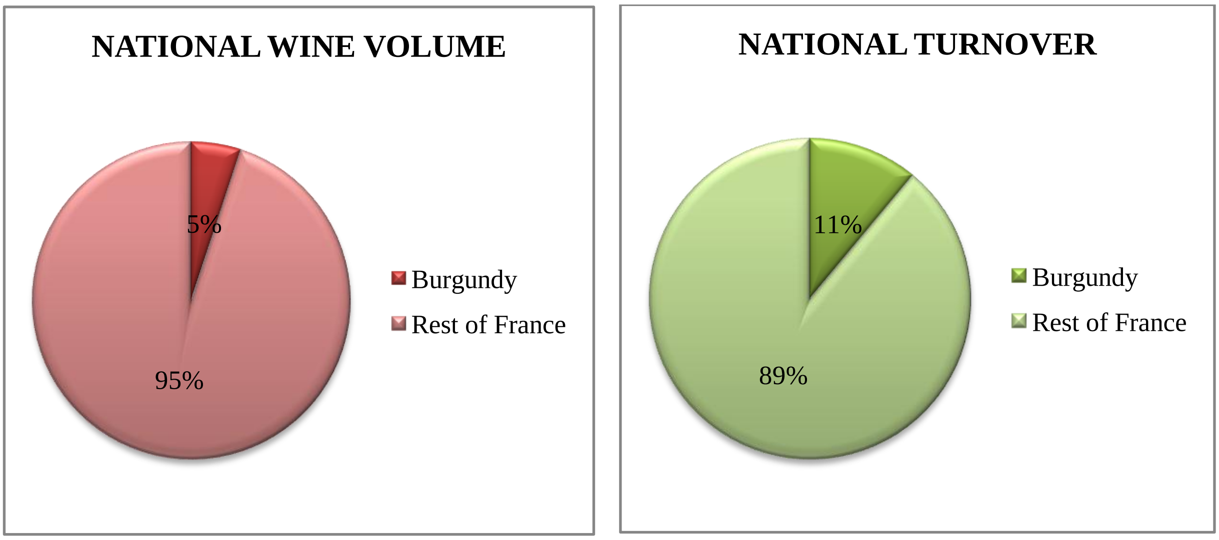


Fig. 16 – Wine and Spirits sector in Burgundy (source: own elaboration from data from the Institut National de L'Origine et de la Qualité, 2019)

The second consideration relates to tourism. According to Orange Flux Vision Tourisme data (2023)[4], Burgundy recorded almost 25 million arrivals in 2021 and more than 30 million in 2022. Tourists are interestingly recognising the region's cultural heritage, the chance to visit towns and villages, the region's gastronomy and vineyards as strengths (Observatoire Stratégie Programmation, 2022). Therefore, the wine sector is not only important for the revenue it creates for wineries, but also for the role it plays for the cultural and tourism sector.

Thus, wine, cultural heritage, milieu and tourism are strongly linked. In Burgundy, *terroir* and the "heritisation" of wine have assumed a special significance. Indeed, the relationship between place and wine has taken shape within a historical landscape, consisting of the *climats* (Whalen, 2010; Garcia, 2011; Association pour l'inscription des Climats du vignoble de Bourgogne, 2012; Garcia & Jacquet, 2020), the winegrowing model which originated in this region and has withstood changes, ruptures and historical crises. In 2015, the *Climats du Vignoble de Bourgogne* were inscribed on the UNESCO list of World Heritage Sites, as they are considered combined works of

[4] Orange Flux Vision Tourisme https://pros.bourgognefranchecomte.com/observatoire/orange-flux-vision/

human beings and nature and areas of outstanding universal value. The site was included in the UNESCO list on the basis of criteria III[5] and V[6].

According to the report on the application for inscription on the UNESCO World Heritage List:

> Les «climats» bourguignons – le Montrachet, la Romanée-Conti, le Chambertin, les Cailles… il y en a 1247 au total – sont des portions du vignoble, précisément délimitées et de superficie réduite, nées des conditions naturelles de sols, d'exposition au soleil ou aux vents, et héritières du travail humain qui les a façonnées, révélées et hiérarchisées au cours d'une longue histoire qui remonte à l'époque romaine. (Association pour l'inscription des Climats du vignoble de Bourgogne, 2012)

Thus, the *Climats* of Burgundy are a *terroir*-based viticulture model composed of precisely delimited plots of land, each with its own characteristics. The *climats* are located in a strip of land that extends almost sixty kilometres from Dijon to the area south of Beaune, to a maximum width of one or two kilometres (see Fig. 17) (Association pour l'inscription des Climats du vignoble de Bourgogne, 2012).

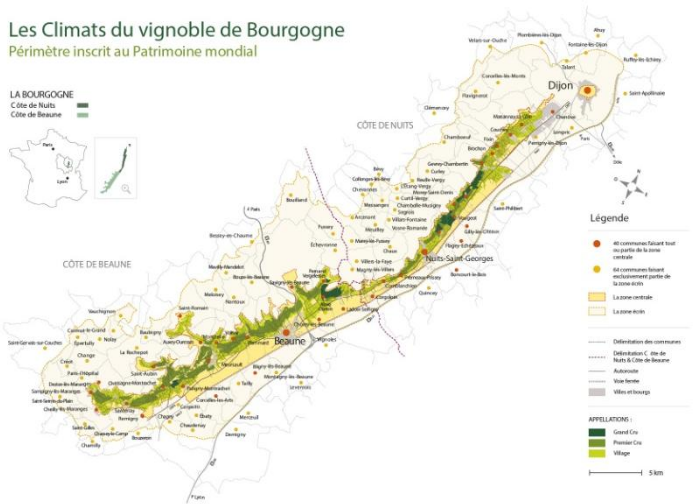


Fig. 17 – The Climats of Burgundy (source: website of the BIVB –Vins de Bourgogne[7])

The UNESCO site includes 1247 *climats* and their related architectural heritage, i.e. the clos, dry-stone walls, *cabottes* (stone huts) and *meurgers*, *cuveries*, caves, winegrowers' houses, historic buildings, but also the old towns in Beaune and Dijon (Association pour l'inscription des Climats du vignoble de Bourgogne, 2012).

The application process for the UNESCO List began in 2006 and involved various actors who, in 2007, established the *Association des Climats du Vignoble de Bourgogne*. Members of theassociationinclude all local actors, the mayors of the cities of Dijon and Beaune, the elected officers from the local authorities, the region and the department of Côte-d'Or, and professionals from the wine sector. The *Association des Climats du Vignoble de Bourgogne* had the task of

[5] According to criterion III the site has «to bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared».

[6] According to criterion V the site has «to be an outstanding example of a traditional human settlement, land-use, or sea-use which is representative of a culture (or cultures), or human interaction with the environment especially when it has become vulnerable under the impact of irreversible change».

[7] Official website of BIVB – Vins de Bourgogne: https://www.vins-bourgogne.fr/

producing and publicising the application dossier. Now its role is to continue managing the listed site, to liaise with UNESCO and organise mediation and knowledge promotion regarding the *Climats du Vignoble de Bourgogne*.

One of the members of the *Association des Climats du Vignoble de Bourgogne* is the Bourgogne Wine Board, *Bureau Interprofessionnel des Vins de Bourgogne* (BIVB). The BIVB is an association that defends and promotes the know-how and traditions of the local trade and viticulture professions. As an interprofessional organisation, the BIVB brings together the viticulture and wine trade and defines its strategic orientations, while defending the interests of Burgundy wines. To this end, it undertakes initiatives with the professional and amateur public, while providing technical support and market advice to professionals. The BIVB is organised into four divisions with clearly defined areas of competence, all of which contribute to the promotion of Burgundy wines: Technical and Quality, Markets and Development, Marketing and Communication and Administration and Finance. The Marketing and Communication Division promotes Burgundy wines in France and abroad. It designs and distributes marketing messages and campaigns. Above all, it helps train selectors (wine merchants, restaurateurs, importers, etc.) and provides consumers with information.

2.4. Research methodology

In order to answer our research questions, the field research investigated the role of cultural heritage and milieu in Burgundy's wine production and related activities, to understand the extent to which they contribute to the sector and sustainable tourism development.

A qualitative approach, namely the exploratory case study methodology (Tellis, 1997; Yin, 2002; Stake, 2008; Yin, 2018), was adopted to answer our research questions. According to Yin (2002), this method enables an empirical investigation of a contemporary phenomenon within its natural context, using multiple sources of evidence.

We used several complementary data sources to thoroughly analyse the phenomenon. First, six months (March–September 2022) were spent in the Dijon area, during which a desk analysis was made and observational surveys were carried out by visiting places of special interest. The desk analysis looked at the websites and social media accounts of local actors, tourism actors and wine producers to gain a better understanding of the research context. From there, key places were visited in the area of the *Climats du Vignoble de Bourgogne* UNESCO WHL site (see Tab. 10).

Visited sites	Brief description
Town of Beaune	The town of Beaune is an integral part of the *climats* cultural landscape. Together with the area's vineyards, it represents the commercial dimension of the production system[8].
Dijon Old Town	The old town of the city of Dijon is part of the UNESCO site, as it embodies the normative and political force that gave rise to the *climats* system[9].
Hospices de Beaune (or Hôtel Dieu)	The Hospices de Beaune was founded as a hospital for poor people at the end of the Hundred Years' War and was completed in 1452. From the second half of the 1400s, the Hospices de Beaune began receiving vineyards as donations, and this tradition continued for five centuries. Today, the wine estate covers about 60 hectares, 50 of which are dedicated to Pinot Noir and the rest to Chardonnay. The hospital was active until 1971. Today, the Hospices de Beaune has become a museum and every November it hosts a

[8]The Climats, terroirs of Burgundy – UNESCO:https://whc.unesco.org/en/list/1425/
[9]The Climats, terroirs of Burgundy – UNESCO:https://whc.unesco.org/en/list/1425/

	wine auction where the fine wines from its vineyards are sold. The revenue from the auction is used to improve equipment and conserve the Hôtel Dieu[10].
Maison des Climats	Using technologies such as augmented reality, the *Maison des Climats* provides the tools to understand the *climats* of the Burgundy vineyard and how the notion of *terroir* has been constructed over 2000 years in the Côte-d'Or, and discover the cultural heritage that characterises this cultural landscape[11].
Palais des États de Bourgogne in Dijon	The *Palais des États de Bourgogne* is the former residence of the Dukes of Burgundy. The importance of the Dukes of Burgundy lies in their constant drive to produce high-quality wines. From the 10th to the 15th century, Burgundy wine's considerable economic and cultural influence began to expand, thanks to the Dukes of Burgundy. The Dukes ensured that Burgundian vineyards held significant economic and cultural influence in much of Europe, with Northern Europe as their primary market. Wine quality was considered important for two reasons. The first was the reputation of the Duchy. The second reason was related to the difficulty involved in transporting the product, hence the quality – and the price – had to be high to justify the effort (De Villaine, 2020).
Château du Clos de Vougeot	The chateau is located inside the Clos de Vougeot, a walled vineyard that is the largest single vineyard in the Côte de Nuitsregion (about 50 hectares). It was created by the Cistercian monks of the Abbey of Cîteaux. The Château du Clos de Vougeot was later added by expanding a small chapel and other buildings that already existed on the site. The chateau was bought in 1945 by the Confrérie des Chevaliers du Tastevin and became the fraternity's headquarters. Although Châteaudu Clos de Vougeot no longer produces wine, it remains the symbol of Burgundy's millennial history[12].

Tab. 10 – Key places visited in the area of the *Climats du Vignoble de Bourgogne* UNESCO WHL site (source: own elaboration)

The research also included semi-structured interviews with key actors (see Tab. 11). Specifically, associations linked to the wine and culture sector, actors from the tourism sector and wine producers were involved. The interviews with local actors were conducted between July 2022 and September 2022, and those with wine producers in January 2023. Interviews were conducted in English or French, either in person or online, and lasted between 27 and 72 minutes. They were recorded, transcribed and analysed manually.

	Respondent category	Date (dd/mm/yyyy)	Length	Language	Online/ Face-to-face
1.	GIP Pole Bourgogne Vigne et Vin	13/07/2022	72 min	French	Face-to-face
2.	BIVB (Management)	26/07/2022	45 min	French	Online
3.	BIVB (Marketing and Communication)	28/07/2022	31 min	English	Online
4.	Former wine producer	04/08/2022	27 min	English	Face-to-face
5.	Tourist guide	25/08/2022	29 min	English	Face-to-face
6.	Association des Climats du Vignoble de Bourgogne	13/09/2022	48 min	French	Online
7.	Wine producer	19/01/2023	42 min	French	Online
8.	Wine producer	19/01/2023	32 min	French	Online

Tab. 11 – Summary of the interviews with key actors (source: own elaboration)

The aim of the interviews was to investigate specific aspects, including:

[10] Official website of the *Office de Tourisme Beaune & Pays Beaunois*: https://www.beaune-tourism.com/explore/discover-the-hospices-de-beaune/
[11] Official website of the *Maison des climats*: https://www.climats-bourgogne.com/en/maison-des-climats_647.html
[12] Official website of the Clos de Vougeot: https://www.closdevougeot.fr/en/

1. *The relationship between cultural heritage, milieu, and the wine industry's marketing strategies:* as already discussed, cultural heritage and milieu are closely interrelated. Both have a strong connection with human beings and society and both are sources and resources. Therefore, the two can be factors of production in marketing activities, by qualifying output and its value. Thus, they are important assets for creating a sustained competitive advantage (Macario & Santovito, 2016). This is particularly true for Made-in companies, such as the wine industry, where the link and the potential are particularly evident. As argued by Phillips (2000, p. 14), «wine is perhaps the most historically charged and culturally symbolic of the foods and beverages with which we regularly have contact». The vine is an integral part of the culture and tradition of many winegrowing regions and references to place play an important role in marketing the sector (Banks *et al.*, 2007). Indeed, wine is intrinsically linked to the place where the vine is planted (Patterson *et al.*, 2018), one of the fundamental aspects of wine quality is *terroir*. Given the nature of wine as a product, it was deemed interesting to investigate whether and how producers and stakeholders in the sector perceive this relationship and whether the cultural aspects embedded in this product are also enhanced and utilised in the sector's marketing strategies.
2. *The effects of the UNESCO declaration in the field of tourism:* the analysis of the connection between cultural heritage, milieu and UNESCO WHL membership highlighted that one area that benefits from WH status is tourism (Cochrane & Tapper, 2006; Ryan & Silvanto, 2009; Cuccia *et al.*, 2016; Wuepper & Patry, 2017), even though the effects of tourism development can be both positive (Cochrane & Tapper, 2006; Ryan & Silvanto, 2009; Yang *et al.*, 2011; Cellini, 2011; Wuepper & Patry, 2017) and negative (Moscardo, 1996; Van der Borg *et al.*, 1996; Landorf, 2009; Jimura, 2011; Lo Piccolo *et al.*, 2012; Caust & Vecco, 2017; Tesfu *et al.*, 2018; Tien *et al.*, 2019; Krajíčková & Novotná, 2020; Assumma*et al.*, 2022; Boháč & Drápela 2022). On the basis of these considerations, the effects on tourism of WHL inscription were investigated for *Climates du Vignoble de Bourgogne*.
3. *The role of the UNESCO declaration on the performance and success of wineries:* besides affecting tourism, UNESCO WHL inscription may also touch other sectors and stakeholders, such as residents, in terms of quality of life, the way it is managed (Vollero *et al.*, 2016, Hanafiah*et al.*, 2021; Esmailpoor *et al.*, 2023) and sustainable development (Landorf, 2009; Lo Piccolo *et al.*, 2012; Caust & Vecco, 2017; Tesfu *et al.*, 2018; Tien *et al.*, 2019; Krajíčková & Novotná, 2020). Here it was decided to analyse whether and how inclusion on the UNESCO WHL affected the wine sector in terms of sales and brand image.
4. *Collaborations between different local actors:* the UNESCO Operational Guidelines for implementing the World Heritage Convention [13] emphasise that collaboration between management authorities, rights holders, stakeholders in the area and local communities is crucial for good management of WHL-registered sites. Collaborations between several stakeholders in the territory may promote the creation of local cultural ecosystems based on cooperation between public and private actors and citizens operating in different sectors, potentially leading to positive effects on the territory's socio-economic development. However, challenges may occur if there is no custom of working on this type of initiative or there is a lack of resources, there is mistrust between partners or they have divergent requirements (Borin, 2015). The

[13]<https://whc.unesco.org/en/guidelines/>, 06.11.2023.

purpose is to investigate how these partnerships were managed and understand the role they played in successful management of the *Climats du Vignoble de Bourgogne* UNESCO site.

5. *The role of sustainability in management policies:* one of the most pressing issues today is sustainability, i.e. meeting «the needs of the present without compromising the ability of future generations to meet their own needs» (Brundtland 1987). Climate change is an important issue that the wine industry faces, with effects, now and in the future, on production (Cardel *et al.*, 2019; Santos *et al.*, 2020), but also on wine tourism (Sottini *et al*., 2021). However, sustainability is not only related to the environment. All four pillars of sustainability and sustainable development – environmental, economic, social and cultural – are considered (Soini & Birkeland, 2014; Sabatini, 2019). Indeed, cultural heritage and cultural heritage management also have a distinct role to play in the construction of a sustainable future (Holtor & Högberg, 2020). The aim here is to understand how respondents perceive sustainability and what actions are implemented in sustainability management.

2.5. Research results

Complementary sources of data from desk analysis, an observational survey and visits to places of special interest provided a thorough understanding of the context and its characteristics. The field research revealed a territory that puts a lot of energy and resources into wine and recognises its cultural importance. This is seen in small winegrowing villages like Aloxe-Corton, Chenove, Nuit-Saint-George, Vougeot and many others that are an integral part of the cultural landscape of the *climats*. In addition, there are many cultural places where the *climats* system and the relationship between cultural heritage, milieu and wine are emphasised. The *Maison des Climats* in Beaune is one that is particularly interesting and can be considered an educational centre where the *climats*and the territory are explained from several points of view, including in geological and historical terms. In addition to these sites, numerous local events and festivals are organised. Saint Vincent, Les Grand Jours de Bourgogne and the Mois de Climats are among the best known.

The fieldwork provided a better understanding of the territory, which in turn informed the way the interviews, whose results are presented and discussed below, were handled. For clarity, the results are organised by topic, as presented in the methodology section (§ 2.4). The results are also summarised in **Errore. L'origine riferimento non è stata trovata.**12.

2.5.1 Relationship between cultural heritage, the wine industry and marketing

The interviews with stakeholders revealed a strong awareness of the link between cultural heritage, the wine sector, and marketing. In fact, the interrelationship between wine and cultural heritage was mentioned in all interviews, and the common opinion is well summarised in a sentence by one interviewee: «our wine without history is not our wine» (KI 4, own translation).

In terms of marketing, it is interesting to consider the role of the BIVB, whose mission is to promote the quality of Burgundy wines. Thus, there is an overall image of the sector in terms of production and the interprofessional organisation works to strengthen that image. One of the interviewees noted that «if you say Beaune, Monthelie, or others, people may not know that this appellation is in Burgundy, so we have asked all our wineries to state *Vin de Bourgogne* or *Grand Vin de Bourgogne* on their labels, depending on the appellation» (KI 8). Although BIVB communications focus on more technical aspects, such as the characteristics of wines, how to drink them, etc., cultural heritage is considered a defining element of the image of *Vins de Bourgogne*.

The values recognised are therefore «*terroir*, history, excellence, human, elegance, authenticity, know-how» (KI 8). As cultural heritage is a key factor in a wine's image internationally, stakeholders devote special attention to it and promote activities to protect and enhance it. This is indeed demonstrated by the involvement of many local actors in the application process for UNESCO World Heritage status and the considerable investments made in cultural heritage. For example, several actors (BIVB, *Association des Climats du Vignoble de Bourgogne*, but also several wine producers, etc.) finance and run restoration projects involving tangible cultural heritage (e.g., *murettes*, *cabottes*...), heritage research projects, training projects for wine producers on the subject of cultural heritage, and even the construction of three *Cités de Climats et de Vins Bourgogne*, in Chablis, Beaune and Macon.

As regards the wine producers, the small number of interviewees revealed two very different ways of viewing and approaching cultural heritage. On the one hand, one of the interviewees stated that «this is very important because it is through our history that we can differentiate ourselves somewhat» (KI 2, own translation). On the other hand, a respondent claimed that «it doesn't really matter to me» (KI 1, own translation).So, on the one hand, there is awareness that showcasing culture is an important way for the industry to differentiate its product in the market and gain a competitive advantage; on the other hand,some wine producers do not consider it an important aspect. In this second case, it is explained that «it's how this narrative was built up at the beginning of the 20th century, with writing about labels, coats of arms, etc. We built up an entire narrative about history, we invented a story that was used to construct the product» (KI 1, own translation).Therefore, there is scepticism about the way the history of the region and its wine is narrated and used, as a constructed, invented history. Nevertheless, wine producers recognise that history is important for the industry, particularly when it comes to competing on the international market. The *climat* concept, and everything related to it, has an important meaning that is «actually commercial» (KI 1, own translation). Even though the storytelling around culture and history can stem from different points, there is a widespread awareness of the role it plays for the sector in terms of market positioning.

Regarding the enhancement and use of cultural heritage in communication and marketing practices, interviewees stated that «we mainly communicate it personally to the customers we receive at the cellar» (KI 2, own translation). The interviews thus reveal that *domaines* do not engage in any particular communication activities, because they know that their own activities and cellars already intrinsically communicate values. In addition, there is also a strong awareness of the potential offered by regional history, by Burgundy's connection to wine, as a resource for family businesses. To some extent, therefore, enhancement takes place «naturally» (KI 2, own translation). However, this is not always sufficient for reaching international markets, which require a different communication strategy,in this case based on associations.

Therefore, the individual wineries, especially the small ones, do most of the presenting and promoting onsite, during visits, tastings or events, and benefit from the work of the associations in terms of the image of Burgundy wines at an international level. Thus, local cultural heritage supports marketing activities to achieve a unique and strongly identity-based competitive position in the global wine market.

2.5.2 The effects on tourism of the UNESCO declaration

The case of Burgundy confirms that UNESCO WHL status has had both positive and critical effects on tourism.

The positive effects include increased exposure of the Burgundy Region and its wines, which raises the image value of the *Vins de Bourgogne*. As mentioned by many interviewees, «tourism is not necessarily immediately useful for selling, it's useful for enhancing your image» (KI 4, own translation). But also «the fact that there is a lot of tourism in the region enhances the value of Burgundy wine» (KI 2, own translation).

With respect to the changes in tourism, one of the local stakeholders said, «the idea is not to increase the number of visitors, which could disrupt both tourism and the towns. The idea is rather to welcome new visitors who are more interested in wine, but also in the cultural landscape, in the way winegrowers work, the know-how, the whole oral tradition, the word of the winegrower – new visitors who take more time to discover the region» (KI 3, own translation).Therefore, the goal is to have a qualitative, not quantitative, change in tourist arrivals. So far, this shift appears not to have taken place, or, at least, is not complete. On the contrary, the increase in visibility and tourist flows come with some critical issues and several reflections emerged during the interviews.

One of the first thoughts concerns this rise in arrivals. Burgundy was already a tourist destination and a further increase was not perceived as a primary need. Moreover, some interviewees consider it a paradox that, at this point in time, tourism has remained high despite the increasing refusal of *domaines* to receive visitors. This leads us to a second reflection. As mentioned, many producers are small family businesses selling wine through other channels and do not have enough products to sell to tourists or for tastings. In addition, due to limited human resources, they find it challenging to offer services related to wine tourism, such as cellar visits or tastings or, relatively simply, to open for tourists at weekends. More respondents said that «almost none of the small winegrowers are open on Sundays» (KI 7); or «if it's to sell one bottle, I have no interest in doing it, because I don't have any employees to do the visits» (KI 2, own translation).A distinction has to be made here. Indeed, the relationship with tourism changes depending on the size and fame of the winery. Larger wineries have suitablehospitality facilities for paid visits and tastings, without the need to turn visitors into buyers. In this, small wineries usually struggle more. Consequently, there is a distinction between tourists who go to the more famous *domaines* and those who go to lesser-known family *domaines*. The former are more interested in the cultural/tourist aspects, whereas the latter are more interested in wines and purchasing. Another critical issue to emerge from the interviews is the incompatibility between copious tourism, and vineyard activities. One of the interviewees stated, for example, that the increased tourist numbers do not lead to problems for tasting and visiting wineries, but they do for vineyards. Indeed, the problematic coexistence of tourists and winemaking activities, which require the use of machines, people, and treatments, is evident here, and the presence of numerous tourists can generate more potential conflicts and tension.

According to some interviewees, in addition to the difficulties that the wine sector can face, the region itself is insufficiently equipped to receive a high number of tourists. This is perhaps because the tourism sector has in recent years struggled to meet the high demand, partly due to the Covid-19 pandemic. One of the interviewees points out that tourism has increased by 30% at other UNESCO World Heritage Sites. This trend for Burgundy would not be sustainable because the type of hospitality the region offers would not be able to handle certain flows. After all, «just the roads in the vineyards are too narrow, it's very difficult to drive in the vineyard, it's very difficult to find a parking place, it's very difficult to find a restaurant» (KI 5).

2.5.3 The effects of the UNESCO declaration on the performance and success of wineries

UNESCO WHL inscription has also had an impact on the wine sector. As in the case of tourism, the interviewees highlighted positive results but also critical issues.

One of the positive aspects that has emerged is that inscription has re-legitimised the term *climat* among wine producers, as well as with consumers, professionals and tourists. The concept of *climat*, along with all the values it carries, was at risk of being forgotten by producers. One of the interviewees explained that «we've realised that this model of viticulture is so demanding, because it's a familiar one, that winegrowers work the soil, the plants, right through to wine production, right through to marketing, and it's often the winegrower who does the pre-sales, goes abroad, travels a lot internationally, so it's demanding. We think they must have forgotten a little about the social and cultural level, and the role of winegrowing in this area» (KI 3, own translation). Therefore, wine producers in Burgundy are mainly small family businesses and often have limited economic and human resources. Over the years, producers have prioritised production and marketing needs, and no longer paid attention to the cultural and social aspects of their work. The UNESCO WH listing has prevented the risk of losing the tangible and intangible heritage linked to *climats* and forgetting its fundamental role in the conservation of biodiversity or the social and cultural aspect of the vineyard. Regarding the effect on the market and environment, i.e. on consumers, professionals and also tourists, UNESCO recognition has clarified the meaning of the term *climat* and better explained that «we think in terms of parcels, because people all over the world don't really understand, they can't understand when we tell them that the wine from this parcel had a certain taste and the one next to it doesn't have the same taste» (KI 4, own translation).

Therefore, UNESCO's recognition has reconnected and refocused attention on the relationship between human beings, *milieu* and cultural heritage. The re-legitimisation and restored importance of the *climats* as a cultural landscape has had another positive effect, namely protection, which many of those interviewed acknowledged. For example, the perception of the positive impact on the territory of the UNESCO heritage declaration arose during an interview with a stakeholder from an association, because inclusion on the heritage list has also made it possible to classify all existing biodiversity. Ultimately, UNESCO recognition has protected the way wine is produced (from the grape harvest to the way the vines are pruned, etc.). Without this protection and the investment that came as a result of inscription, there was a chance that all this might have disappeared. Interesting thoughts emerged during the interviews, with one interviewee offering a practical example of this risk. Given that viticulture in the region is predominantly manual, if the villages died out, winemakers could be forced to hire people from 500 km away for the grape harvest or to mechanise their processes. This could result in the disappearance of this know-how.

On the other hand, inclusion on the UNESCO WHL has also created critical issues that are worth reflecting on. One particular critical issue that emerged from several interviews was the role of foreign investors. Some interviewees saidthatthe renewed exposure of Burgundy has attracted the attention of international investors. Indeed, the increased visibility and value of the site resulting from WH status has led to greater interest in investing in wine in Burgundy, which has consequences. The problem with the arrival of foreign investors is that they have exorbitant economic capacities with which the family *domaines* cannot compete. Consequently, this drives up the price of land and it becomes more and more attractive to sell it. This increases the risk of losing part of the identity of the *climats* wine system, made up of family *domaines* that have passed on know-how from generation to generation.

A further critical issue that emerged is related to the perception that UNESCO WH status comes with a risk of crystallisation for the wine sector, as a result of additional rules with the potential to stop development. On this matter, one of the interviewees said, if it becomes a museum of wine, our winemaking model becomes fixed» (KI 6, own translation).

2.5.4 Collaborations between different local actors

Interviews show that collaboration between different local actors is a key part of managing the *climats*. The establishment of working committees dealing with various topics enables careful, targeted management of several aspects, as these committees take care of all areas of site management work on heritage, the environment, winegrowing, of course, town planning, mobility, transport and so on. So, we have a whole range of committees, and these committees include all the local and regional players who have skills, missions or activities in this area» (KI 3, own translation). One of the interviewees said that «the rationale is really one of association life» (KI 6, own translation), and a special role is played by the *Association des Climats du Vignoble de Bourgogne*, whose mission is to engage with and coordinate all actors involved in managing the World Heritage site. Before the start of the application process for UNESCO World Heritage Site status, collaboration was different. Although Burgundy, and particularly the Côte-d'Or department, was already well developed, wines were very important, and the economy and industry well established, there was no collaboration between the various local actors and, in some cases, there were even tensions among them.As with all systems where several actors collaborate, some situations are more difficult than others, and some aspects work more than others.

2.5.5 The role of sustainability in management policies

Sustainability and sustainable development are important issues for all respondents. However, most of them only focused on environmental sustainability. One respondent explained that «because of global warming, the hills are declining, so we don't make as much wine as we did before. Because of that, many sellers are closed because there is nothing for them to sell» (KI 5). Producers and stakeholders stated that they were aware of this situation and the need to implement changes in practices, such as using fewer pesticides or reducing their carbon footprint. One local stakeholder said, «the issue of carbon fixation, the issue of access to water as a resource are essential, because there are situations where water stress arises, […], this is essential, the soil issue [...], that we might also have vines that wither on account of soil health, these are subjects that are dominant and are obvious and therefore central» (KI 6, own translation).

Few mentioned economic sustainability only as a consequence of environmental problems. One of the wine producers said,«and also the economic aspects, because when a region makes 45% of its sales from 10% of its wine, this raises economic questions» (KI 1, own translation).

In one interview, however, the cultural, social and economic aspects emerged as being closely linked. The interviewee explained that efforts are being made to engage with small villages, both culturally – by launching events, cultural initiatives to talk about *climats*, breathe new life into the relationship with winegrowing and among the inhabitants – and economically and, therefore, socially, by trying to provide services, as there are increasingly fewer of them in the villages. As one of the interviewees said, the reasons behind these strategies are that «we believe that if the villages stay alive, winegrowing will continue to exist. If the villages die out and become a bunch of second homes, our winegrowing model could change completely» (KI 3, own translation).

LIGHT	SHADE
Relationship between cultural heritage, the wine industry and marketing	
- Widespread awareness of the importance of the link between cultural heritage and the wine sector - Cultural heritage is considered a key identity factor for Burgundy wines - Brand umbrella *Vins de Bourgogne* implemented strategies to enhance this relationship - There is investment in the cultural heritage sector	- Not all wine producers consider this relationship important - Not all producers have the resources to implement such strategies
The effects of the UNESCO declaration on tourism	
- Increase in tourist flows - Increase in the value of the*Vins de Bourgogne* brand image	- Difficulties handling larger numbers of tourists - Differences between small and large *domaines*
The effects of the UNESCO declaration on the performance and success of wineries	
- Re-legitimisation of the term *climat* - Protection of the production system andknow-how	- Risk of losing part of identity due to foreign investments - Perceived risk of paralysis of the wine sector
Collaborations between different local actors	
- Collaboration between different local actors is a key part of site management - Associations act as result accelerators	- Collaboration is not uniformly effective on all committees
The role of sustainability in management policies	
- Great attention given to environmental sustainability - There is an awareness, albeit not widespread, of the interrelationship between the four pillars of sustainable development	- Less attention given to economic, social and cultural sustainability

Tab. 12 – Main results summarised in terms of light and shade (source: own elaboration)

2.6 Discussion

Burgundy is a region where cultural heritage, milieu and the wine sector are closely intertwined. Despite a certain degree of scepticism, the research revealed widespread awareness of this link among stakeholders and producers. The role of cultural heritage is fundamental to defining the identity of *Vins de Bourgogne* and the brand image of this product, and it is interesting to highlight the decision to work on image at a regional level. This awareness is transformed into investment in the protection and enhancement of the local cultural heritage, which in turn continues to increase the image of the product and, consequently, of the destination. A virtuous cycle of benefits is thus created. From a managerial point of view, product enhancement at the sector level seems to be a convincing strategy, as it achieves international resonance and creates benefits even for companies lacking the resources to implement such far-reaching strategies.

In this context, inclusion on the UNESCO WHL has brought Burgundy and its wines into the spotlight, and this has had a strong impact on the internationally perceived value of the destination and its products (see Fig. 18). This advantage, however, brings with it several drawbacks, including a lack of resources on the part of wine producers for supporting wine tourism activities, the difficulty combining tourism and wine activities, but also the unpreparedness of the accommodation system for welcoming large numbers of tourists to the area (see Fig. 19). Therefore, the idea of focusing on quality rather than quantity also seems to be functional to the resources and possibilities of the place and the entrepreneurs. Again, it will be necessary to implement further policies and strategies since, at present, tourism creates managerial problems both at the level of the individual winery and at the hospitality level.

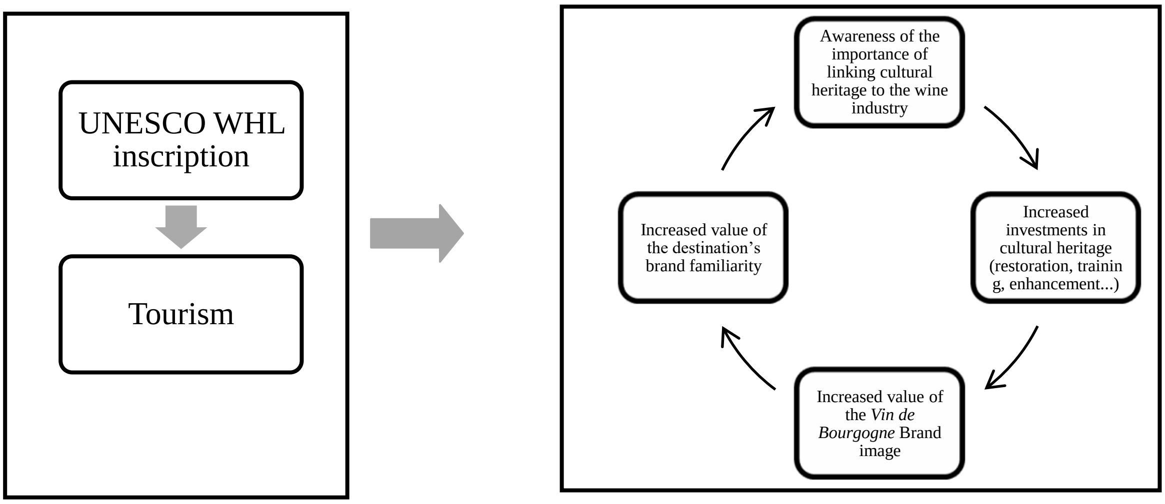


Fig. 18 – Schematic summary of the positive impacts of WHL inscription on tourism, the wine sector and the territory (source: own elaboration)

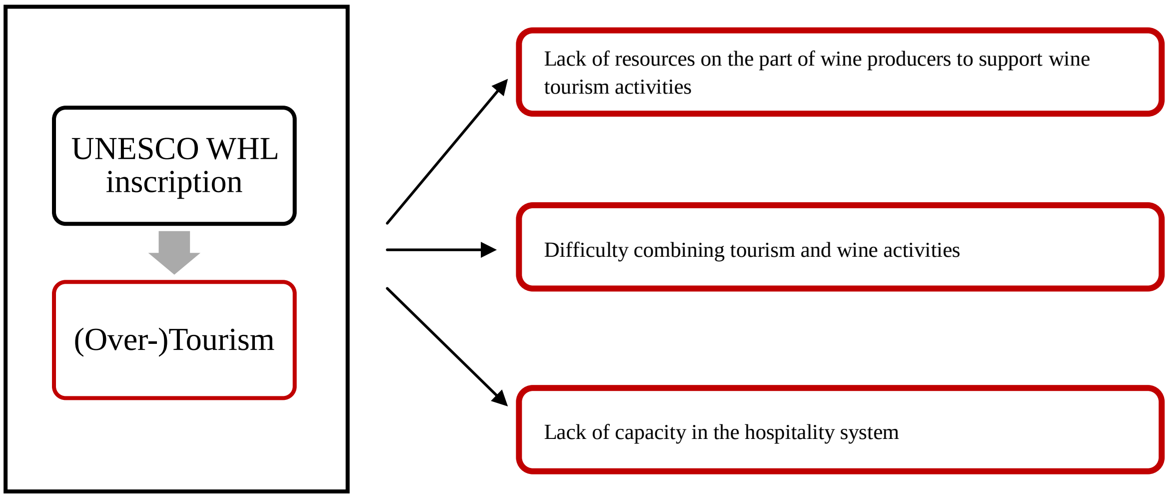


Fig. 19 – Drawbacks of WHL inscription on tourism, the wine sector and the territory (source: own elaboration)

In addition to the effects on tourism, it is also important to note the effects UNESCO recognition has had on the wine sector. Inclusion on the WHL has been crucial because it has refocused attention on the cultural and social importance of the *climats* system and protected the region's unique production system. Paradoxically, it has also had the opposite effect, as this new-found status has attracted the attention of foreign investors. By buying up and running the region's vineyards, they are in danger of altering the *climats*and causing the system to lose part of its identity, which is closely tied to the fact that the region's families have handed down knowledge and working methods through the generations. Another concern is the risk of crystallisation of the wine sector and, thus, an imbalance between protection and innovation. Since this is also a UNESCO site, its cultural value is certainly paramount, so protecting these aspects will be crucial.

Policies to support family business or to regulate the sale of land could be initiated with this in mind. This would help safeguard the authenticity of the *climats*.

Collective organisations have played a key role in this process of protecting and enhancing the site, and also the product. They have acted as an accelerator for dialogue and collaboration between actors who previously worked alone and were sometimes motivated by parochialism. In general, inclusion on the UNESCO WHL has refocused attention on the *climats* as a mosaic, as a whole composed of many parts, and made them start working as a single body.

Finally, the issue of sustainability and sustainable development is central to the wine sector. The interviews show that social, economic and cultural sustainability remains in the background and is mostly underestimated by the interviewees. Nevertheless, there is a strong awareness of the importance of environmental sustainability. Climate change is considered the main problem, as it negatively affects wine production. Indeed, production is already suffering in terms of volume and, as the climate worsens, the issue of the availability of wine could increase significantly. These changes could negatively affect sales and services related to wine tourism, such as the availability of wine for cellar tastings or onsite sales. This would jeopardise a sector that is fundamental to the economy and image of the Burgundy region. Moreover, the four pillars of sustainability – environmental, economic, social and cultural – are heavily interdependent and will determine the very survival of the site. Indeed, for future generations to enjoy the *Climats* of Burgundy, it is necessary to maintain an economic system of small villages that supports the social fabric that is an integral part of the area's wine culture and the *climats* system. Therefore, in a system where environment, culture, economy and society are closely interrelated, it is necessary to implement practices that consider all the pillars, in order to ensure sustainability customs and sustainable development for the territory.

2.7 Conclusions

Cultural heritage and place are fundamental elements in the wine sector. However, scientific research has not yet investigated their role in marketing strategies (Urde *et al.*, 2007; Montemaggi & Severino, 2007; Balmer, 2011a; Wiedmann *et al.*, 2011b; Wiedmann *et al*., 2013*;* Burghausen & Balmer, 2014a; Burghausen & Balmer, 2015; Rindell *et al.*, 2015; Riviezzo *et al.*, 2015; Napolitano *et al.*, 2015; Riviezzo, Garofano, Napolitano, 2016; Balmer & Chen, 2017; Balmer, 2017; Pecot & De Barnier, 2017; Napolitano *et al.*, 2018; Montella, 2018; Pecot *et al.*, 2019; Balmer & Burghausen, 2019; Garofano *et al.*, 2020; Riviezzo *et al.*, 2021; Rindell & Santos, 2021; Burghausen, 2022; Simone *et al.*, 2022; Pecot *et al.*, 2022; Pecot & Merchant, 2022; Burghausen, 2023; Mir Bernal *et al.*, 2023; Pecot *et al.*, 2023). In view of this, this research aimed to reflect on cultural heritage and milieu, two concepts that are difficult to define, have evolved over time and have a number of traits in common. From a business point of view, cultural heritage and milieu are important resources because, being difficult to imitate in other contexts, they are an expression of identity and contribute to market differentiation. In the current market context, marked by the pursuit of the authentic, the local, the genuine, the artisanal and the traditional, companies should therefore look upon these aspects as useful components of a competitive advantage.

Starting with this premise, the paper investigated the relationship between the wine sector, milieu and cultural heritage, in order to understand the dynamics of the relationship, the light and shade, and the role it plays in marketing and tourism in the sector. The research considered a case study of Burgundy. In 2015, the *Climat du Vignoble de Bourgogne* area of this well-known French winegrowing region, with its mix of wine, territory and culture, was admitted to the UNESCO WHL. The analysis of this case focused on specific aspects, including the relationship between cultural heritage, the wine industry and marketing strategies; the effects of the UNESCO declaration on the tourism sector; the effects of the UNESCO declaration on the performance and success of wineries; the role of collaborations between different local actors; the role of sustainability in management policies.

During a 6-month stay in the Dijon area involving interviews with key local actors, several reflections emerged regarding the relationship between wine, cultural heritage and milieu, leading to considerations and possible managerial implications. In particular, it was seen that stakeholders and producers have a strong awareness of the link between cultural heritage, milieu and the wine industry. Indeed, in the wine sector, brand image increases in value, thanks to the enhancement of cultural heritage and milieu, both of which are considered identity-defining factors for the *Vin de Bourgogne* brand. This awareness leads to increased investment in the protection and enhancement of cultural heritage, which further increases the value of the heritage itself. Albeit with criticalities, a virtuous cycle is thus triggered in which cultural heritage and the wine sector benefit mutually from the relationship. All this also creates outcomes for the territory, especially through tourism. Collaboration between the various actors operating in the territory is believed to be an essential factor that can make this cycle truly virtuous.

From a theoretical point of view, the research shows that local cultural heritage and milieu play a significant role in the competitiveness of Made-in companies and places. On the one hand, companies can strengthen their identification with a specific milieu in their communication activities, by positioning themselves in the medium-to-high segments of the market that are seeking high-quality products. On the other, places can gradually become tourist destinations, offering visitors hospitality and a value proposition that are perceived as unique and authentic. UNESCO WH status is an effective accelerator of these processes, which also increases the value of the brand image of places and products. Moreover, it has a positive impact on conservation, enhancement and, in this specific case, on the re-legitimisation of the heritage site. UNESCO recognition can also lead to a risk of over-tourism and a misalignment between visitors' expectations and the sense of identity of local producers and residents, causing environmental and social unsustainability.

From a managerial point of view, Burgundy is an interesting case because the connection between the production sector, cultural heritage and milieu has been enhanced, creating a system in which the wine sector creates value for itself (brand image), for cultural heritage (protection and enhancement) and for the territory (thanks mainly to tourism development). What emerges is that this potentially advantageous system needs to be accompanied by the active collaboration of all those involved and by the training of food and wine, and hospitality operators in order to create human capital that can generate value for the territory. The sector faces many challenges, first among them, environmental sustainability, but it must also handle economic, social and cultural sustainability, which are fundamental for the survival of the product and its related heritage. The impact these activities have on tourism must also be assessed, as it is necessary to have infrastructures that meet the territory's needs. Protection and enhancement of cultural heritage and milieu must play an important role in these challenges, since they are fundamental to the product itself and are useful assets for a more sustainable development.

In conclusion, the research analysed the role of cultural heritage and milieu within the wine sector. Further research could analyse specific actions in order to improve this relationship. One limitation of the research is that it is based on a single case study. For a complete overview of the sector, further case studies could be considered, including longitudinal analyses. Finally, the reflections that emerged can be applied to other industries, particularly those with strong ties to place of production, such as all Made-in sectors.

3. Milieu and cultural heritage as a resource for digital marketing.
Exploring web marketing strategies in the wine industry

3.1 Introduction

In the current globalised world, the local environment (i.e., the milieu) can be a value and a source of competitive advantage for companies rooted in their local production context, such as those whose brands focus on their Made in Italy identity (Montella & Silvestrelli, 2020; Bernardi *et al.*, 2021). Indeed, genius loci and place-specific resources are becoming productive factors qualifying output and strengthening corporate reliability (Macario & Santovito, 2016). As argued by Montella (2009), tangible and intangible cultural heritage stratified over time in a specific context has a "production value"; it affects value creation in many related sectors, directly and indirectly. On the one hand, historical know-how enriches a firm's output. If the distinctive cultural, historical and artistic identity of a place is conveyed by means of suitable marketing strategies, it can enhance the quality of a product, its corporate identity and the value of its brand, in turn supporting competition in the global market, where consumer behaviour is driven by symbolic needs (Montella, 2009, p. 115). On the other hand, place-specific know-how can create social cohesion, increase human capital and quality of life, and generate economic benefits for the local context. This is particularly true for the food and wine industry (Riviezzo *et al.*, 2016; Sgroi *et al.*, 2020). Indeed, in the agri-food market, there is increasing demand for products that are steeped in authentic, local and genuine values and the craftsmanship and traditions of a territory. Therefore, in the agri-food sector, effective enhancement of the relationship between a company, its environment and local cultural heritage can be a successful marketing strategy and trigger a virtuous cycle by creating benefits for tourism development too (Askegaard & Kjeldgaard, 2008; Napolitano & De Nisco, 2017). These circumstances can provide unprecedented opportunities for rural areas, which benefit from a growing interest in slow and sustainable tourism. These areas are far removed from overcrowded destinations and can provide outdoor activities in an unpolluted environment. Moreover, after the COVID-19 pandemic, slow and proximity tourism is an emerging segment that can be improved (Romagosa, 2020).

Nowadays, digital marketing provides an indispensable tool for enhancing these potentialities by using technological advancements in marketing skills to address consumers' wants and desires. Indeed, its role in positioning companies and territories and reaching various stakeholders is fundamental.

Within this framework, the present research discusses the extent to which web marketing strategies encompass cultural heritage and milieu, particularly in the food and wine sector (Yuan *et al.*, 2004; Kim *et al.*, 2009; Perry & Lockshin, 2010; Cassar *et al.*, 2018; Thach & Cogan-Marie, 2018). Focusing on the case of the wine industry in the Marche region, Italy, the study aims to answer the following research questions:

RQ1: How can we assess the quality of heritage marketing via website communication?

RQ2: Do wineries enhance and communicate their relationship with their milieu and cultural heritage through their websites? How?

The paper is structured as follows. Section 3.2 investigates the relationship between corporate heritage and web marketing strategies, discussing both the role of websites as heritage marketing tools (subsection §3.2.1) and methods for evaluating websites and their quality (subsection §3.2.2). After identifying the main gaps in the scientific debate, Section 3.3 proposes a specific framework for including corporate heritage, milieu and cultural heritage in the analysis of corporate websites. The model is applied to 83 wineries belonging to a non-profit association whose main objective is the promotion of wine tourism in the Marche region (Italy). The research aims to understand whether and how wineries are currently enhancing and communicating their relationship with their environment and cultural heritage, what web marketing strategies are being adopted and what innovations can be suggested. Section 3.4 presents the research results, and conclusions are drawn in Section 3.5.

3.2Literature review

3.2.1 Websites as a heritage marketing tool

Over the last ten years, the scientific literature has devoted increasing attention to the role of corporate heritage in marketing strategies (Burghausen & Balmer, 2014a; Garofano *et al.*, 2020; Riviezzo *et al.*, 2021).

Promoting corporate heritage can strengthen corporate culture and build internal commitment and pride by increasing staff motivation and involvement in corporate choices and decisions (Urde*et al.*, 2007; Seligson, 2010; Montella, 2014). Furthermore, investing in historical know-how and tangible and intangible heritage has a key function in reinforcing the range of attributes that qualify products (Montella, 2009). The enhancement of corporate and local cultural heritage also contributes to the positioning and branding of a company in markets, increases brand awareness and helps build long-term relationships with and retention of customers (Rindell *et al.*, 2015; Balmer & Chen, 2017; Wilson, 2018; Pulh *et al.*, 2019). Indeed, it is now widely recognised that heritage positively affects consumers' perception of a brand (Pecot *et al.*, 2018, 2022). In addition, scholars agree on recognising the importance of leveraging corporate and place specific assets (Montemaggi & Severino, 2007; Napolitano & Marino, 2016; Napolitano *et al.*, 2018; Montella, 2018; Riviezzo *et al.*, 2021).

Scholars have analysed not only the external and internal benefits of heritage marketing but also strategies and tools to enhance corporate heritage as a marketing lever. Burghausen and Balmer (2014) identified four fundamental strategies for implementing multimodal and multisensory corporate identity systems, by leveraging design, communications and behaviour, and involving all the senses (sight, sound, scent, taste and touch): 1) narrating, 2) visualising, 3) representing, 4) embodying. Corporate websites play a crucial role in this model. On the one hand, they serve as a tool for narrating corporate identity, including a company's history and the stories of its founder, shareholders and staff. On the other, they are useful for visualising corporate identity from historical photographs and illustrations. Moreover, a website can document a company's life, that is, how it performs traditions, rituals and customs (e.g., during events or festivals), or how it embodies corporate identity in objects, spaces and people (e.g., by providing information on historical buildings, visitor centres, museums, archives, historical artefacts, etc.).

Working from similar assumptions, Garofano *et al.* (2020) and Riviezzo *et al*. (2021) proposed the heritage marketing mix, based on four different categories of storytelling, each of which adopts specific tools:

1) storytelling through words, images and sounds: corporate autobiographies, thematic series or publications, historical press reviews, historical advertising and publicity, corporate videos,documentaries and corporate cinema, brochures, leaflets, websites, social networks, blogs, forums and other digital tools;
2) storytelling through products and brands: production processes, raw materials, distinctive skills, iconic products, heritage branding, visual identity, retro branding, limited editions, packaging, and merchandising;
3) storytelling through places: archives, museums, foundations, factory tours, industrial archaeology, stores, and historical headquarters;
4) storytelling through celebrations and relationships: anniversary celebrations, temporary exhibitions, conventions and workshops, cultural events, participation in events promoted by third parties, sponsorships, and associations.

From a heritage marketing point of view, websites are mentioned explicitly in the first category but are also a tool for presenting a company's products (e.g., information on production processes) and places (e.g., information on museums and archives), promoting its brands (e.g., heritage branding) and documenting its activities (e.g., information on anniversary celebrations).

In summary, the web enables companies to spotlight the history of their brand and its cultural universe, thus intriguing and engaging web users. The official corporate website is one of the privileged channels for a "historicising representation" (Brignone, 2008), as it allows to set up albums, chronologies and multimedia narratives about the company's history, through text and images. The website also acts as a repository for oral memoirs on the company's history, that is, evidence that can bring history alive through transcripts and audiovisual reports of interviews given by a company's key members (Martino, 2013). In this context, a growing number of companies are dedicating a specific section of their official websites to the company's history. As Martino (2013) pointed out, reference to corporate tradition on the web pages of older companies tends to gain prominence and impose itself as the distinctive feature of online self-presentation.

Thus, in the literature on heritage marketing, websites are finally considered an effective storytelling tool by which a multimedia narrative can be implemented (Garofano *et al.*, 2020). For example, as already argued (Mason *et al.*, 2022), the website of a corporate museum could provide an additional experience to that offered by a physical museum. Indeed, in online spaces, documentary and historical resources are always available to visitors and other potential users (Vacca, 2014).

However, few studies have highlighted the opportunities related to digitisation and innovative technologies and none has specifically focused on the role of websites in heritage marketing strategies (Mason *et al.*, 2022).

3.2.2 Methods for analysing and evaluating corporate websites

Since the beginning of the 21st century, digital transformations and the growth of information and communication technology (ICT) have affected many spheres of the knowledge society. For companies in different sectors, being online has become vital for the success of their businesses. In this context, corporate websites have gained a strategic role. No longer are they mere platforms where expert consumers search for information (Marzo-Navarro & Pedraja-Iglesias, 2021, p. 525); now they are also crucial tools for establishing and maintaining relationships with customers, providing an opportunity to create and strengthen new partnerships with stakeholders at different levels.

As suggested by literature reviews on the topic (Deshwal, 2013; Morales-Vargas *et al.*, 2020), the quality of a website and how it is evaluated have attracted the interest of academics and professionals alike, with an upward trend in the first decade of the new millennium. Even though web quality is not a clear concept, it "can be considered the ability of a website to meet the expectations of its users and owners, as determined by a set of measurable attributes" (Morales-Vargas *et al.*, 2020, p. 2). Among these attributes, usability stands out as the most studied dimension, in addition to reliability, responsiveness and content/information (Deshwal, 2013; Morales-Vargas *et al.*, 2020). In 2001, for example, Hassan and Li (2001) identified seven categories for analysing web usability, namely screen design, content, accessibility, navigation, media use, interactivity and consistency.

Moving from technical aspects to marketing purposes, over the last twenty years, the scientific literature has provided various methods and tools for analysing websites and their quality. Ciani *et al.* (2017) made a distinction between subjective and objective evaluations. The subjective evaluation prevails in the analysis of technical quality, while functional quality can be evaluated mainly by adopting software (objective evaluation), in addition to content analysis for some specific parameters.

One of the main approaches for the objective evaluation of website quality is the quality evaluation method (QEM) proposed by Olsina *et al.* (2001). Other examples are provided by the web assessment index (WAI) (Mateos *et al.*, 2001; Miranda *et al.*, 2015; Galati *et al.*, 2016), the 2QCV2Q model (Mich & Franch, 2000) and the 7Cs model (Begalli *et al.*, 2009), which have also been applied in the tourism and wine sectors. The WAI considers four categories, namely accessibility, speed, navigability, and content. The 2QCV2Q model investigates six main dimensions, corresponding to the six Ciceronian loci, namely identity (quis/who?), content (quid/what?), services (cur/why?), location (ubi/where?), management (quando/when?), and usability (quomodo/how?). The 7Cs model focuses on seven evaluation areas, namely content, choice, context, comfort, convenience, customer service, and community.

In a context where consumers are more educated, more sophisticated, more demanding and more digital than ever before, content analysis has arisen as one of the most adopted methods for evaluating website effectiveness (Hsieh, 2012; Neilson & Madill, 2014; Iaia *et al.*, 2019; Marzo Navarro & Pedraja-Iglesias, 2021; Pato & Duque, 2021).

In this debate, Yuan *et al.* (2004) tested a modified version of the balanced scorecard tool, which considers the performance of a business as a multi-dimensional construct. Aiming to achieve a more accurate and comprehensive evaluation, their model measures a website's effectiveness by analysing a number of balanced perspectives, namely technical, customer, internal and marketing. A set of critical success factors is identified for each dimension, which can be helpful for achieving as truthful and complete an evaluation as possible.

In the food and wine sector, websites can enable wineries to market their products and the overall wine tourism experience more effectively (Yuan *et al.*, 2004). Although small and mediumsized wineries do not rely much on revenues from their online activities, the website is nevertheless a primary tool for communicating with consumers, the market and the media. As part of a marketing strategy, it should reflect the winery's image and contain relevant information about the business, as it is often the only point of contact with its consumers (Taylor *et al.*, 2010).

Researchers and industry specialists agree that a winery website should be designed with consumers' needs and expectations in mind. A website should include information about the winery (e.g., its history, its producer, stories about the winery), the wine (e.g., tasting notes, awards, educational information, etc.), tasting rooms (e.g., tourist maps, calendar of events, etc.), memberships (e.g., guest book, discussion groups, surveys) and contact information (Taylor *et al.*, 2010).

As already argued by Yuan *et al.* (2004), a winery website "should generate potential visitor's involvement with the winery and its wine, convey the winery's brand and role as a tourist attraction, sell the entire wine tourism destination, and increase the winery's regional, national and even global presence" (p. 15). According to this perspective, a website can become a digital hub of information about place-specific resources for starting or continuing the experience of a destination as a whole. For this reason, website evaluation models have started considering tourism-related information. On the one hand, they present the history and/or stories about the winery and information on tastings and, on the other, they provide information about tourist facilities, attractions and further local resources, such as historical buildings, museums and festivals, allowing visitors to extend their experience beyond the winery doors (Yuan *et al.*, 2004; Marzo-Navarro & Pedraja-Iglesias, 2021).

However, all these aspects are not yet part of normal website analysis. Despite the many models for analysing corporate websites, there are no standards for evaluating winery websites (Canziani & Welsh, 2016). Many studies adopt a presence-absence approach to assessing a website's features, while others use Likert-type scales or other more complex scoring approaches to assess the quality of each feature and calculate overall measures.

In summary, we can identify at least two main research gaps in the scientific literature: first, the role of websites in communicating corporate heritage has not been sufficiently investigated (subsection §2.1); second, that information about a milieu and its resources is not yet included in the analysis of websites.

Given these limitations, in the following section, we present a model for analysing corporate websites in the wine industry. This model takes into account the relationship between corporate heritage, milieu and cultural heritage as a marketing tool.

3.3 Research methodology

3.3.1 A comprehensive framework for analysing heritage marketing via corporate websites

Starting from the analysis presented in the previous section, we developed a model to analyse web marketing strategies adopted by wineries (see Tab. 13). Given the gaps identified in the scientific literature on this matter, we focused the analysis on corporate websites and integrated existing models to include communicate of the relationship between the company and its environment and cultural heritage.

<table>
<tr><td>1. Corporate data</td><td colspan="3">Name of the company
Website link
City
Province
Foundation year</td></tr>
<tr><th>DIMENSIONS</th><th>VARIABLES</th><th>SUB-VARIABLES</th><th>EVALUATION CRITERIA</th></tr>
<tr><td rowspan="12">2. Content (max. 20)</td><td rowspan="7">2.a Corporate and local cultural heritage (max. 7)</td><td>Winery history (or stories related to the winery)</td><td>0 = absent
0,25 = a few lines (3-5) in other sections
0,5 = an entirely dedicated text section
0,75 = an entirely dedicated section with a short text (< 10 lines) and multimedia elements (photos, videos, audios...)
1 = an entirely dedicated section with a detailed text and multimedia elements (photos, videos, audios...)</td></tr>
<tr><td>Information about the place of origin (regional or local) in the websites</td><td>0 = absent
0,25 = a few lines (3-5) in other sections
0,5 = an entirely dedicated text section
0,75 = an entirely dedicated section with a short text (< 10 lines) and multimedia elements (photos, videos, audios...)
1 = an entirely dedicated section with a detailed text and multimedia elements (photos, videos, audios...)</td></tr>
<tr><td>Presence of photos and/or videos of the milieu</td><td>0 = absent
0,5 = 1-3 elements
1 = > 3 elements</td></tr>
<tr><td>Presence of photos and/or videos of the corporate heritage</td><td>0 = absent
0,5 = 1-3 elements
1 = > 3 elements</td></tr>
<tr><td>Presence of photos and/or videos of the family</td><td>0 = absent
0,5 = 1-3 elements
1 = > 3 elements</td></tr>
<tr><td>Information/references to typical recipes</td><td>0 = absent
1 = present</td></tr>
<tr><td>Information/references to local traditions</td><td>0 = absent
1 = present</td></tr>
<tr><td rowspan="5">2.b Branding (max. 5)</td><td>References to the place of origin (regional or local) in the winery’s name</td><td>0 = absent
1 = present</td></tr>
<tr><td>References to the place of origin (regional or local) in the winery’s logotype or motto</td><td>0 = absent
1 = present</td></tr>
<tr><td>References to the local cultural symbols in the winery’s name</td><td>0 = absent
1 = present</td></tr>
<tr><td>References to local cultural symbols in the winery’s logotype or motto</td><td>0 = absent
1 = present</td></tr>
<tr><td>Foundation date in the logotype</td><td>0 = absent</td></tr>
</table>

			1 = present
	2.c Services and partnerships (max. 8)	Communication of guided tours in the cellar and/or vineyard	0 = absent 0,25 = only related to other events 0,5 = they do guided tours, but do not give additional information 0,75 = dedicated section with information on packages, prices and how to book (by e-mail or telephone). 1 = dedicated section with information on packages and prices with the possibility of online booking
		Communication of wine tasting	0 = absent 0,25 = only related to other events 0,5 = they do wine tasting, but do not give additional information 0,75 = dedicated section with information on packages, prices and how to book (by e-mail or telephone) 1 = dedicated section with information on packages and prices with the possibility of online booking
		Accommodation services	0 = absent 0,25 = they have accommodation services, but do not give additional information 0,75 = dedicated section with information on packages, prices and how to book (by e-mail or telephone) 1 = dedicated section with information on packages and prices with the possibility of online booking
		Communication of membership of associations and/or federations for the promotion of typical products and/or the territory (MTV Marche, Strade del vino)	0 = absent 0,5 = it is communicated 1 = it is communicated and there are links to their websites
		Events in collaboration with other local actors	0 = absent 1 = present
		Information/links to local tourism-related businesses (hotels, restaurants, tourism portals, travel agencies...)	0 = absent 0,5 = it is communicated 1 = it is communicated and there are links to their websites
		Information/links to local cultural & tourism associations	0 = absent 0,5 = it is communicated 1 = it is communicated and there are links to their websites
		Information/links to local cultural sites & other local attractions	0 = absent 0,5 = it is communicated 1 = it is communicated and there are links to their websites
3. Accessibility (max. 5)	3.a Search engine positioning (Google) (max. 1)		0 = absent or from page 4 onwards 0,5 = by searching for the name of the winery, the site is in the first 3 pages of results 1 = by searching for the name of the winery, the site is on the first page of results
	3.b Keyword search (“Cantine vino Marche PROVINCIA”) (max. 1)		0 = absent or from page 4 onwards 0,5 = by searching for “Cantine vino Marche PROVINCIA”, the site is in the first 3 pages of results

			1 = by searching for "Cantine vino Marche PROVINCIA", the site is on the first page of results
	3.c Languages (max. 1)		0 = only Italian 0,5 = Italian + English 1 = more than 2 languages
	3.d Opening hours (max. 1)		0 = absent 1 = present
	3.e Contacts (max. 1)		0 = absent 0,25 = only the telephone number or email 0,75 = telephone number and e-mail 1 = telephone number, e-mail and links to social networks
4. Technical aspects (max. 10)	Overall (max. 10)	Headings URL format Code quality Page titles Mobile Internal links Facebook page Twitter Printability Amount of content Images Server behaviour Popularity Freshness Meta tags Analytics Incoming links Social interest Domain age	Analysed with the software Nibbler (https://nibbler.insites.com/) Consider the "overall" value

Tab. 13 – A comprehensive framework for evaluating heritage marketing strategies via corporate websites (source: own elaboration)

The model is structured in four sections: 1) corporate data, 2) content, 3) accessibility, 4) technical aspects. The first section presents the main data of the companies investigated to get a general overview. The other three sections present a set of dimensions and sub-dimensions. To analyse Sections 2 (content) and 3 (accessibility), we used a binary 0–1 approach, where 0 means "absent" and 1 "present". For some sub-dimensions, a scale with 3, 4 or 5 values (e.g., 0, 0.25, 0.5, 0.75, 1) was chosen. The evaluation criteria for each item are explained in the model. The fourth dimension, technical aspects, was analysed with specific software.

Data were collected between July and August 2022.

1.*Corporate data*. The first section contains the main master data of a company, such as name, official website (if there is one), city and province where its headquarters are located, and year of foundation. These few details are useful for knowing a company's location, age and whether it has a website.

These data gave us initial insight into the web presence and two central dimensions for research: space and time.

2. *Content*. In analysing the content dimension, three aspects were taken into consideration: information related to: a) corporate and local cultural heritage, b) branding, c) services and partnerships.

Given RQ2, the focus was on aspects related not only to corporate heritage but also milieu and local cultural heritage. A number of items were identified for each aspect to be collected.

Starting with the models proposed by Burghausen and Balmer (2014), Garofano *et al.* (2020) and Riviezzo *et al.* (2021), when we analysed information about corporate and local cultural heritage (a), we included the following aspects: the history of the company, its corporate heritage, and its place of origin (including local recipes and traditions). Words, images and sounds were investigated as information providers. Specifically, the analysis addressed the following elements:

- information about the winery's history (orstories about the winery);
- information about the place of origin (regional or local);
- presence of photos and/or videos of the milieu;
- presence of photos and/or videos of the corporate heritage;
- presence of photos and/or videos of the family;
- information about/references to local recipes;
- information about/references to local traditions.

When it came to branding (b), the company name and logo were mainly taken into account. Specifically, the presence of references to the place where the company operates and the place-specific cultural aspects were verified. In addition, the date of foundation was noted. For this section, we investigated the following aspects:

- references to the place of origin (regional or local) in the winery's name;
- references to the place of origin (regional or local) in the winery's logotype or motto;
- references to the local cultural symbols in the winery's name;
- references to local cultural symbols in the winery's logotype or motto;
- date of foundation in the logotype.

Regarding information about services and partnerships (c), we checked for information about visits to the company's premises, i.e., the vineyard and the wine cellar, but also other aspects mainly related to tourism and the enhancement of the territory. Indeed, in this section, the model includes the following sub-dimensions:

- information about guided tours in the cellar and/or vineyard;
- information about wine tastings;
- information about accommodation services;
- information about membership of associations and/or federations that promoted traditional products and/or the territory (e.g., for the selected case study, Movimento Turismo del Vino Marche, Le Strade del Vino, etc.);
- information about events in collaboration with other local actors;
- information about/links to local tourism related businesses (e.g., hotels, restaurants, tourismportals, travel agencies, etc.);
- information about/links to local cultural and tourism associations;
- information about/links to local cultural sites and other local attractions.

3. *Accessibility*. The third dimension included in the model is accessibility, understood both as the accessibility of information and accessibility to the winery's physical space. On the one hand, we looked at how easy it was to find information about it on the web and the languages available on the website, while on the other, we looked for information on how accessible the winery is. The following elements were considered:

- search engine positioning (Google);
- keyword search ("Cantine vino Marche PROVINCIA"/"Wineries Marche PROVINCE");
- languages;
- opening hours;
- contacts.

4. *Technical aspects*. The last dimension was the technical aspects, which were analysed by the software program Nibbler. Nibbler aims to evaluate several parameters (information technology [IT] accessibility, technology, user experience and marketing), giving a sum score of 10. Each parameter is divided into sub-parameters, which can be evaluated repeatedly in each macro-category. Specifically, the micro-dimensions are headings, URL format, code quality, page titles, mobile, internal links, Facebook page, Twitter, printability, amount of content, images, server behaviour, popularity, freshness, meta-tags, analytics, incoming links, social interest, domain age. The software gives a score to each individual micro-dimension. In the final evaluation of this research, the "overall" value was taken into account.

3.3.2 The sample: Movimento Turismo del Vino Marche

The research adopted this model to analyse the website communication of the Marche region's wine industry (Italy). This region displays some of the cultural and production features that are typical of Italy and holds significant, yet-to-be-expressed potentialities.

The wine sector in Italy represents one of the pillars of the national agri-food system and its importance is recognised not only on an economic level but also a cultural one. Indeed, wine, vines and wine-growing territories are defined as "national cultural heritage" in Article 1 of Law No. 238 of 12 December 2016 on the organic discipline of vine cultivation and wine production and trade (referred to as the "T.U. del Vino", the Consolidated Wine Law) (Mancini & Carrega, 2021).

Despite the impact that the COVID-19 pandemic has had on the global economy and markets, the Italian wine sector has maintained and consolidated an international leadership position, both in terms of production (volume and value) and in terms of exports (MarketLine1; Istituto di Servizi per il Mercato Agricolo Alimentare [ISMEA], 2023).

In the Marche region, wine is a key sector in which 1049 companies operate. In 2021, the top 53 companies in the industry recorded € 207 million in sales and an added value per employee of € 70,800. The sector is made up of 55% small enterprises, with sales of less than €1 million, 30% medium-sized enterprises with sales of between €1 million and €5 million, 6% medium-sized enterprises with sales of between € 5 million and €10 million and 9% large enterprises, with sales of more than € 10 million (Iacobucci & Orci, 2023). The sector is therefore characterised by a prevalence of small-sized enterprises that are widespread throughout the region and, in addition, by the coexistence of several designations (controlled designation of origin [DOC], controlled and guaranteed designation of origin [DOCG]) within the same territory. These aspects show that the wine industry is an important sector for the Marche region in terms of its "widespread vocation", with the ability to engage directly with the entire local community (Camera di Commercio delle Marche, 2021). Therefore, the strong link with the terroir and the territory is a competitive advantage that needs to be conveyed through promotional activities that tell the story of the appellations and their local traits.

For the present study, the field research investigated the websites of companies in the Movimento Turismo del Vino Marche[14], which constitutes a significant and valuable sample not only of the sector but also of its tourism capabilities. Movimento Turismo del Vino is a non-profit association founded in 1993, which represents about 1,000 wineries in Italy. Each region has its own branch and wineries are selected according to specific requirements, including, for example, the quality of their wine tourism hospitality. Movimento Turismo del Vino Marche aims to grow the national wine tourism sector, which is a fundamental economic resource for developing territories and an effective tool for protecting the environment. The association's objectives include:

- promoting wine culture through visits to places of production;
- supporting increased tourist flows in all areas of Italy with a strong wine vocation;
- qualifying the tourist services of wine cellars;
- increasing the image and economic and employment prospects of wine territories.

The Marche branch brings together 83 wineries, many of which produce wines with certified origins (DOC and DOCG) and embody the territory.

The wine industry was chosen for our research because wine is a product that is closely tied to the place where it is produced, and its identity is a combination of brand, heritage and terroir. These features constitute a competitive advantage for certain wines and wine regions. Moreover, the aim of the association which brings together the companies chosen for this study is precisely to promote wine tourism in the Marche region. Therefore, a certain type of communication of the milieu and its resources is expected (Harvey *et al.*, 2017).

3.4 Research results

Eighty-two of the eighty-three wineries belonging to Movimento Turismo del Vino Marche have official websites and were analysed (see Tab. 14).

[14] Official website of Movimento Turismo del Vino Marche: https://www.mtvmarche.it/

	2. Content (max. 20)			3. Accessibility (max. 5)					4. Technical aspects (max. 10)	*Tot. (max. 35)*
	2.a (max. 7)	2.b (max. 5)	2.c (max. 8)	3.a (max. 1)	3.b (max. 1)	3.c (max. 1)	3.d (max. 1)	3.e (max. 1)		
Winery 1	2.5	2	3.5	1	0	0.5	1	1	8.6	20.1
Winery 2	0.75	1	0	1	0	0.5	1	1	7.2	12.45
Winery 3	2.5	2	0	1	0	0.5	1	1	7.8	15.8
Winery 4	2	1	3.25	1	0	1	1	1	8	18.5
Winery 5	2.25	1	4.25	1	0	0.5	1	1	8.5	19.5
Winery 6	2.25	2	4	1	0	0.5	1	1	7.5	19.25
Winery 7	2	2	3.25	1	0.5	0.5	1	1	8.7	19.95
Winery 8	1.75	0	2.5	1	0	0.5	1	1	8.5	16.25
Winery 9	1.25	0	1.5	1	0	0	0	1	6.3	11.05
Winery 10	2.75	0	1.5	1	0	0.5	0	1	7.8	14.55
Winery 11	3	1	3.25	1	0	0.5	0	1	7.8	17.55
Winery 12	0	0.5	0	1	0	1	0	0.25	5.2	7.95
Winery 13	0.5	0	1.25	1	0	1	1	0.75	7.5	13
Winery 14	2	0.5	2	1	0	0	0	1	5.4	11.9
Winery 15	2.5	0	1.25	1	0	0.5	0	1	7.5	13.75
Winery 16	3	1	4	1	0	0.5	1	1	7.6	19.1
Winery 17	1	0.5	1.5	1	0	0.5	0	0.75	7.1	12.35
Winery 18	1.25	0	3.5	1	0	0.5	0	1	7.8	15.05
Winery 19	0.75	1	0	1	0	0.5	0	1	8.2	12.45
Winery 20	2.25	1	0	1	0	0.5	0	1	6.8	12.55
Winery 21	4.5	3	3.25	1	0	1	1	1	7.6	22.35
Winery 22	1.75	2	4	1	0	0.5	1	1	7.2	18.45
Winery 23	1.5	0	2.5	1	0	1	1	1	8.3	16.3
Winery 24	3.75	0.5	3	1	0	0.5	1	1	8.6	19.35
Winery 25	0.5	0	1	1	0	0	1	0.75	8	12.25
Winery 26	0.75	0	3	1	0	0.5	1	1	8.1	15.35
Winery 27	1.5	0	1.5	1	0	0.5	1	1	8.2	14.7
Winery 28	1.5	0	0.5	1	0	0.5	1	1	7.6	13.1
Winery 29	2.25	0.5	1.5	1	0	0.5	1	1	8.2	15.95
Winery 30	0.25	0	2	1	0	0.5	1	0.75	7.3	12.8
Winery 31	3.5	1.5	2.75	1	0	0.5	1	1	8.6	19.85
Winery 32	2	1.5	1.5	1	0	0.5	1	1	7.2	15.7
Winery 33	1.75	0	2	1	0	0.5	0	1	8	14.25

Winery 34	3	2	3.25	1	0	1	1	1	7.5	19.75
Winery 35	1.25	0	2	1	0	0.5	0	1	7.4	13.15
Winery 36	0.5	0	0	1	0	0	0	1	7.1	9.6
Winery 37	3.5	0	2.5	1	0	0.5	0	0.75	8	16.25
Winery 38	2.75	1.5	1	1	0	0.5	0	1	8.3	16.05
Winery 39	3.5	0	0.5	1	0	0.5	0	1	8.2	14.2
Winery 40	1	1	0.75	1	0	0	0	0.75	6.3	11.3
Winery 41	6	1	0.5	1	0	0.5	0	1	6.9	16.9
Winery 42	1.5	1	2.5	1	0	1	1	0.75	7.8	16.55
Winery 43	3.5	1	2.5	1	0	0	0	1	8.5	17.5
Winery 44	0.25	1.5	0	1	0	0.5	0	1	7.9	12.15
Winery 45	3.5	1.5	3.25	1	0	0.5	1	1	7.6	18.85
Winery 46	3.25	0	1.75	1	0	0	0	1	7.4	14.4
Winery 47	2.5	0.5	0.5	1	0	0.5	0	1	5.9	11.4
Winery 48	0.75	0	0.5	1	0	1	1	1	8.1	13.35
Winery 49	3.25	2	0.5	1	0	0.5	1	1	8.4	18.15
Winery 50	2	0	2	1	0	1	1	1	8.3	16.3
Winery 51	3.5	1.5	2.5	1	0	1	1	1	7.4	18.9
Winery 52	3.5	1.5	3	1	0	1	1	1	7.9	19.9
Winery 53	0.75	1	1	1	0.5	0.5	1	1	7.6	14.35
Winery 54	1	1.5	1.5	1	0	0.5	1	1	4.4	11.9
Winery 55	0.25	2.5	2	1	0	0.5	0	1	7.3	14.55
Winery 56	0.5	1	3	1	0	0.5	1	1	6.3	14.3
Winery 57	1	0	2.25	1	0	0.5	0	1	8	13.75
Winery 58	1.25	1.5	0	1	0	0.5	0	1	6.9	12.15
Winery 59	0.25	1	0	1	0	0	0	1	8	11.25
Winery 60	2.75	2	3.25	1	0	0.5	0	1	7.5	18
Winery 61	5.5	2	3.25	1	0	0.5	1	1	7.5	21.75
Winery 62	1.25	1	1	1	0	0.5	1	1	8.8	15.55
Winery 63	1.25	1	1	1	0	1	0	0.25	5.4	10.9
Winery 64	2	2	0	1	0	0.5	0	1	6.4	12.9
Winery 65	0.25	1.5	3.25	1	0	0.5	1	1	7.9	16.4
Winery 66	0.25	0	0	1	0	0	0	1	6.8	9.05
Winery 67	0.75	0	3	1	0	0	0	1	6.9	12.65
Winery 68	2.75	0	2.75	1	0	0.5	1	1	7.4	16.4
Winery 69	4	1	1.75	1	0	0.5	1	1	6.9	17.15

Winery 70	1	3	2	1	0	1	1	1	7.7	17.7
Winery 71	2	0	1	1	0	0	0	1	8.7	13.7
Winery 72	2.25	1	2.75	1	0	0.5	0	0.25	6.8	14.55
Winery 73	0.5	2	0	1	0	0.5	0	1	7.4	12.4
Winery 74	0.75	2	0	1	0	0.5	0	0.75	5.5	10.5
Winery 75	2.75	0.5	3	1	0.5	0.5	0	1	8.1	17.35
Winery 76	4	0	1.25	1	0	0.5	1	1	7.3	16.05
Winery 77	2.25	1	2.25	1	0	0	0	1	5.9	14.4
Winery 78	2.5	1	0	1	0	0.5	1	1	7.3	14.3
Winery 79	2	1	0	1	0	0	1	1	6.8	12.8
Winery 80	1.25	0.5	2	1	0	1	1	1	7.6	15.35
Winery 81	1.5	0	1.5	1	0	0.5	0	1	7.7	13.2
Winery 82	1.75	1.5	1.25	1	0	0.5	0	1	6.8	13.8
Average score	**1.96**	**0.90**	**1.76**	**1**	**0.01**	**0.50**	**0.52**	**0.94**	**7.45**	**15.07**
SD	**1.24**	**0.80**	**1.23**	**0**	**0.09**	**0.28**	**0.49**	**0.15**	**0.87**	**3.01**

Tab. 14 – Research results (source: own elaboration)

1. *Corporate data*. The 82 wineries are located in the different provinces of the Marche region, specifically, 7 in the province of Pesaro-Urbino, 45 in the province of Ancona, 17 in the province of Macerata, 5 in the province of Fermo and 8 in the province of Ascoli Piceno. This uneven distribution could be due to two factors:

- The provinces do not have the same number of wineries. 62 wineries (7%) are located in Pesaro-Urbino province, 283 (27%) in Ancona province, 98 (9%) in Macerata province, 74 (7%) in Fermo province, and 522 (50%) in Ascoli Piceno province (Iacobucci & Orci, 2023).
- At the same time, if we look at tourist arrivals and overnight stays, in 2021, the province of Ancona recorded 666,109 arrivals and 2,535,189 overnight stays, while Ascoli Piceno recorded 323,027 arrivals and 1,509,195 overnight stays (Regional Tourism Observatory, 2022).

In light of these data, we can infer that the province of Ancona has more members in Movimento Turismo del Vino Marche because, in addition to having a high number of wineries, it has a stronger tourism vocation.

All of the companies investigated were founded between 1800 and 2018. Most of them (50) were started in the 1900s, followed by those founded in the 2000s (22). In two cases, the foundation date was difficult to trace, whereas the remainder (8) began life before 1900.

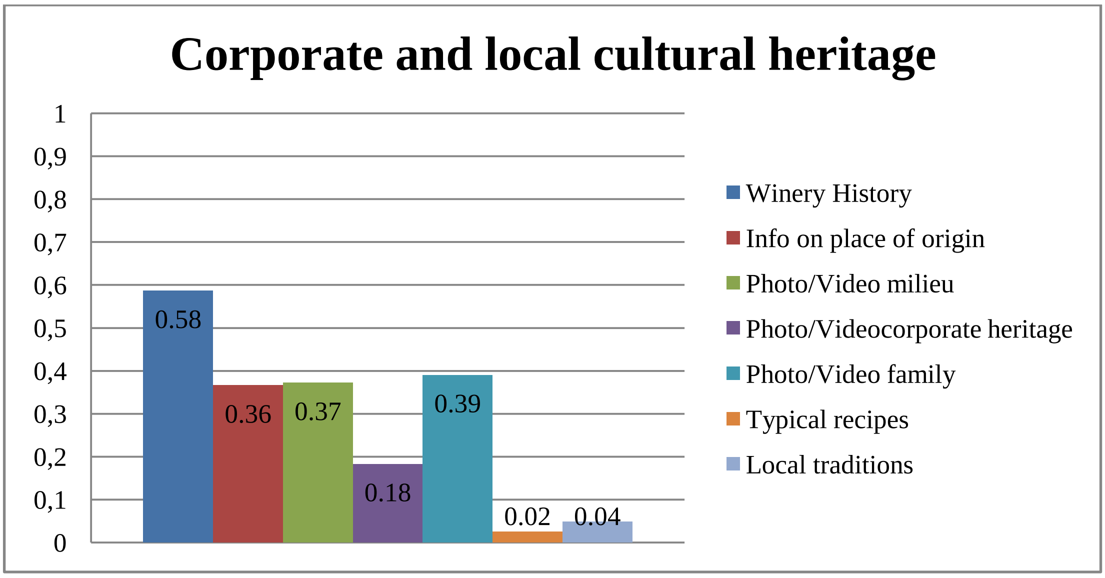
2. *Content*. When it comes to information about corporate and local cultural heritage (a), data analysis shows almost 90% of wineries (73 out of 82) publish at least a concise history of the winery on their websites, but less than 70% (55 out of 82) give information about the place of origin and only 35% (29 out of 82) provide information about and photos of the territory. On the hand, only 2.45% (2 out of 82) give information about local recipes and 4.87% (4 out of 82) about local traditions.

The percentages for branding strategies (b) are lower: 46.34% (38 out of 82) include cultural symbols in the winery’s logotype and/or motto, a little over 20% (17 out of 82) refer to the place of origin in the winery’s name (often the name of the location where the company is based), while 17.07% (14 out of 82) refer to it in the logo. Finally, 13.41% (11 out of 82) provide the foundation year in the logo and only 7.31% (6 out of 82) refer to local cultural symbols in the winery’s name.

Concerning partnerships and services (c), about 56% of the wineries (46 out of 82) give information about visiting cellars or vineyards and specific tours and almost 69% (56 out of 82) provide information about and organise wine tastings. Some (about 30% — 25 out of 82) also have accommodation services. Only a few (about 6% — 5 out of 82) give information about local tourism-related businesses. A very low percentage of wineries (3% — 3 out of 82) provides information on local cultural and tourism associations on their website. The percentage increases (around 19% — 16 out of 82) when considering wineries that provide information on local cultural sites and other attractions in the area.

To get an overview, the average scores for each aspect of the content dimension (corporate and local heritage information, branding, services and partnerships) were calculated.

When looking at the average scores (see Graph 1), it is interesting to note that the score for company history is almost 0.6, while for the place of origin, it is only 0.36.



Graph 1 – Corporate and local cultural heritage: average score (source: own elaboration)

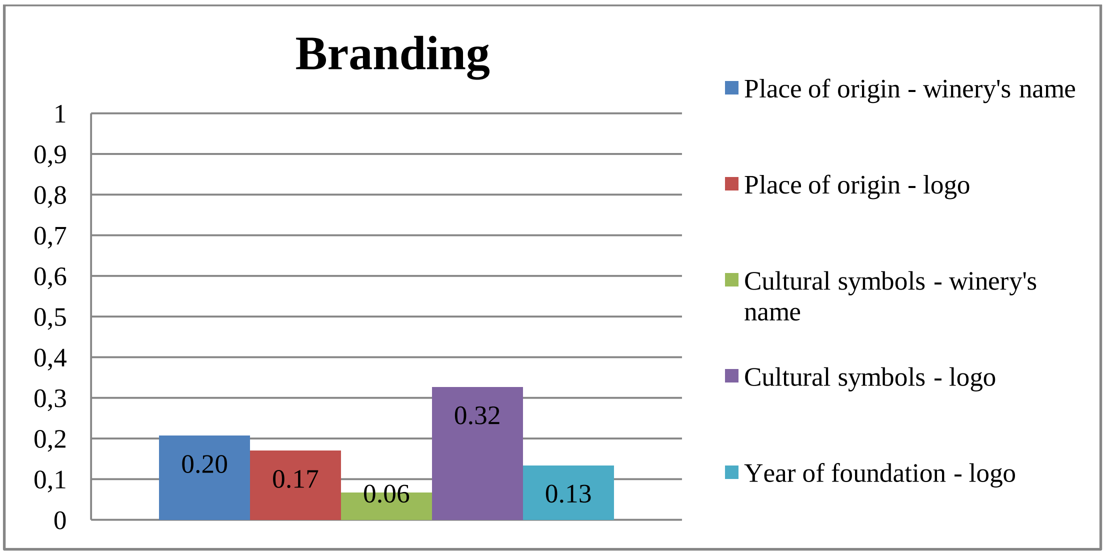
These results mainly suggest two things:

1) there is more awareness around the importance of telling the story of the company (which is often also the story of the family), although there could be more emphasis on this;
2) there is much less awareness about the importance of talking about the milieu, the territory, which, as noted above, can be an identifying and distinguishing factor and, therefore, a competitive advantage for the company.

When we look at images, we see more focus on the family and the environment and much less on corporate heritage. In this case, it should be noted that the scores recorded are very low.

The score for references to local recipes and traditions is also interesting. In this case, the average is really low, 0.02 for local recipes and 0.04 for local traditions. These data show that the milieu and its intangible cultural heritage are not communicated.

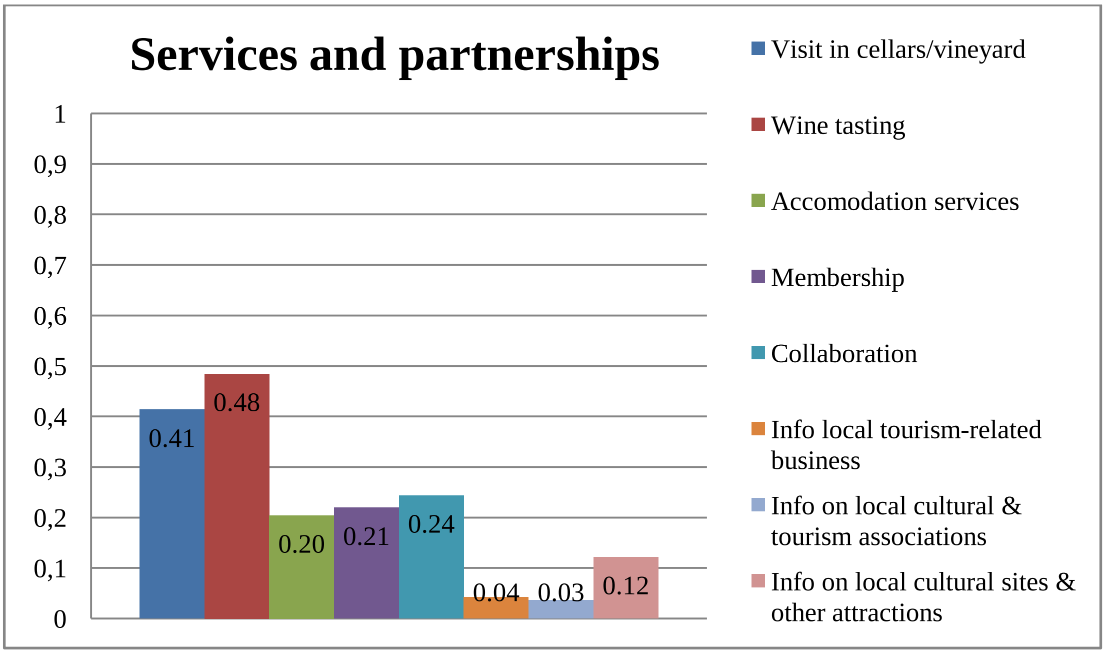
Regarding branding (see Graph 2), the highest average score is for the use of cultural symbols in the logo (0.32).



Graph 2 – Branding: average score (source: own elaboration)

One clarification should be made: coats of arms, especially family coats of arms, but also those of towns and cities, were also considered cultural symbols. In many cases, the connection to the family or the place of origin is made very clear, but sometimes the reason for using these coats of arms is not explained clearly. Regarding the use of the place of origin in the winery name, it is interesting to note that the name of the district or locality where the winery is located is used often. This is followed by the place of origin in the logotype, the year of foundation in the logotype and cultural symbols in the winery name. In general, the average is low for all dimensions of branding. These findings make many of these wineries "brands with a heritage", but not "heritage brands" (Urde*et al.*, 2007). In fact, making heritage part of a brand's value is a strategic decision. This consideration can lead us to interpret the data in different ways: there may be no awareness of the potential of this strategic choice; there may be this type of strategy, but it is not yet well developed; a strategy based on innovation that moves away from the enhancement of the past and heritage might be pursued.

Regarding services and partnerships (see Graph 3), wine tastings and winery visits achieve the highest average scores at 0.48 and 0.41, respectively.

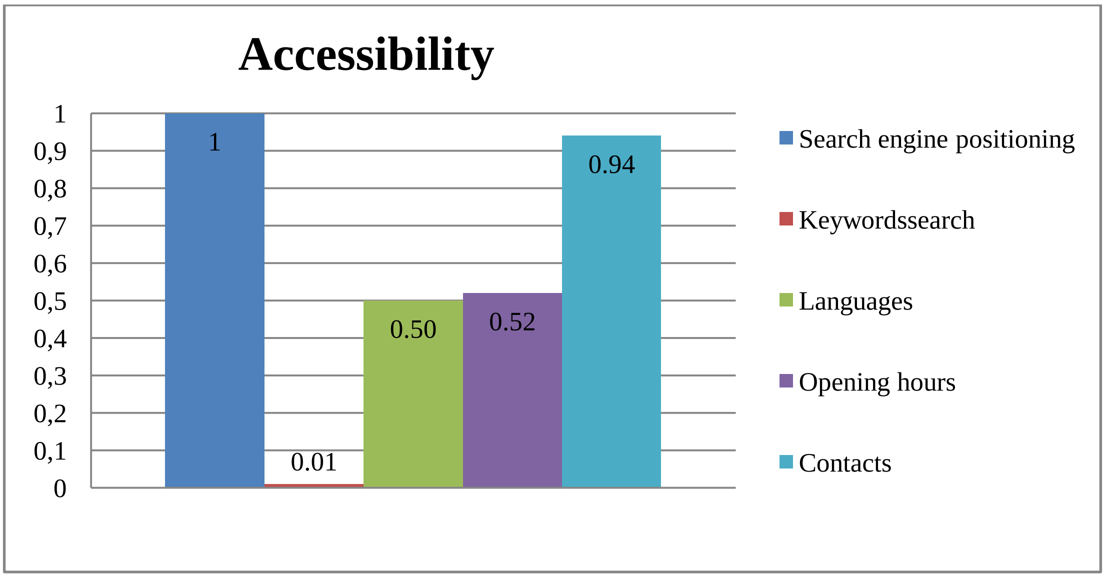


Graph 3 – Services and partnership: average score (source: own elaboration)

Conversely, very low scores are achieved for information on local tourism-related businesses (0.04), cultural and tourism associations (0.03) and local cultural sites and other attractions (0.12). Slightly better are the average scores for information on accommodation services (0.20), memberships (0.21) and collaborations with other local actors (0.24). From these data, it is possible to observe that the activities carried out by the winery itself that could bring in direct income are generally wellcommunicated and valued. The same cannot be said for the communication of activities not directly carried out by the winery, which could bring indirect revenues.

3. *Accessibility*. In the section dedicated to accessibility, the 82 websites achieved overall results ranging from 1.75 to 4. These results are the sum of the various elements considered: positioning in search engines, keyword search, languages, opening hours and contact information. The maximum score is 5.

As in the previous section, the average score (see Graph 4) was also considered to obtain an overall picture.



Graph 4 – Accessibility: average score (source: own elaboration)

All the official websites of the 82 wineries analysed can be found on the first page resulting from a search of their names on Google. On the other hand, when the keywords "Cantine vino Marche PROVINCIA" is entered, only three websites appear on the first three pages of the search engine. Phone numbers, email addresses and social media pages were considered for the contact information dimension. The average score (0.94) is very high, showing good communication of contact information.

Communication of opening hours produces an average score of 0.52, while for language availability it is 0.50. Most of the wine companies (55) provide information in Italian and English, fewer (14) in more than two languages, while the remainder (13) have Italian-only websites.

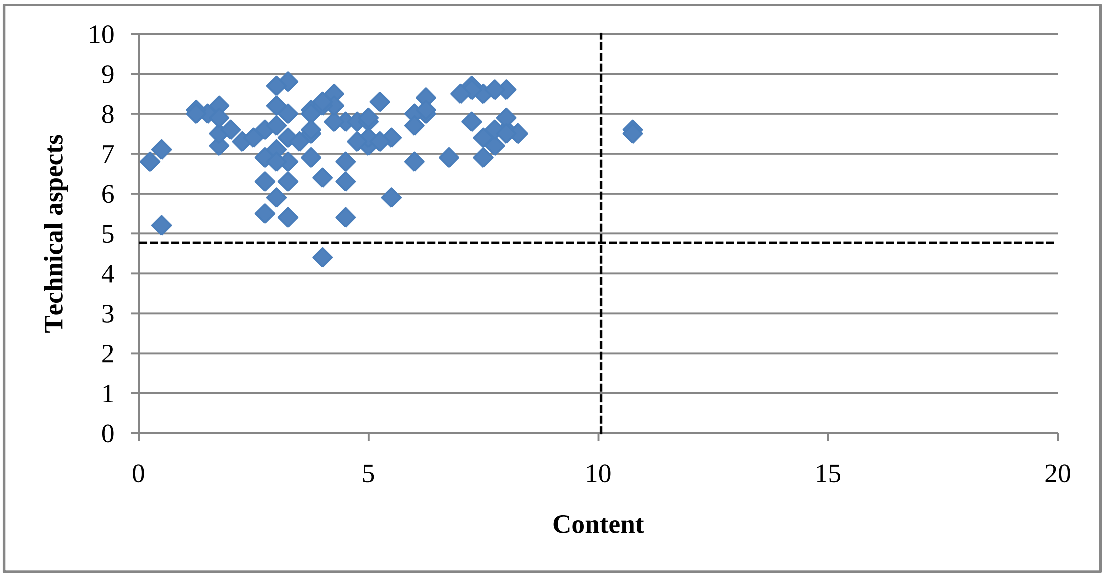
Accessibility, therefore, gets relatively high scores. This may be a symptom of the focus on the accessibility of online and offline services.

4. *Technical aspects*. The technical aspects section records overall values ranging from 4.4 to 8.8 out of 10 (maximum score). The average value for this part is 7.45. Thus, as for the technical aspects, it can be argued that the websites analysed respond positively to the technical needs of the web.

3.5 Discussion

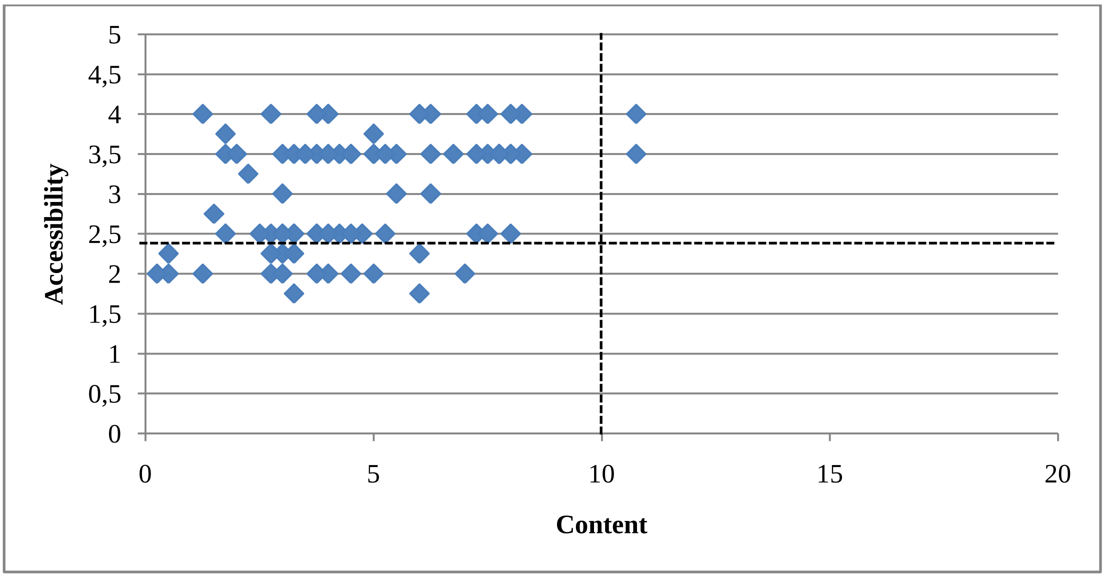
For more insight, some results were cross-referenced and plotted on histograms and scatter diagrams. To assess the quality of communication and enhancement of cultural heritage and milieu on websites, the final results for content were crossreferenced with accessibility and technical aspects.

Regarding content and technical aspects (see Graph 5), the diagram shows that almost all the websites (79) are concentrated in the upper left quadrant. Only two companies score high for both values. Therefore, as a whole, the analysed sample has a good technical rating but scores poorly for content related to corporate heritage, cultural heritage and milieu. It should be highlighted that websites that score high for content communication also have a higher technical quality, which could be a sign of greater marketing awareness.



Graph 4 – Technical aspects &content (source: own elaboration)

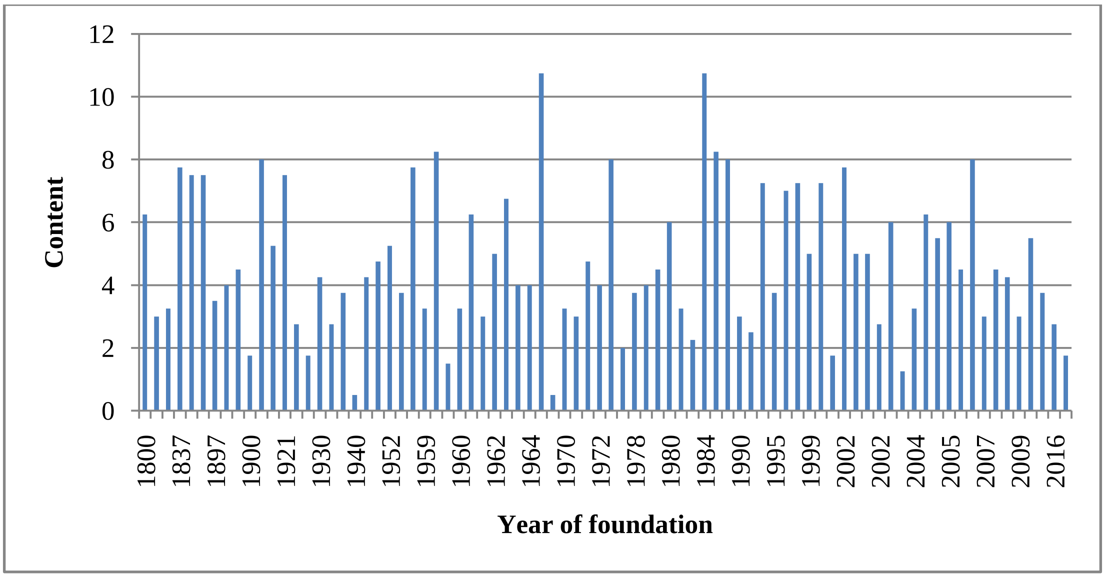
Cross-referencing the results for content and accessibility (see Graph. 6) yields a similar result. Most websites (63) achieve good scores in the accessibility assessment, but very few (2) score high for both values. These two results show certain attention to technical aspects, but the content aspects considered in this research are not central to the online communications strategies of wineries. Thus, the wineries analysed prove to be familiar with the rules of web marketing, but less so with heritage marketing.



Graph 5 – Accessibility & content (source: own elaboration)

In order to assess whether and to what extent wineries currently value and communicate their relationship with cultural heritage and their milieu on their websites, several specific data, mainly from the content section, were cross-analysed.

The first cross data are content results and year of foundation (see Graph 6). This data crossover is useful for understanding whether there is a correlation between the age of a company and the level of communication and enhancement of its heritage and territory. In general, the results obtained from the content section are not very high. Indeed, the average value is 4.62 out of a maximum of 20. In addition, using the formula for correlation, the result is 0.12, which is very close to zero. Thus, we can consider the correlation neutral. Therefore, looking at the data, it is possible to assume that there is no correlation between the foundation date and the higher results in the content section. This could be interpreted as a lack of awareness of the potential of communicating and enhancing corporate heritage, cultural heritage and milieu, even in companies that boast more longevity.

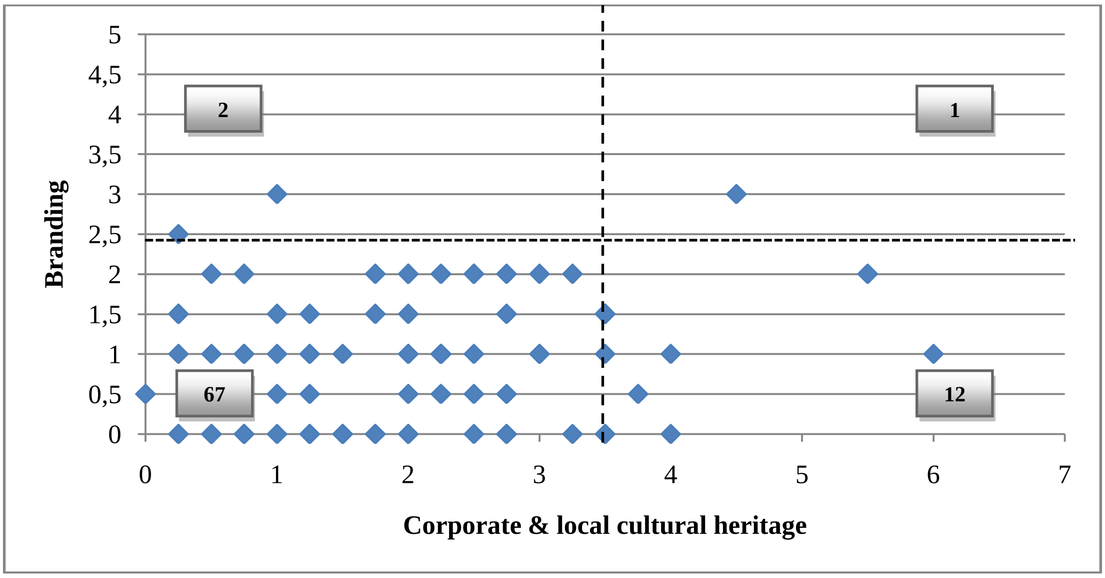


Graph 6 – Content & Year of foundation (source: own elaboration)

After this, the overall results for the three aspects under the content dimensions (corporate and local cultural heritage, branding, services and partnerships) are cross-referenced.

As can be seen in the graphics, when we cross-analysed corporate and local cultural heritage and branding (see Graph 7), corporate and local cultural heritage and services and partnerships (see Graph 8), and branding and services and partnerships (see Graph 9), almost all the websites always have low results in both parameters and are concentrated in the lower left quadrant.

If we examine the graphics more closely, Graph 7 shows that 67 wineries score low in both the corporate and local cultural heritage and branding sections, while 12 wineries score well for corporate and local cultural heritage and poorly for branding.

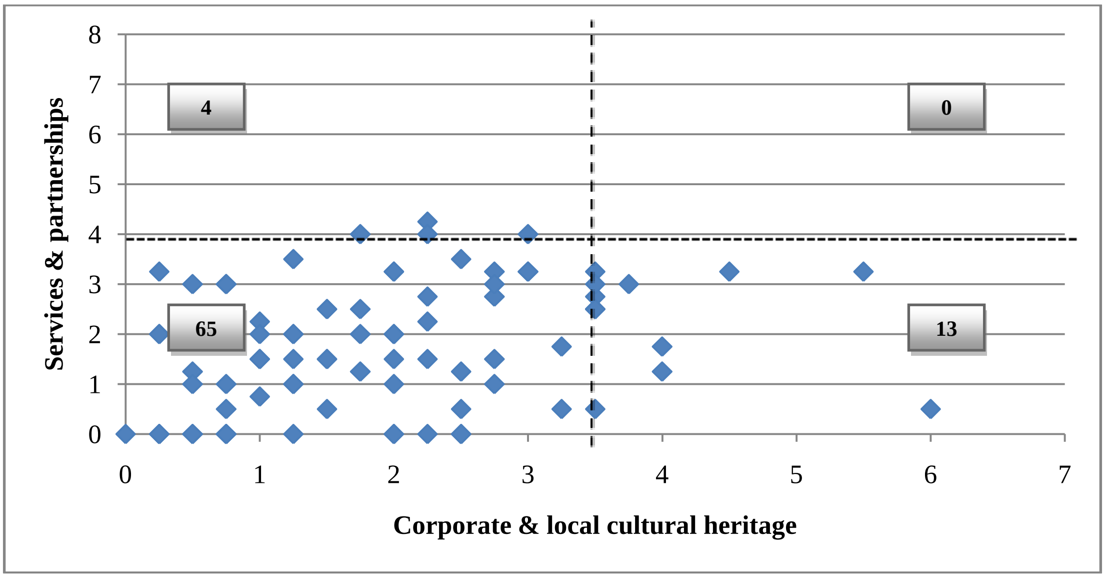


Graph 7 – Corporate and local cultural heritage & Branding (source: own elaboration)

Similar results can be seen in Graph 8, where 65 wineries are in the lower left quadrant and 13 in the lower right part of the graphic. It is interesting to note that the wineries on the right-hand side are mostly in the province of Ancona (10), while two are in the province of Macerata and only one is in the province of Ascoli Piceno. This result suggests that these wineries have a greater awareness of the role of corporate and local cultural heritage, despite the need to improve branding strategies and partnerships. As already mentioned in subsection §4.1, the province of Ancona has more members in Movimento Turismo del Vino Marche, as well as more wineries and a greater vocation for tourism. Moreover, these wineries were founded between 1837 and 1997: all of them have been operating for at least 25 years and some can boast more than 150 years of history.

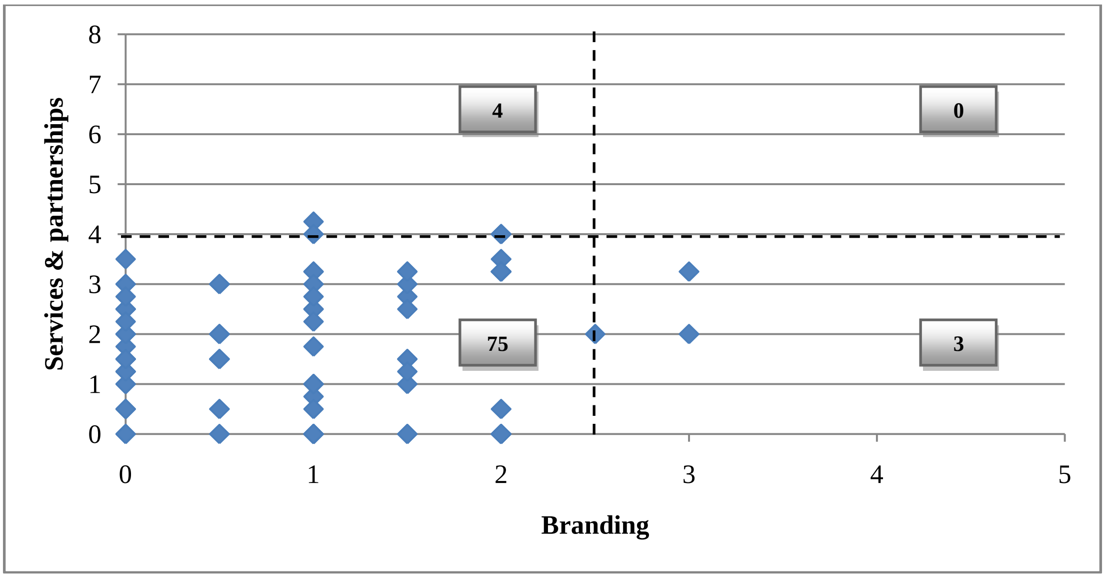
Conversely, young wineries founded from 2000 onwards are on the left-hand side of the graphic. However, in this quadrant, only 22 wineries were founded in the 21st century, while the majority were founded earlier. As previously shown in Graph 6, this confirms that there is no correlation between a company's age and its performance.

The few most virtuous companies are located in different provinces (Ancona and Macerata). One of them was founded in the 1960s and one in the 1980s. These companies obtained a total score of 10.75 for content and scored highest in the corporate and local cultural heritage sections. Both devote a special section to the history of the company, accompanying the text with pictures of the family or the historical building that houses it. Similarly, information on the surrounding area is provided, with one of the wineries dedicating a specific section to possible destinations to visit in the region. A certain attention to history, tangible and intangible heritage and the place where these wineries operate shine through from their websites, where their ties to local history, culture and tradition are spotlighted. However, one consideration should be made: the most virtuous ones scored 10.75 out of a maximum of 20. This means that, to date, no special attention has been placed on communicating their relationship with their milieu and cultural heritage via their corporate websites.



Graph 8 – Corporate and local cultural heritage & Services and partnerships (source: own elaboration)

In Graph 9, 75 wineries are in the lower left quadrant. No winery has good results for both dimensions. This result confirms very little attention to branding and services and partnerships, thus considerable room for improvement.



Graph 9 – Branding & Services and partnerships (source: own elaboration)

In conclusion, cross-data results, combined with the average scores illustrated above, indicate poor communication of corporate heritage, local cultural heritage and milieu. Companies do not communicate these aspects on their websites, even those with a long history, thus revealing a lack of attention and awareness of the importance of attributes which, as argued by Montella (2009), have the ability to qualify products in the glocal context.

As seen in subsection § 3.2.2, websites should play a key role in promoting brands and wine tourism destinations, particularly in the wine and food sector. However, the data analysis shows that, although the wineries whose websites were analysed are part of an association whose very aim is to promote wine tourism, there is little information on tourism-related activities and the milieu in general on these sites.

3.6 Conclusions

This exploratory study analysed 82 websites of wineries differentially located across the Marche region and founded at different times. As members of the association Movimento Turismo del Vino Marche, the investigated wineries were expected to communicate their respective milieus and their resources on their official websites.

Several interesting insights can be drawn from an analysis of the results for the content section. The three aspects considered (information on corporate and local cultural heritage, branding, services and partnerships) registered low average scores. The scores for accessibility and technical aspects were higher. When we consider the average scores and cross-reference the data, it emerges that, to date, even the wineries performing well from a technical point of view do not sufficiently communicate the link between their corporate heritage, cultural heritage and, in general, their territory. Thus, their relationship with their milieu and cultural heritage is not communicated and emphasised in a meaningful way in website communications, not even by those wineries that can boast a history spanning several decades. Therefore, the role of the milieu in online corporate communications still has unexpressed potential.

The research results confirm the difficulties many small wineries face due to budget restrictions on marketing and advertising, and a lack of skilled human resources (Yuan *et al.*, 2004). We can also state that websites do not meet the needs of visitors looking for the total wine tourism experience (Yuan *et al.*, 2004, p. 23). As emerged in previous studies, scant information is offered about activities related to wine tourism that would attract tourists and this limitation "does not seem to be remedied by the development of business networks in the area. Consequently, very few websites offer tourism information about the region where they are located" (Marzo-Navarro & Pedraja-Iglesias, 2021, p. 534).

Poor communication of corporate heritage, local cultural heritage and milieu may be symptomatic of a lack of awareness about the relevance of these aspects in marketing strategies and their "production value". In addition, behind these limitations, there may also be a lack of awareness about the role of websites as a marketing tool. Given the strong historical and cultural relationship between local food and wine production and milieu, it is clear that there is considerable room for improvement. Wineries should invest in their digital marketing strategies and positioning in the global market by leveraging their link with the milieu in which they operate.

The communication gap that emerged from the research could be filled with training courses, specific events and workshops on heritage marketing aimed at bringing awareness to the sector around the potential of this strategy and the tools that can be used to implement it. It might be opportune to present best practices, including international ones, to provide concrete examples of what can be done and the results that can be achieved from heritage marketing. In addition, wineries should increase their collaboration with the territory, public actors and entrepreneurs to spread knowledge about the milieu and the company's reputation and trigger a virtuous circle for all the local actors.

The research analysed the wine sector in the Marche region, but the evaluation model and the managerial implications could be applied to all companies in the agri-food sector and, more generally, in the Made-in sector.

This research provides a framework for the current communication and enhancement of the milieu on winery websites. Future longitudinal research can analyse the evolution of the heritage marketing approach. The limitation of the research is that the reasons for this lack were not investigated. Therefore, further developments could come from qualitative research to better understand the level of awareness about the importance of milieu in corporate communication strategies.

4. Enhancing Intangible Cultural Heritage for Sustainable Tourism Development in Rural Areas.

The Case of the "Marche Food and Wine Memories" Project (Italy)

4.1 Introduction

The European Union's long-term vision for rural areas up to 2040 highlights their potential and importance for European identity. They are rich in environmental and cultural resources and can attract a new and increasing, but still unmet, demand for culture from those seeking a broad and deep experience of place-specific resources, such as crafts and gastronomy, traditional knowledge and practices[15]. However, in the current context, rural areas are also experiencing population decline, an ageing population, economic decline, difficulty accessing health and education services and limited digital connectivity (Cerquetti & Cutrini, 2021). As already highlighted by UNESCO[16], intangible cultural heritage (ICH) could be a powerful lever for promoting sustainable development in these areas. On the one hand, it can attract tourists at national, regional and international levels and boost local businesses (economic sustainability); on the other, it contributes to well-being and quality of life and can strengthen social cohesion and inclusion (social sustainability). Moreover, it helps protect biodiversity and enhance environment-friendly local knowledge and practices, e.g., the sustainable use of natural resources (environmental sustainability). Finally, it contributes to knowledge sharing and increases human capital (cultural sustainability) (Soini & Dessein, 2016). However, this topic has not been specifically analysed in the scientific literature on sustainable tourism development in rural areas.

In this context, the present research discusses the contribution of rural heritage to the four dimensions of sustainability for tourism development in rural areas. Adopting a case study methodology (Stake, 2008; Yin, 2018), we investigated the "Marche Food and Wine Memories" project, an initiative promoted by CiùCiù, a winery based in Offida, a small village in the Marche region (Italy). The project aims to safeguard and enhance the rural cultural heritage related to food and wine in the southern Marche region by collecting the oral memories of the last witnesses of mezzadria (sharecropping). The project also adopts storytelling methods and includes guided and gamified tours around sharecropping houses where the collected stories are presented to visitors.

After discussing strategies and tools adopted to enhance rural heritage, our analysis focused on the involvement of local communities and businesses in the different phases of the project. The literature review on the role of tourism and cultural heritage in sustainable development in rural areas allowed us to build a conceptual framework that guided and structured the analysis of the case study. The research aimed to understand:

- The project's current contribution to the economic, social, cultural and environmental dimensions of sustainability;
- Its strengths and weaknesses and possible future improvements.

The research findings confirm the high potentialities of ICH-based initiatives for the sustainable tourism development of rural areas, but also reveal the need to improve the level of

[15] European Commission - Transition Pathway for Tourism:https://op.europa.eu/en/publication-detail/-/publication/404a8144-8892-11ec-8c40-01aa75ed71a1

[16] UNESCO Intangible Cultural Heritage and Sustainable Development: https://ich.unesco.org/doc/src/34299- EN.pdf

networking with local businesses. Moreover, they highlight gaps in the marketing and management skills needed to ensure long-term sustainable development. Finally, the results provide policy and managerial implications for similar ICH-based initiatives.

The paper is structured as follows: Section 4.2 presents the theoretical background through a critical discussion of the scientific literature on the role of tourism and cultural heritage in promoting sustainable development in rural areas. Section 4.3 presents the research methodology and Section 4.4 the research results; and Section 4.5 discusses the main findings and their impact on museum management. Conclusions are drawn in Section 4.6, which point out the policy and managerial implications, research limitations and suggest further research.

4.2 Theoretical Background

4.2.1 Sustainability and Tourism Development

Meeting "the needs of the present without compromising the ability of future generations to meet their own needs" (Brundtland, 1987) is still one of the most urgent challenges contemporary society faces when looking for common solutions to the planet's biggest problems.

In view of its considerable role in generating prosperity, improving livelihoods and preserving the environment, tourism is in a special position to drive sustainable development (UNWTO, 2018). First, thanks to its dynamic nature and impact on the economies of many countries and destinations, it can be a driver of economic development at local, regional and national levels (Telfer & Sharpley, 2015). Moreover, thanks to the interaction between tourists, local communities and local environments, it can be a source of knowledge and awareness and make visitors and hosts more conscious of environmental issues and the differences between nations and cultures (UNEP, UNWTO, 2005).

At the global level, this crucial role is also confirmed by the recurring reference to tourism in key United Nations (UN) documents on sustainable development, such as The Future We Want (UN, 2012), the Addis Ababa Action Agenda on Financing for Development (UN, 2015a) and the 2030 Agenda for Sustainable Development (UN, 2015b). The last of these committed all countries to pursue a set of 17 Sustainable Development Goals (SDGs) that would lead to a better future.

In the UN 2030 Agenda framework, tourism has been accorded a transversal function since it indirectly contributes to achieving all SDGs and is included as a specific target in three of them. First, tourism is recognised as one of the driving forces of global economic growth (SDG 8) since it currently accounts for 1 in 11 jobs worldwide. In addition, when giving access to decent work opportunities in the tourism sector, society can benefit from increased skills and professional development. Consequently, by 2030, specific policies are to be implemented that will promote sustainable tourism, create jobs and promote local culture and products. Second, tourism can act as a lever to promote sustainable consumption and production (SDG 12). Third, tourism should stimulate the sustainable use of marine resources and serve as a vehicle to promote the blue economy by supporting the conservation and preservation of fragile marine ecosystems (SDG 14).

In this context, the UN General Assembly's designation of 2017 as the International Year of Sustainable Tourism for Development established another milestone by setting the scene for a stronger awareness among public and private sector decision-makers and the public about sustainable tourism's contribution to development (UNWTO, 2017). Along this journey, Tourism and the Sustainable Development Goals. Journey to 2030, the book published by the UN World Tourism Organization (UNWTO) and the UN Development Programme (UNDP), clarified the links between tourism and the SDGs, and provided policy recommendations to accelerate the shift towards a more sustainable tourism sector by aligning policies, business operations and investments with the SDGs and making tourism a catalyst for positive change (UNWTO & UNDP, 2018).

The relationship between tourism and sustainable development can be both positive and negative. On the one hand, tourism can be a source of opportunities in terms of entrepreneurship (Subramaniam & Masron, 2022), employability (Vicente *et al.*, 2021) and attracting investments. It can also create tangible economic value for natural and cultural resources and therefore bring general economic growth (Nunkoo *et al.*, 2020; Peña-Sánchez*et al.*, 2020). From a social perspective, tourism benefits are also related to community pride, tolerance and a stronger sense of ethnic identity (Besculides *et al.*, 2002; Lee, 2013; Nicolaides, 2020). On the other hand, tourism can contribute to the erosion of scarce resources and local and global pollution, and can compromise fragile ecosystems causing the degradation of the physical environment and bringing disruption to wildlife (Sunlu, 2003). Tourism can also exert negative pressures on host communities (Brunt & Courtney, 1999; Fredline & Faulkner, 2003; Dyer *et al.*, 2007). Finally, it can be an unstable source of income, as it is often susceptible to actual or perceived changes in the environmental and social conditions of destinations (UNEP & UNWTO, 2005).

In this perspective, sustainable tourism, as a form of tourism addressing the needs of visitors, the tourism industry, the environment and host communities, is expected to create a balance among environmental, economic and socio-cultural impacts. Several actions should be implemented, such as promoting the optimal use of environmental resources, respecting the authenticity of places and local communities, supporting the conservation of cultural heritage and traditional values, as well as ensuring long-term economic operations, including stable employment, income-earning opportunities and social services[17]. In this perspective, the United Nations Environment Programme (UNEP) and the World Tourism Organization (UNWTO) released an Agenda for Sustainable Tourism (UNEP & UNWTO, 2005), consisting of a set of 12 specific and interrelated aims addressing the economic, social and environmental impacts of tourism (see Tab. 15). The agenda provides a framework for developing policies for more sustainable tourism, minimising the negative effects of tourism on society and the environment and maximising tourism's positive and creative contribution to local economies, the conservation of natural and cultural heritage and quality of life for hosts and visitors.

[17] UNWTO. Sustainable Tourism Development: https://www.unwto.org/sustainable-development

Aim	Definition
Economic viability	Ensuring the viability and competitiveness of tourism destinations and enterprises.
Local prosperity	Maximizing the contribution of tourism to the economic prosperity of the host destination.
Employment quality	Strengthening the number and quality of local jobs created and supported by tourism.
Social equity	Seeking a widespread and fair distribution of economic and social benefits from tourism throughout the recipient community.
Visitor fulfilment	Providing a safe, satisfying and fulfilling experience for visitors without any discrimination.
Local control	Engaging and empowering local communities in planning and decision-making about the management and future development of tourism in their area.
Community well-being	Maintaining and strengthening the quality of life in local communities, avoiding any form of social degradation or exploitation.
Cultural richness	Respecting and enhancing the historic heritage, authentic culture, traditions and distinctiveness of host communities.
Physical integrity	Maintaining and enhancing the quality of landscapes, avoiding the physical and visual degradation of the environment.
Biological diversity	Supporting the conservation of natural areas, habitats and wildlife, and minimizing damage to them.
Resource efficiency	Minimizing the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.
Environmental purity	Minimizing the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

Tab. 15 – The twelve aims for an Agenda for Sustainable Tourism (Source: UNEP, UNWTO, 2005 pp. 18–19)

4.2.2 Sustainable Tourism Development in Rural Areas

Achieving sustainable development depends on an area’s territorial, economic and social idiosyncrasies. The implications can differ between populated and developed urban areas, and marginal and disadvantaged areas. To this aim, in recent years, European regional policies and structural funds have focused on the need to identify new innovation-driven models to promote regional development and economic growth and reduce territorial imbalances in different areas (Antonescu, 2020; European Commision, 2011).

These challenges are considerable in rural areas. These portions of territory are affected by weakening agricultural or soft industrial activities, a lack of services, low living standards and out-migration (Dijkstra & Poelman, 2014). However, they can also rely on place-specific tangible and intangible cultural resources and meet post-modern tourist needs, such as the quest for authenticity and revival of cultural roots through experience-based interactions with local culture and immersion in the everyday local life (Gilmore & Pine, 2007; Beverland & Farrelly, 2010).

The concept of authenticity in tourism was introduced many decades ago by MacCannell (1973) and has increasingly become a crucial topic for scholars, who have focused on many aspects (Wang,1999; Chhabra *et al.*, 2003; Wang, 2017), including the risks related to ambiguity and limited authenticity in tourism (Stephen, 1990; Urry, 1992). More recently, some researchers have highlighted the existence of a positive connection between the perception of a place’s authenticity, attachment to a place and defining a feeling of loyalty for a destination (Yu *et al.*, 2017; Cong *et al.*, 2022). In this perspective, rural tourism—defined as “a type of tourism activity in which the visitor’s experience is related to a wide range of products generally linked to nature-based activities, agriculture, rural lifestyle/culture, angling and sightseeing"[18] — may be a source of development for rural areas and provide authentic experiences for tourists.

Indeed, this form of tourism can be an additional economic activity whereby rural areas no longer have to depend entirely on primary activities such as agriculture and livestock (López-Sanz *et al.*, 2021). Moreover, this form of tourism could play a crucial role in sustainable development (Hall & Boyd, 2005) and act as a significant factor in socio-economic development and regeneration (Ibănescu *et al*., 2018). Specifically, by supporting the protection of local natural and cultural capital and by using it sustainably, rural tourism can establish a balance between the economic and ecological dimensions of development and achieve economic, environmental and socio-cultural growth (Mahmoudi *et al.*, 2011; Vitasurya, 2016; Curcic *et al.*, 2021).

The scientific literature review on the topic identifies several positive and negative externalities of tourism in rural areas. First, many scholars focus on the nature of rural tourism as a vehicle for the economic development of rural areas, in terms of economic growth and diversification (Roberts & Hall, 2001; Sharpley, 2002), but also as a driver for agricultural development (Roberts *et al.*, 2017) and a stimulus for the creation or growth of new local enterprises (ILO, 2019). Some authors also highlight the influence of rural tourism in reducing outgoing migration (Androshchuk & Chernenko, 2016) and dealing with the challenge of depopulation (Müller & Jansson, 2007) through a mechanism of population retention (Chhabra *et al.*, 2003). Indeed, studies show how tourism activities can help increase revenues, employability and job creation, and modernise facilities (Müller & Jansson, 2007; Chang, 2011; Tangit *et al.*, 2014). When considering the social dimension of tourism for sustainable development in rural areas, some studies stress the capacity of this type of tourism to improve socio-economic well-being (Muresan *et al.*, 2016; Park & Yoon, 2011) and the overall quality of life of residents (Woo*et al.*, 2015; Lin*et al.*, 2017). Other studies demonstrate that rural tourism can bring tangible economic value to natural and cultural resources, encouraging residents to preserve local heritage through specific actions, thus increasing a local sense of pride and belonging (Tangit *et al.*, 2014) and the quality of the tourist experience (Bramwell & Lane, 1993; Stabler, 1997; Park *et al.*, 2008).

Focusing on the negative impact of tourism activities on rural areas, scholars point out the inability of rural tourism to make a significant contribution in terms of new jobs and increasing the quality of life of local people (Eusébio *et al.*, 2014). In some cases, there are also negative environmental and socio-cultural consequences, such as the destruction of natural resources (e.g., local vegetation and landscape), the loss of traditional culture, the rise of social conflicts between hosts and guests (Bahrami & Noori, 2013) and a failure to involve local communities in the planning process (Almeida-García *et al.*, 2016). When investigating the economic impact, the literature also shows the risks of an unbalanced distribution of economic benefits and higher prices for certain goods and services (Rye & Gunnerud Berg, 2011).

In this context, measuring the impact of tourism is essential for preventing conflicts between tourism and sustainability and for making tourism an effective tool for the development of rural areas (UNWTO, 2020).

4.2.3 The Role of Cultural Heritage for Sustainable Development

Over the last fifteen years, the international framework provided by the Council of Europe Convention on the Value of Cultural Heritage for Society, signed in Faro in 2005 (Italy signed the

[18] UNWTO – Rural tourism: https://www.unwto.org/rural-tourism

Faro Convention on 27 February 2013 and ratified it on 15 December 2020. The Convention entered into force on 1 April 2021), has significantly broadened the concept of cultural heritage, opening new opportunities for its use and contribution to sustainable development.

The Faro Convention finally recognised the open, relational and dynamic nature of cultural heritage as the product of the continuous and changing interaction between people and places: not only heritage-as-object, but also heritage-as-process (Fairclough, 2009). Furthermore, according to the Convention, cultural heritage can be considered a two-faced Janus; that is, both a source and a resource. On the one hand, it is evidence of the past and documents the origins of Europe, “a shared source of remembrance, understanding, identity, cohesion and creativity” (Article 3(a)). On the other, it is a resource from which we can draw cultural, social and economic benefits for the future (Preamble; Article 2(a); Article 7(c)) and sustainable development (Articles 1, 3 and 5). From previous research on cultural heritage (Loulanski, 2006; Montella, 2016), we can summarise the paradigm shift introduced by the Faro Convention as a complete and profound reversal: of authority (from top to bottom), of the object (from the exceptional to everything), of value (from the value itself to use-value) and, therefore, of purpose (from “museification” to enhancement) (Cerquetti & Romagnoli, 2022).

When analysing the value of cultural heritage, Montella (2009) identified three different types of use-value that can be drawn from cultural heritage: presentation value, as an information-based value, corresponding to the communication of the meanings of cultural heritage, i.e., authentic, aesthetic, symbolic, social, historical and documentary value (Throsby, 2001); landscape value, as a systemic value concerning the safeguard of the environment and territory through environmental policies and city planning (Golinelli, 2015); production value, referring to market uses flowing from cultural heritage and profit for businesses operating in different sectors, e.g., restoration, publishing, tourism, construction, real estate business, performing arts, etc. (Greffe, 2009). If cultural heritage is stratified through time in a specific context, it can influence a firm’s value creation and competitive advantage.

As shown in Fig. 20, these three values are intrinsically connected to sustainability. Presentation value targets cultural sustainability, while landscape value can generateboth environmental sustainability, in terms of environment and landscape quality, and social sustainability, by improving quality of life. Finally, production value contributes to economic sustainability. Thus, the proper use of cultural heritage can trigger a virtuous sustainable cycle. Increasing numbers of citizens with a better understanding of cultural heritage and its environment (cultural sustainability) “leads to people valuing it more and as a consequence caring for it better” (Thurley, 2005), thus improving the environment and landscape quality (environmental sustainability) and promoting quality of life and well-being (social sustainability) (Cerquetti & Ferrara). Moreover, the enhancement of cultural heritage can create job opportunities and attract tourists, making it a source of income for the cultural and creative industries, the tourism and hospitality sectors, etc. (economic sustainability).

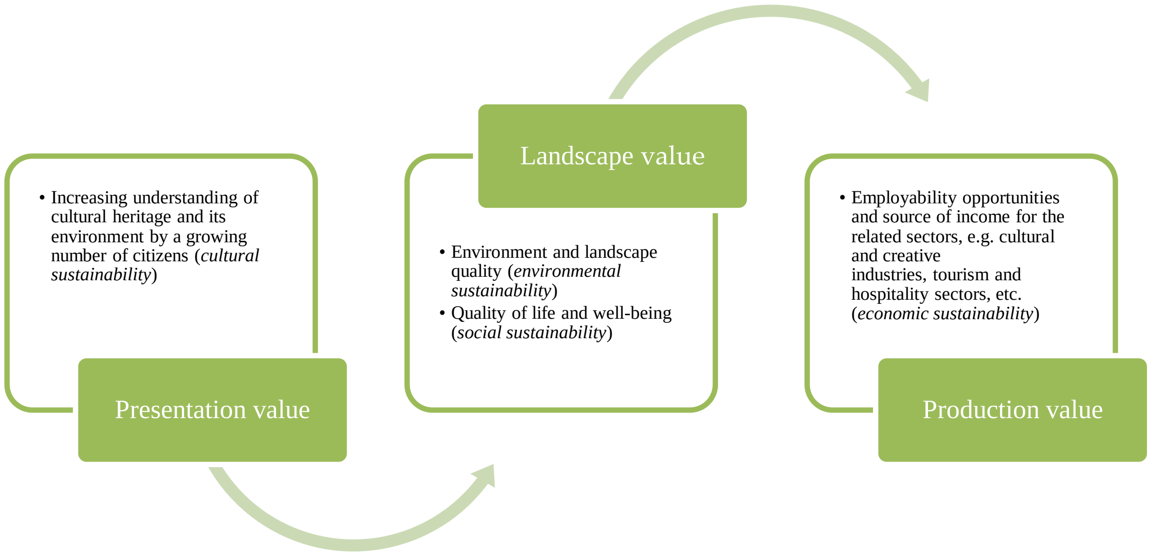


Fig. 20 – Cultural heritage value and sustainable development (source: own elaboration).

This virtuous cycle is particularly effective in rural areas, where heritage-based tourism can play a crucial role in counteracting population and economic decline and the abandonment and disappearance of cultural heritage. Indeed, considering its connections with the productive vocation of the territory and its potential as an authentic local asset, cultural heritage can contribute to the attractiveness and distinctiveness of a rural destination (Richards, 2010). Specifically, intangible cultural heritage (ICH), including all practices, traditions and knowledge that a community considers part of its cultural heritage (UNESCO, 2003), can crucially contribute to increase awareness of local cultural specificity (Lonardi & Unterpertinger, 2022) and allow a rural destination to better meet the experience needs of tourists.

These assumptions become more relevant in the scenarios defined by the COVID-19 pandemic, which had a devastating and disruptive effect on travel and tourism, as well as on the hospitality-, arts- and events-affiliated sectors (Higgins-Desbiolles, 2020). Indeed, destination crisis events have negative impacts on tourists' emotions, attitudes and behaviours and thus influence sustainable tourism development (Su *et al.*, 2022; Su *et al.*, 2023). Nevertheless, although the COVID-19 epidemic over the last two years has prevented tourists from travelling, tourists still expect to experience pure, authentic and unrestricted tourist destinations (Cong *et al.*, 2022). In this perspective, rural areas, providing authentic, uncrowded and in-touch-with-nature touristic experiences, have been discovered as one of the most promising places for the development of domestic tourism (WTTC, 2022), but also as a key element for "revenge tourism", providing a chance for a degrowth-oriented restart that forms the foundation for a more sustainable tourism sector (Panzer-Krause, 2022).

Many possible benefits can be identified, while taking into account the analysis carried out in Section § 2.1 (see Tab. 16).

ECONOMIC SUSTAINABILITY (Schubert *et al.*, 2011; Belletti & Berti, 2011; Agyeiwaah *et al.*, 2017; Andrade-Suárez, & Caamaño-Franco, 2020; Streimikiene *et al.*, 2020)
1. Source of income for tourism and hospitality sectors. 2. Source of income for tourism and hospitality-related sectors. 3. Encouragement for local entrepreneurship. 4. Source of attraction of external investments. 5. Employability opportunities for residents.
SOCIAL SUSTAINABILITY (Franzoni, 2015; Agyeiwaah*et al.*, 2017; Aghazamani & Hunt, 2017; Khalid *et al.*, 2019; Andrade-Suárez, & Caamaño-Franco, 2020; Streimikiene *et al.*, 2020)
1. Enhancement of quality of life. 2. Stimulus for sociability and intergenerational dialogue. 3. Local empowerment through involvement of communities. 4. Stimulus for networking among local communities, companies, and institutions. 5. Compatibility of tourism activities with the life of local people.
CULTURAL SUSTAINABILITY (Agyeiwaah*et al.*, 2017; Andrade-Suárez, & Caamaño-Franco, 2020; Streimikiee *et al.*, 2020; Loulanski & Loulanski, 2011)
1. Enhancement of the history and culture of the territory. 2. Development, improvement and enhancement of the territory's image. 3. Stimulus for cultural exchange. 4. Boosting the offer of cultural and recreational activities. 5. Increasement of sense of pride and belonging among residents.
ENVIRONMENTAL SUSTAINABILITY (Agyeiwaah *et al.*, 2017; Andrade-Suárez, & Caamaño-Franco, 2020; Streimikiene *et al.*, 2020)
1. Contribution to the maintenance of natural resources and the local ecosystem. 2. Stimulus to the increase of awareness about environmental values among both local communities and tourists. 3. Raising awareness and educating local entrepreneurs on ecological transition issues. 4. Awareness of environmental issues in the upkeep and restoration of the historic and cultural heritage. 5. Involvement of local communities in activities related to the environmental recovery and revitalization of the rural heritage and its setting for tourism usage.

Tab. 16 – The four dimensions of sustainability in heritage-based tourism in rural areas (source: own elaboration)

4.3 Materials and Methods

Within the theoretical framework provided by the scientific literature on the topic (§4.2), the research aimed to understand the contribution of rural heritage to the four dimensions of sustainability (economic, social, environmental and cultural) for tourism development in rural areas.

In order to answer the research questions identified in Section § 4.1, a qualitative approach was adopted. This methodology allows the investigation of the dynamics of a specific phenomenon in an open and in-depth manner and is often considered best suited to answer exploratory research questions and to capture the complexity of a phenomenon (Denzin *et al.*, 2006; Creswell, 2009; Patton, 2014).

Specifically, the research adopted an exploratory single case study (Tellis, 1997; Stake, 2016; Yin, 2018). This methodology allows a holistic and detailed analysis of the case study embedded in its context and with which it interacts. It helps broaden knowledge of the phenomenon by gathering information about particularly interesting variables from various sources (Yin, 2002).

The chosen case study was considered particularly significant for our research questions as it enhances rural and place-specific cultural heritage, opening up potential opportunities for sustainable tourism development. Therefore, it is an interesting example of how rural heritage contributes to sustainable tourism development.

4.3.1 Motivations and Objectives of the "Marche Food and Wine Memories" Project

"Marche Food and Wine Memories" is a project promoted by the CiùCiù winery, conceived and implemented by the start-up i-strategies, both based in Offida, a small village in the Marche region (Italy). As one of the winery's owners stated, the project stems from the desire to save intangible cultural heritage that is part of the company's family and territory. The company was founded in 1970 by a former sharecropper who decided to buy the land he had, until then, cultivated for a landowner. "The project also arises from the desire to create added value for our brand and products by rediscovering the food and wine roots of our territory" (KI 1). Thus, the project aims to safeguard and enhance the rural cultural heritage linked to food and wine in the southern Marche region by collecting the oral memories of the last witnesses of sharecropping, considered a distinctive aspect of local culture and regional identity.

The Italian word *mezzadria* (sharecropping) derives from the Latin "to divide into two halves" and refers to the principle whereby the landowner and the sharecropper family share the produce of the land in two equal portions.

Sharecropping was a rural system that characterised central Italy for centuries. The sharecropping system originated in Tuscany in the 9th century, but began to spread between the 14th and 15th centuries. Although it also reached the United States and France, its greatest penetration was in central Italy, where it survived for over five centuries. Indeed, sharecropping ended between the 1960s and 1970s, due to industrial development and the consequent exodus from the countryside. In the Marche region, it stopped even later, in the 1970s and 1980s (Anselmi, 1995; Passaniti, 2017).

The long history of this rural system has left an important legacy in the Marche region in both tangible and intangible cultural heritage. For example, the former is represented by the rural landscape and characteristic farmhouses, while the latter is found in the work ethic, crafts and folklore of the region's inhabitants and, last but not least, in the food and wine.

The “Marche Food and Wine Memories” project has four related objectives (see Fig. 21):

1. To create an archive of the oral memories of former sharecroppers as an essential part of the intangible cultural heritage of the Marche region. For this purpose, former sharecroppers were interviewed to collect and preserve their memories.
2. To save and promote the food and wine heritage of the Marche region: For centuries, wine, olive oil, pasta, fruit and vegetables, along with the limited use of meat, was the daily diet of the sharecroppers of central Italy. These customs were analysed scientifically in the Seven Countries Study[19], a research project started in 1958 by professor Ancel Key at the University of Minnesota. The study not only identified the so-called Mediterranean diet for the first time, but also documented its protective role against coronary heart disease and other morbid conditions. Part of the research in Italy concerned Montegiorgio, a small village in the Marche region, and its rural population. The project rediscovers and safeguards food heritage and traditions as an authentic, sustainable and inclusive nutritional model. Thus, the objective is to save, promote and transmit to future generations the food and wine memory of former sharecroppers, an essential feature of the culinary heritage of the Marche region and the steward of a safer, healthier and more sustainable food future.
3. To create added value for the company: local and corporate cultural heritage can be a marketing lever for Made in companies, especially those operating in the food and wine sector (Riviezzo, A.; Garofano, A.; Granata, J.; Kakavand, S, 2017; Sgroi & Donia, 2020). Indeed, cultural heritage can be an important identity resource for companies seeking a competitive advantage and position in the global market (Misiura, 2006; Urde *et al.*, 2007; Balmer & Burghausen, 2018; Riviezzo *et al.*, 2021).
4. To promote cultural and food-and-wine tourism in the Marche region: the project also includes guided and gamified tours of typical sharecroppers’ houses, where the stories collected from the oral memories of former sharecroppers are told to visitors. The experience ends with a tasting of local wines at the CiùCiù company showroom.

[19] Seven Countries Study: https://www.sevencountriesstudy.com/

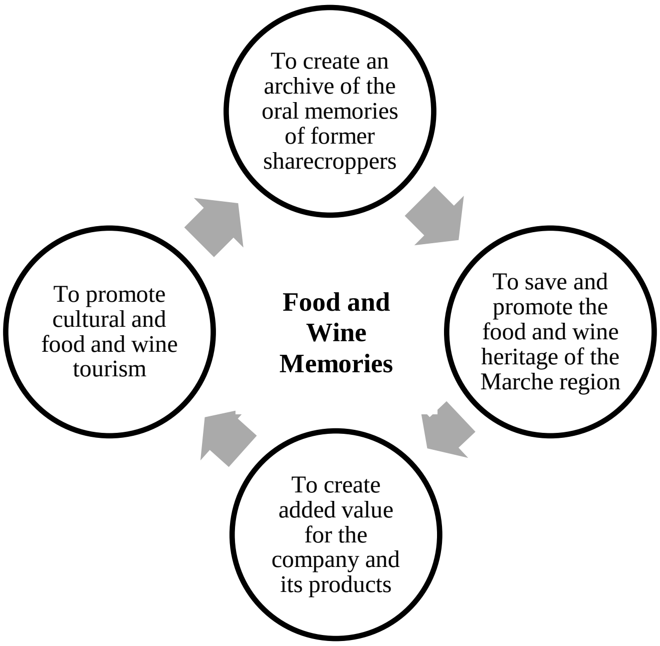


Fig. 21 – Objectives of the project (source: own elaboration)

4.3.2 Project implementation

The project started in 2018 and was developed in several phases (see Fig. 22).

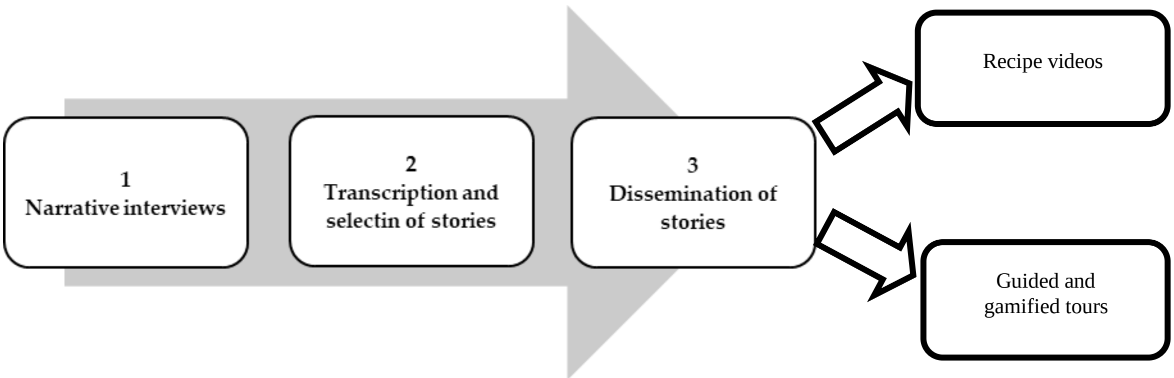


Fig. 22 – Project implementation (source: own elaboration)

The first phase involved interviewing former sharecroppers. Food and wine memories were collected through narrative interviewing (Atkinson, 2002; Kazmierska, 2018). The narrative interview is a research methodology that aims to gather an account of lived experiences that is not a collection of answers to questions, but a spontaneous narration, uninterrupted by the researcher's questions. The interviewees, or rather the narrators, thus provide a first-person account of their life or certain aspects of it, and the researcher can consequently work on a complete narrative. This technique is not intended to collect exact data, but rather to encourage witnesses to express, in their own words, even in dialect, their personal experiences.

i-strategies collected about 100 interviews involving people from 17 villages located in the province of Ascoli Piceno (Acquaviva Picena, Appignano del Tronto, Ascoli Piceno, Castel di Lama, Castorano, Colli del Tronto, Comunanza, Cupra Marittima, Grottammare, Monsampolo del Tronto, Monteprandone, Offida, Pedaso, Ripatransone, Rotella, San Benedetto del Tronto and Spinetoli), mainly in the south of the region, amounting to almost 130 hours of recordings.

The second phase was transcribing the interviews and selecting the most interesting stories. The selection was based on three criteria:

- Authenticity: stories linked to local history, identity and traditions;
- Driving values: stories as vehicles of values, such as sustainability, food waste reduction and social inclusion;
- Feelings: stories that emphasise the cultural and anthropological aspects of a recipe, the life of sharecroppers and the emotions linked to their oral memories.

The third stage is the dissemination of the collected materials. The selected stories were disseminated in two different ways, online and onsite.

In both cases, the tool used is storytelling, which Serrat (2017, p. 839) defines as "the vivid description of ideas, beliefs, personal experiences and life-lessons through stories or narratives that evoke powerful emotions and insights". Storytelling is a key medium in this project, as it can play an important role in saving and disseminating cultural heritage (Lueg *et al.*, 2021). Indeed, storytelling can be useful for disseminating cultural heritage in several ways (Carson *et al.*, 2008; D'Amore, 2004; Brouillard, 2015; Maulini, 2019; Karzen & Demonja, 2020):

- Education: storytelling is particularly useful as it helps people understand cultural heritage clearly by giving it purpose and context;
- Engagement: attaching cultural heritage to emotions increases the likelihood of connecting with audiences and creating impact;
- Social cohesion: storytelling brings people together and builds community and social cohesion;
- Cultural heritage protection: storytelling helps create an understanding of the value of tangible and intangible cultural heritage and can lead to greater attachment and protection.

Therefore, part of the project uses digital storytelling and is promoted on the website and social media pages of CiùCiù winery. In fact, one chef tried to modernise traditional recipes taken from the oral memories of sharecroppers and give them a name that encompassed emotions. One example is "tedious tagliolini", inspired by the story of a former sharecropper who, when asked what his snacks were, complained that he ate tagliolini too often. Indeed, sharecropper families had limited resources and flour and eggs were staple ingredients. Hence, egg pasta (tagliolini) was often served, even at breakfast. These interviews enabled the recovery of 40 local recipes.

Videos of the recipes were made by a professional video-maker and shared on CiùCiù winery's social media pages and website. The videos last about one minute. As the images of the chef preparing the dish scroll by, the original voice of the former sharecropper tells her/his own story related to that dish. The recipes are published on the winery's website mostly in step with the seasonality of produce and ingredients.

Another part of the project includes guided tours of sharecropping houses, where this rural system and its tangible and intangible heritage are presented through the life stories collected onsite. Recently, gamified tours have also been tested, especially with students. The gamified tour is structured as a competition in which visitors are divided into teams. After reading the stories based on the memories collected from the former sharecroppers who lived there, visitors are asked to answer questions to collect points. The aim is to experience the intangible heritage of the Marche region through authentic local stories while having fun (Vagnarelli, 2022).

In both tours, storytelling is used to convey the history of sharecropping in the Marche region through the voices and faces of those who were part of this rural system, while at the same time actively and emotionally engaging the tour participants.

4.3.3 Material Collected

In order to explore the selected case study, various materials were analysed (see Tab. 17).

Materials from the "Marche Food and Wine Memories" project	
Publications	Project publications, reports
Videos	Video recipes, video reports, promotional videos
Online materials	Institutional website, social networks
Pictures	Pictures taken during the visits to the sharecroppers' house
Participant observation	Visits to the sharecroppers' houses
Internal statistics	Number of visitors participating in guided and gamified tours
Interviews	Local key informants
Secondary data	Regional statistics

Tab. 17 – Collected materials (source: own elaboration)

We collected materials produced for the project, including project publications, reports and online materials, such as websites and videos. We also analysed visual data, such as pictures taken during the visits, to document the structure of the tours and communication tools.

More specifically, i-strategies produced a short report on the project in Italian and English. Furthermore, as the start-up is a partner in European projects dealing with heritage marketing and storytelling, documents produced within the framework of these projects are also available. In this case, too, these documents provide information about certain aspects of the project, such as gamified tours.

The online material is very rich. The company has an online presence with a website and social media pages. This allowed an analysis of how and what it communicates on these channels. The winery's social media platforms (Facebook and Instagram) feature videos filmed to safeguard traditional sharecropping recipes. The social media pages link to the winery's website where an entire section is dedicated to "Antiche ricette"[20]. In addition to videos, the website contains a brief description, the ingredients list, method and recommended wines. In addition, the i-strategies YouTube channel[21] provides videos reporting activities carried out within the project. It features a promotional video of the project, the recording of an online roundtable where experts from different institutions (UNESCO, FAO, Maison des Cultures du Monde-Centre français du patrimoineculturel immatérial, UniversidadeEuropeia of Lisbon and NEOMA Business School) were invited to discover and evaluate the project and finally, two videos presenting the work carried out with

[20] "Ancient recipes": https://www.ciuciutenimenti.it/antiche-ricette/
[21] i-strategies Youtube channel: https://www.youtube.com/channel/UCJK6vFblIXxxELvkcE-Gnmg

students from the University of Macerata (Italy) and the University of Heilbronn (Germany) during the experiential activity “Intangible cultural heritage and sustainable tourism development in the Marche region, Italy” organised with the two universities.

Finally, photos and videos taken during the guided and gamified tours are available.

Primary and secondary data were collected in addition to the materials created for the project.

Among the primary data, we had access to information on visitors who took part in guided tours in 2018 and 2019. The activity was suspended in 2020 and 2021 due to the COVID-19 pandemic. Data for 2022 are still partial.

In addition, five semi-structured interviews were conducted between September and October 2022 and involved key informants from the wine company promoting the project, the local administration and local entrepreneurs working in the hospitality and cultural sectors. The design of the interviews was based on the literature review, with a focus on the four pillars of sustainable development and the variables identified as potentially contributing to sustainable tourism development in rural areas. The interviews were recorded, transcribed and analysed manually.

The purpose of the interviews was to understand:

- Whether knowledge of the project is widespread among various actors operating in the same area;
- The strengths of the project and its contribution to sustainable tourism development and local development;
- The weaknesses of the project, and therefore the areas for improvement.

This investigation is useful for understanding the managerial implications for sustainable tourism development in rural areas and, thus, the contribution of rural heritage.

Finally, on two separate occasions, we conducted participatory observations during gamified tours. The first observation was conducted on 28 April 2022 during a visit organised for the international partners on a European project. The second was conducted on 12 May 2022 during a visit organised for students of the University of Macerata and the University of Heilbronn. During these observations, the structure of the tours and the techniques for presenting the collected heritage were examined.

As secondary data, we collected data from regional statistics on arrivals and presences in the municipality of Offida from 2017 to 2021.

4.4 Results

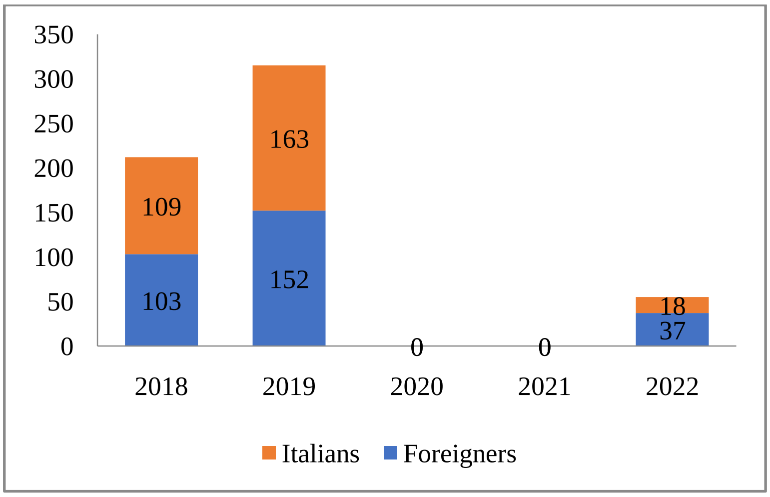
Examination of the materials collected provides a holistic and in-depth analysis of the case study.

Analysis of the publications suggests that, as a research project, “Marche Food and Wine Memories” aims to create an impact on the territory and particularly on the cultural and social aspects of sustainability. When focusing on the cultural dimensions identified in the theoretical framework, the project collects, saves and enhances local heritage that would otherwise have been lost. This heritage is absolutely place-specific and, therefore, an identity resource for the territory. The project has also restored dignity to the memory of former sharecroppers, increasing the sense of pride and belonging, not only for those who lived and told their stories, but also for their families and those who find elements of their own family histories in those narratives. In terms of social sustainability, the project has certainly stimulated intergenerational dialogue. Indeed, by reviving interest in the sharecropping heritage, it has also shed light on some of the traditional values of this rural society that should be reconsidered today, such as sociability, not wasting food and frugality.

Analysis of online materials, videos and photos shows that communication on the web is very effective and can enhance the project and the activities already carried out. It will be interesting to study how many people the posts on social media and the video recipes have reached and what kind of reaction they have provoked.

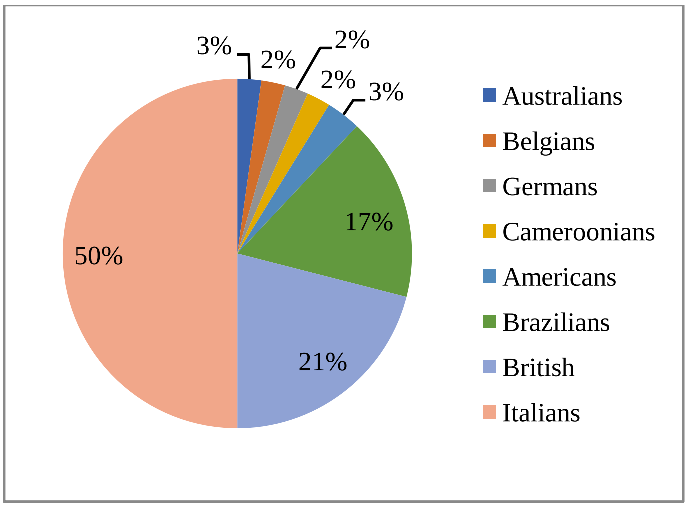
Participatory observations during the visits allowed us to improve our understanding of the structure of the tours and the techniques used to present the heritage gathered from the memories of former sharecroppers. Although the gamified tour is still at an experimental stage, a number of observations can be made. The tours are well structured and well designed. Reading a story with illustrations and questions is an effective way to engage participants. One way to improve the experience could be to use digital tools: currently, all communication tools are paper-based. In addition, the environment should be equipped to meet participants' needs, e.g., by providing shaded areas during tours. Rural heritage is presented effectively during gamified tours. The thoughtfully selected stories successfully evoke a time that now seems to be very distant. Moreover, one of their strengths is that they are told in the place where they occurred. However, the focus is mostly on the stories and the intangible heritage they reveal, and the surrounding tangible heritage is sometimes neglected. It would be good to devote space to rural evidence from the surrounding area, such as rural houses and the landscape that has been considerably shaped by sharecropping culture. Other comments concern access to the visits. So far, visits have been offered alongside other events. No information is provided about booking a visit, making it an "invitation only" event. Important targets are high schools (especially those specialising in catering and hospitality) and universities (tourism, cultural heritage and wine marketing). Still, it would be interesting to open up this activity to a wider public.

Data on visitors, especially from the pre-pandemic years, can give us some additional insight. As shown in Graph 11, the number of participants on guided tours increased before the COVID-19 pandemic. In 2018, 212 people (103 foreigners and 109 Italians) took part in the guided tours, and in 2019, the number was 305 (163 foreigners and 152 Italians). After a two-year stoppage (2020 and 2021), visits resumed slowly. For 2022, the graphic shows data up to the summer (55 participants, including 18 Italians and 37 foreigners).

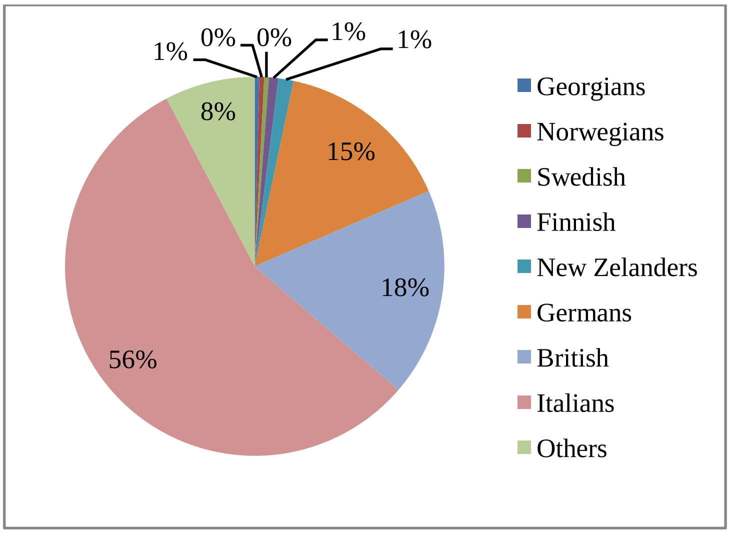


Graph 11 – Number of visitors to the sharecroppers' houses (source:own elaboration)

Two observations can be made from the data on visitors' country of origin (see Graph 12 and Graph 13). First, this project holds great interest for foreign visitors, even though at least half of participants in 2018 and 2019 were Italian. British visitors are the most represented among them. This is an interesting aspect, as many British people have moved to the Marche region. This project can give them a better understanding of the culture of the place they live in and help them integrate culturally.

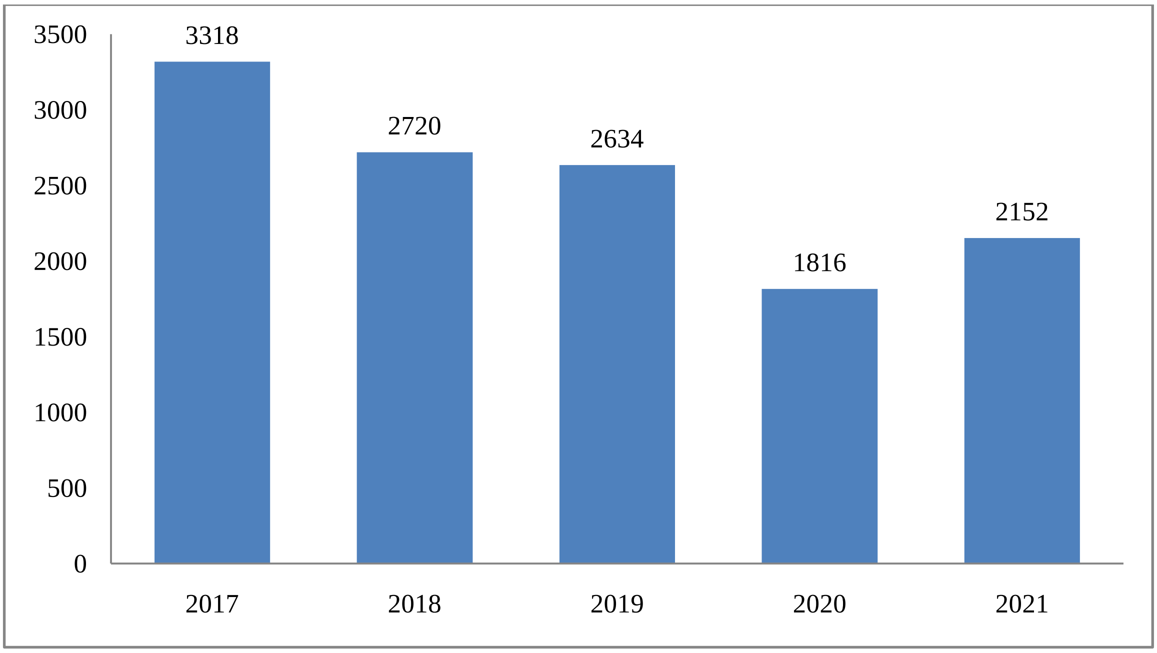


Graph 12 –Visitors' countries of origin (2018) (source: own elaboration)



Graph 13 – Visitors' countries of origin (2019) (source: own elaboration)

Further considerations should be made when these data are compared to regional statistics[22] on arrivals in Offida. As shown in Graph 14, arrivals in Offida were on the decline before the pandemic. There was a slight recovery in 2021, and data for 2022 are not yet available. Even though tourism was declining in 2017–2019, it is undeniable that the pandemic could be an opportunity for future tourism development. COVID-19 has accelerated some trends that were already underway, such as the decline in mass tourism in big cities and the growing preference for less well-known, less frequented and more authentic places that allow the tourist to temporarily feel like a citizen. This makes rural heritage a key resource for tourism development in the coming years.



Graph 14 – Total arrivals in Offida (Italy) from 2017 to 2021 (source: own elaboration)

[22] Marche Region tourism statistics: https://statistica.regione.marche.it/Marche-in-Numeri/Turismo

4.5 Discussion

"Marche Food and Wine Memories" is a project that aims to safeguard and enhance the rural cultural heritage linked to food and wine through the oral memories of the last witnesses of sharecropping as a distinctive element of local culture and regional identity. The analysis of the various collected materials allowed us to understand the main strengths and weaknesses of the project and to reflect on the project's current contribution to the different dimensions of sustainability.

The above observations regarding the role of cultural heritage in sustainable development (see Tab. 16) are the basis for a number of considerations.

From an economic point of view, local companies in the field of tourism and hospitality stated that the visits organised within the project increased their customer numbers. Indeed, one of the interviewees reported that, of the people who came to Offida for this project, "some came back, others sent someone else" (KI 3). The project is welcomed because it attracts tourists, enhances the place's image, and boosts the local economy. However, so far, visits have only been offered occasionally, thus preventing the attainment of the economic benefits that the project has the potential to create. Under the current setup, the project cannot boost local entrepreneurship, create new job opportunities or attract external investments. Another weakness that emerged from the interviews is that the project alone cannot create sustainable tourism in the area. A network is needed of the various local actors working towards a common goal. In this regard, one of the interviewees stated: "the project has potential; it is certainly a resource that can promote sustainable tourism, but on its own, it is unlikely to be successful. Collaboration between different local public and private actors is needed for developing a more structured and effective idea" (KI 5). Therefore, from a managerial point of view, greater involvement and collaboration with the social, economic and local administrative actors could be the key for rural heritage to truly contribute to sustainable tourism development.

From a social point of view, the project's potential for an intergenerational and cultural exchange with visitors is recognised. Indeed, storytelling can stimulate curiosity about one's family history, perhaps linked to sharecropping. This opens a dialogue between different generations that can strengthen relationships and sociability and stimulate new ideas. Moreover, especially for foreign tourists, "it is like coming into contact with a distant and exotic civilization that they do not know and which they are immediately curious about" (KI 1). This leads to exchange and openness towards others. However, what is well expressed in the documents and materials produced for the project is not well received by local stakeholders and the local community. Generally, the project is not well known at local level, and when it is, only superficially. From the point of view of marketing, there should be better communication of the project with the local community because "informing locals of this project can have a resonating effect in the area; otherwise, the risk is that the project remains somewhat isolated and an end in itself" (KI 2). Indeed, a better understanding of the goals and the work behind them could increase engagement and appreciation among residents and facilitate collaboration. This is fundamental, in terms of sustainable tourism, as the active involvement of the local community would avoid the risk of incompatibility between tourist activities and the lives of locals. Ultimately, how the project is structured and communicated has, to date, failed to produce effects on quality of life or to encourage the creation of networks between local communities, companies and institutions. At the managerial level, improving these aspects will be crucial for sustainable tourism.

Culturally speaking, the rescue and enhancement of a heritage that had previously gone unnoticed and would otherwise have been lost are certainly recognised as a strength. This has had the consequence of restoring the dignity to the rural heritage that living witnesses had not considered worthy of attention and rediscovering the family roots of former sharecroppers. The project has often been defined as "far-sighted". Moreover, the re-evaluation of the sharecropping heritage is recognised as an additional asset for the local cultural offer, which already boasts a remarkable heritage of history and art, craft traditions and food and wine. In fact, "the project adds a further piece to the culture of Offida, and this could be an attraction for different types of tourists" (KI 4). The project enables further differentiation of the offer and potentially attracts new visitors. From a managerial point of view, digital technologies can support further development of the project. One respondent suggested that "to ensure the project has an economic impact, it is necessary to find a modern way whereby those who come can enjoy this heritage, even independently. Digitalisation could make these memories more material" (KI 5).

From an environmental point of view, the project is recognised as having the potential to increase awareness of environmental values among local communities and tourists alike. "The project helps us to reflect on the way the territory, society, the economy has developed over time and perhaps leads us to reassess certain values and practices deemed outdated but, in reality, very current" (KI 4). In particular, the interviewees emphasised its value for the younger generations, who consider rural culture to be very remote. "This project can promote environmental sustainability, but needs to be embraced by more people to be effective" (KI 2). There is again a need to work in concert with others and to involve and train stakeholders and the local community to be able to provide truly sustainable services that are also environmentally sound.

The project's current contribution to sustainability is summarised in Tab. 18.

ECONOMIC SUSTAINABILITY	
Theory	***Project (today)***
1. Source of income for tourism and hospitality sectors	An occasional source of income
2. Source of income for tourism and hospitality-related sectors	An occasional source of income
3. Encouragement for local entrepreneurship.	Not currently
4. Source of attraction of external investments	Not currently
5. Employability opportunities for residents	Not currently
SOCIAL SUSTAINABILITY	
Theory	***Project (today)***
1. Enhancement of quality of life	Not currently
2. Stimulus for sociability and intergenerational dialogue	Through interviews and enhancement of sharecropping values
3. Local empowerment through involvement of communities	Not currently
4. Stimulus for networking among local communities, companies, and institutions	Not currently
5. Compatibility of tourism activities with the life of local people	Not detectable with our data
CULTURAL SUSTAINABILITY	
Theory	***Project (today)***
1. Enhancement of the history and culture of the territory	It collects, saves and enhances a local heritage that would otherwise have been lost
2. Development, improvement and enhancement of the territory's image	Not currently
3. Stimulus for cultural exchange	Between different generations and cultures
4. Boosting the offer of cultural and recreational activities	Not currently
5. Increasement of sense of pride and belonging among residents	Restoring dignity to rural heritage

ENVIRONMENTAL SUSTAINABILITY	
Theory	***Project (today)***
1. Contribution to the maintenance of natural resources and the local ecosystem	Not currently
2. Stimulus to the increase of awareness about environmental values among both local communities and tourists	Partially: it is embedded in the rural heritage, but it needs to be enhanced.
3. Raising awareness and educating local entrepreneurs on ecological transition issues	Not currently
4. Awareness of environmental issues in the upkeep and restoration of the historic and cultural heritage	Not currently
5. Involvement of local communities in activities related to the environmental recovery and revitalization of the rural heritage and its setting for tourism usage	Not currently

Tab. 18 – The contribution of the "Marche Food and Wine Memories" project to sustainability (source: own elaboration)

4.6 Conclusions

With a view to making a theoretical contribution to the debate on tourism sustainability, this paper has investigated the possible contribution of cultural heritage to sustainable tourism development in rural areas. The innovation of the research consists in having suggested a connection between the three dimensions of cultural heritage value and the four dimensions of sustainability (see Fig. 20). After recognising the close relationship between these aspects, a framework has been provided (see Tab. 16) to guide the analysis of a case study.

The case study was chosen because it is considered explanatory. Furthermore, as already mentioned, studying this phenomenon in the rural context is urgent, in light of the need to reduce territorial imbalances in different areas, as recently highlighted by European regional policies and structural funds. For example, Italy allocated part of the funds that the European Union provided after the COVID-19 pandemic to rural areas, expressly linking the development of these areas to sustainable tourism.

When it comes to the analysis of research results, we can argue that the "Marche Food and Wine Memories" project is currently contributing to cultural sustainability, but its contribution to the other pillars of sustainability should be improved. In fact, cultural sustainability is only the first step in triggering a virtuous circle that benefits social, economic and environmental sustainability. In particular, some fundamental elements emerge from the areas of improvement: involvement of the local community, involvement and training of local stakeholders and networking between the different actors in the territory. Moreover, from an organisational point of view, the activities should be planned and managed regularly with the support of professional marketing and management skills. The use of technologies and communication techniques can be a very useful support tool for making the intangible heritage that is enhanced by this type of project more tangible.

To conclude, it is possible to promote sustainable tourism through the enhancement of place-specific cultural (intangible) heritage only if the local community is involved, dialogue and collaboration are created between the various local actors and the right professional skills are involved. Therefore, cultural and human resources are important resources for the development of the territory.

The research examined only one case study. Further investigation should collect quantitative data on heritage-based tourism initiatives to frame their contribution to sustainable development. Moreover, future research should be directed at analysing the perceptions of tourists.

5. The role of place and cultural heritage in the relationship between brand heritage perception and willingness to pay more. *A pilot study*

5.1 Introduction

As stated in the first chapter of this thesis, the literature on heritage marketing mainly focuses on the role of the temporal dimension and corporate heritage. Thus, there is a lack of analysis on the potential role that local cultural heritage and the place can play within heritage marketing strategies.

Therefore, this research aims to explore this gap and to deepen the understanding of the potential role that a place rich in cultural heritage can play for a company operating there. The central question guiding the research concerns the contribution of the place and cultural heritage in heritage marketing strategies.

To answer this question, research focuses on the consumer perception. Studies in the heritage marketing literature have analysed how brand heritage perception influences consumer behaviour, communicating authenticity (Spiggle *et al.*, 2012; Napoli *et al.*, 2014; Rindell & Pinto Santos, 2021), brand trust (Wiedmann *et al.*, 2011a; Blombäck & Brunninge, 2013; Rose *et al.*, 2016), emotional attachment (Ballantyne *et al.*, 2006; Wuestefeld *et al.*, 2012; Rose *et al.*, 2016), and perceived quality (Rose *et al.*, 2016; Pecot *et al.*, 2018). This research pays particular attention to the relationship between brand heritage perception and consumer willingness to pay more. Although this relationship has already been studied (Rose *et al.*, 2016; Pecot *et al.*, 2018), there are opinions that problematise this relationship (Scarpi, 2021), indicating the need for further research.

As the area under investigation is still largely unexplored, the current literature does not provide a measurable relationship that assesses the moderating effects of a place rich in cultural heritage in the relationship between brand heritage (Pecot *et al.*, 2023) and consumer predisposition to pay more (Habel *et al.*, 2016).

In order to fill this gap and answer ourresearch question, the study aims to investigate, through quantitative research, the relationship between brand heritage and willingness to pay more, exploring the role of a place rich in cultural heritage. This is a pilot study in which I am adopting a quantitative methodology for the first time. Given my inexperience in this quantitative approach, the main objective is to experiment with the collection and analysis of quantitative data in order to gain confidence and assess the feasibility of the methodology for future research.

The chapter is structured as follows: Section 5.2 presents the conceptual framework of the study, describing the model to be tested and the hypotheses. Section 5.3 presents the methodology used to collect and analyse the data, with a detailed explanation of the moderating variable and its manipulation. The methodology section also explains the measurement of the two variables, brand heritage and willingness to pay more. Section 5.4 presents the results, which are then discussed in Section 5.5. where the managerial implications, limitations of the study and future research are also presented.

5.2 Conceptual framework and hypotheses development

The researchhas two distinct objectives. Firstly, it investigates the link between brand heritage perception and the willingness to pay more. Secondly, it examines whether the fact that a company operates in a place rich in cultural heritage has a significant impact on this relationship.The conceptual model is presented in Fig. 23.

Research in the field of consumer perception also investigates the effect of brand heritage and its implementation as a marketing strategy on consumer behaviour (Pecot *et al*., 2018). One aspect of consumer behaviour that has been studied is the willingness to pay more (Rose *et al.*, 2016; Pecot *et al*., 2018). In this regard, the literature has mainly provided arguments in favour of this relationship;however, recent studies have presented an alternative perspectivethat problematises this view. In particular, Scarpi (2021) demonstrated that using brand heritage in advertising can decrease the willingness to pay more. This research highlights how advertising based on brand heritage can influence the level of constructiveness adopted by consumers, affecting the psychological perception of proximity or distance from the brand. The adoption of higher levels of construction, bydistancing the consumer from the brand, may decrease the perception of brand uniqueness and the willingness to pay more, unless the brand actively engages with the consumer. Thus, further research on this topic could be interesting to better understand this dynamic and to effectively manage brand heritage and pricing strategies in today's markets.

Furthermore, it could be useful to investigate whetheroperatingin a place with a rich local cultural heritage has an impact on the perception of brand heritage and, subsequently, on the willingness to pay more. The literature extensively covers concepts such as "place of origin", "Made-in", and "Country of Origin" (CoO), arguing that these elements influence the perception of the company. Moreover, the literature on cultural heritage suggests that local cultural heritage can represent a valuable resource not only for the territory but also for companies (Montella, 2009; Cerquetti & Montella, 2012). Therefore, there is a body of research on the relationship between companies and place, as well as between companies and cultural heritage. However, the literature on cultural heritage marketing has not extensively examined the role of these two resources.

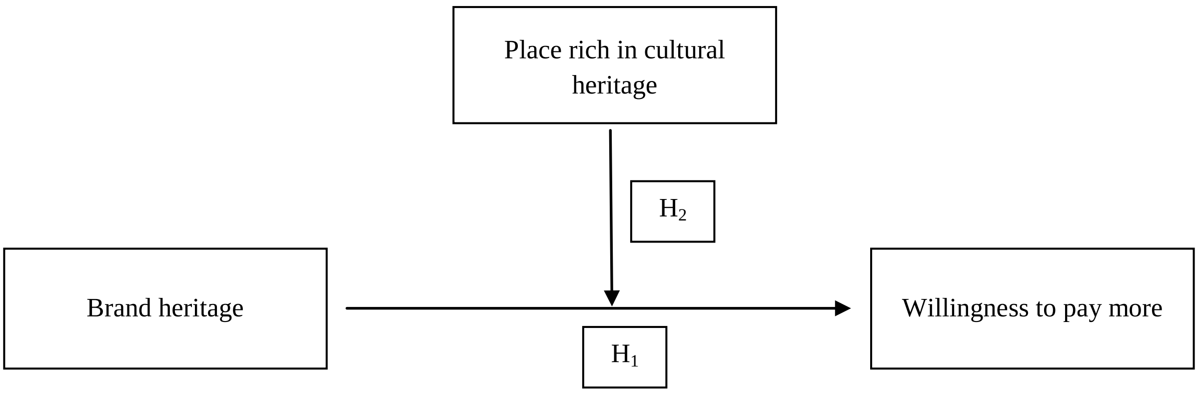


Fig. 23 – Conceptual model (source: own elaboration)

5.2.1 The relationship between brand heritage perception and willingness to pay more

Brand heritage as «a dimension of a brand's identity found in its track record, longevity, core values, use of symbols and particularly in an organisational belief that its history is important» (Urde*et al.*, 2007, p. 4), is an important aspect of brand identity.

In the field of heritage marketing, this concept emerges as a key element that significantly influences consumer behaviour.The ability of a brand to command a higher price is viewed as a critical indicator of brand equity (Randall *et al.*, 1998; Ailawadi *et al.*, 2003), and this pricing expertise is related to brand identity. As such, brand heritage, being an integral part of brand identity, not only shapes consumer behaviour but also functions as a key driver behind the brand's pricing power and its overall positioning in the market.

Academic research has further explored its potential impact on consumer behaviour by analysing the effects of the use of brand heritage on the way consumers perceive and engage with a brand. In particular, the willingness to pay more is identified as a direct result of brand heritage.Several studiesconfirm the positive association between brand heritage and willingness to pay more (Wiedmann *et al.*, 2011a). For example, Pecot *et al.* (2018) pointed out that brand heritage helps to increase the perceived quality of the brand and, as an indirect effect, also the willingness to pay more. The literature has recognised perceived quality as a key mediator of the effect of brand heritage on willingness to pay more (Steenkamp *et al.*, 2010). Furthermore, research shows that consumers' knowledge of brand heritage fosters the perception of brand consistency and clarity. This heightened awareness positively correlates with a reduced sensitivity to changes in pricing (Erdem *et al.*, 2002), indicating a greater willingness among consumers to pay more. In addition, research has shown that marketing activities, such as logo design, can increase willingness to pay a premium. Moreover, studies have demonstrated the role of nostalgia in reducing price sensitivity (Lasaleta *et al.*, 2014), with a focus on brand heritage evoking personal nostalgia among loyal customers (Pecot, 2016).Thus, the willingness to pay more is linked to the perception of brand heritage for several reasons, including perceptions of quality, credibility and nostalgia.

In conclusion, numerous studiesargue that a positive perception of brand heritage has a positive effect on willingness to pay more. In this research it is hypothesised that a positive relationship exists between the positive perception of brand heritage and the willingness to pay more.

H_1: A positive heritage brand perception has a positive effect on willingness to pay more.

5.2.2 The moderating role of a place rich in cultural heritage

The literature on heritage marketing does not give central importance to the exploration of the place dimension, but it is possible to make some considerations.

Balmer (2011b) suggesteda significant symbiotic relationship between brand heritage, places, communities, and professions in his studies on monarchies. According to the same author (Balmer 2011a), heritage identities can be powerful because they are part of the collective memory of a group, inextricably linked to specific cultures, places, and times. Burghausen and Balmer (2015) also made a subtle reference to place in their discussion on Corporate Heritage Identity Stewardship (CHIS). CHIS is a managerial mindset, a collective managerial propensity towards the organisation and its institutional assets, stakeholders and social environments in which the company is embedded and from which it has obtained its special heritage status. The CHIS has three dimensions of awareness: awareness of positionality, heritage, and custodianship. The concept of awareness of belonging is identified in the context of awareness of positionality. This highlights the significance of attachment, affiliation, and affinity with a place (such as a city ora county), social groups, and institutions (such as the family, community, and industry) in shaping corporate identity. Although place is not the primary focus, it clearly plays a crucial role in the heritage marketing context. Starting from these considerations, it is possible to state that a corporate heritage identity is shaped not only by the history of the company but also by the significance of the history and heritage of the products, as well as the significance of the history, culture, and heritage of the place where they are produced and the people who produce them.

To the best of the author's knowledge, the number of studies devoted to "place" in the literature on heritage marketing is limited. Spielmann *et al.* (2021) recently explored the relationship between a place and corporate heritage identity in the development of marketing strategies. The study found that place identity and corporate heritage identity are connected and contribute to the formation of multiple role identities of corporate heritage identity. Indeed, this qualitative analysis revealed that when a place and a company interact, various facets of heritage identity develop. The context in which a company is located, together with elements such as family history and territorial branding, emerge as determinants in corporate choices and actions. Therefore, the importance of place in shaping corporate strategies and how the characteristics of a place influence corporate identity are emphasised.Thus, as Charters and Spielmann (2014) already noted, the place of origin of the corporate heritage significantly shapes the corporate heritage identity. It also emerged that the shared identity of a place can influence thecorporate identity, particularly in regions where cultural heritage is an established resource. Therefore, the place is not just a superficial characteristic but an essential component of corporate heritage identity. It reinforces the idea that place gives a unique character to brands and shapes marketing strategies. Overall, the research emphasises the significance of place and culture in defining corporate heritage identities, confirming their multifunctional role.

The importance of cultural heritage, and therefore of place, for companies is also supported by the literature more focused on cultural heritage. Indeed, Montella (2009) identified three categories of cultural heritage value: presentation value, landscape value, and production value. The production value refers to the market uses derived from cultural heritage and the profits of companies active in various sectors, such as restoration, publishing, tourism, construction, real estate, performing arts, etc. Therefore, in the current context, cultural heritage is not only a source of historical knowledge, but also a resource capable of generating multi-stakeholder and multi-dimensional values. Also, Cerquetti and Montella (2012) argued that local cultural heritage represents a unique and irreplaceable resource, to which consumers attribute significant symbolic meanings.However, companies must be able to incorporate the value of these resources into their production processes to effectively exploit them.Napolitano (2015) emphasised the significant role that cultural heritage can play for "Made-in" companies in the context of a reflection on the "Value of Culture and Culture of Value". According to Napolitano and De Nisco (2017), a significant part of the value derived from a nation's cultural heritage is linked to its "cultural heritage effect". The term "cultural heritage effect" refers to the impact that the image of cultural heritage has on consumers' perceptions and attitudes towards products and services related to national heritage. This is particularly true for "prototypical" national brands, which can leverage the cultural heritage image of their country of origin to create unique associations between national identity and national products (Anholt, 2002; Banerjee, 2008).

In conclusion, the place plays a significant role in the heritage marketing context, influencing strategies and defining a unique brand character. This is confirmed by the already mentioned research by Spielmann *et al.* (2021), who emphasise the role of place in corporate heritage identity. Additionally, cultural heritage research identifies cultural heritage as a resource capable of generating multidimensional and multi-stakeholder value.

This research hypothesises that a place rich in cultural heritage positively impacts the relationship between the perception of brand heritage and the willingness to pay more.

H_2: A place with a rich heritage has a positive effect on the relationship between the perception of brand heritage and the willingness to pay more.

5.3 Methodology

In order to test these hypotheses, brand heritage was measured using a scale developed by Pecot *et al.* (2023), while willingness to pay more was assessed using the measurement proposed by Habel *et al.* (2016). To enrich comprehension of the relationship and research on heritage marketing, the research investigated the moderating variable place rich/poor in cultural heritage which we will refer to as "Place" for convenience. We manipulated the variable "Place" to examine ifthe fact that a company operates in a place with or without cultural heritage can influence the perception of the heritage brand and the willingness to pay more. Statistical analyses were conducted on the collected data to provide a perspective on how those elements interact in the specific context of the study.

5.3.1. Data collection and sample characteristics

Data was collected through an online questionnaire. The questionnaire was structuredin four sections. The first section presented the moderating variable of place; the second section aimed to measure the perception of brand heritage; the third section measured the willingness to pay more; the fourth and final section collected personal data.

A convenience sample of Italian consumers was used. The questionnaire was distributed online through social media, and participants were requested to complete it and share it with their acquaintances. This dissemination strategy aimed to reach a varied and representative sample. Tab. 19 shows the sample composition based on four variables: gender, age, education level and household income. The questionnaire gathered data from 222 participants, with around 72% being female.The age distribution revealed a significant presence of individuals aged between 25 to 34, who represented 43% of the sample. In terms of education, the majority of participants held at least a bachelor's degree (72.52%), while almost all had at least a diploma (98.65%). Regarding household income, 26.13% of the sample fell within the income bracket of 10,000 to 20,000 euro.

Variable	Frequencies	%
Gender		
Female	159	71.62
Male	60	27.03
Other	3	1.35
Age		
18-24	8	3.60
25-34	95	42.79
35-44	26	11.72
45-54	33	14.86
55-64	49	22.07
65-75	10	4.51
+75	1	0.45
Education level		
Primary education	0	0
Secondary education	3	1.35
High school	58	26.13
Bachelor's degree	30	13.51
Master's degree	78	35.14

Postgraduate degree [PhD, Postgraduate School, Masters, etc.].	53	23.87
Household income		
Less than or equal to 10,000	31	13.96
10,000-20,000	58	26.13
20,000-30,000	50	22.52
30,000-40,000	27	12.16
40,000-50,000	10	4.51
50,000-60,000	5	2.25
More than or equal to 60,000	6	2.70
Non-respondents	35	15.77
Total	222	100

Tab. 19 – Sample characteristics (source: own elaboration)

5.3.2 Manipulated variable: place and cultural heritage

The first section of the questionnaire introducedthe moderator variable "Place". This variable, manipulated as a binary variable, reflects the level of cultural heritage in a specific place, measured by its presence or absence. The main objective of this section is to examine the possible influence of the presence of a rich cultural heritage in a place on the relationship between the independent variable "perception of brand heritage" and the dependent variable "willingness to pay more".

Two levels of heritage presence have been identified: "presence" (=1) and "absence" (=2). Participants were randomly assigned to one of these two groups and asked to carefully read a text. The manipulation of "Place" was achieved by presenting two contrasting versions of the text, designed to evoke different perceptions of cultural heritage. Specifically, the group with the "presence" of cultural heritage read a text describing a place rich incultural heritage:

> This place is rich in cultural heritage. The town centre is outlined by towers, bell towers, churches, and historic buildings. Local markets are where craftsmen and farmers sell their products, continuing centuries-old traditions. Art treasures are often hidden behind the walls of ancient castles, which can be difficult to reach. The area's poor accessibility highlights the need for infrastructural and technological innovations. However, the local community, firmly rooted in its territory, is dynamic and lively in social and economic terms.

The group with "absence" of cultural heritage read a text describing a place where cultural heritage and history were not particularly relevant and where there was a strong orientation towards the future:

> This place is modern and dynamic, easily accessible and characterised by modern infrastructure and services. The town's architecture has an innovative design, and there are technological innovations. However, there is a weak attachment to the history of the place and little attention to the local cultural heritage. Over time, ties with roots and traditions have loosened. The social and economic life of the communities is actively projected into the future, driven by emerging trends.

5.3.3 Measures for dependent and independent variables: willingness to pay more and brand heritage perception

The second and third sections of the questionnaire measures brand heritage and willingness to pay more. These constructs were assessed with two scales derived from previous research. Depending on their assigned group, respondents read about Company A or Company B. Company A operates in a location rich in cultural heritage, while Company B operates in a location with relatively little cultural heritage.

The first scale, designed to measure brand heritage (Pecot *et al.*, 2023), encompasses four dimensions with a total of twelve items (see Tab. 20). The dimensions include Longevity, Symbols, Outdatedness, and Adaptability. Longevity is evaluated through statements such as "Company A/B has a strong link to the past", "Company A/B has roots" and "Company A/B has a rich history"; Symbols are assessed with statements such as "Company A/B is consistent in its product design", "Company A/B is consistent in its packaging" and "Company A/B has unique symbols (such as logos, packaging, colors, or style)"; Outdatedness, a reverse-coded dimension, is measured using statements like "Company A/B is stagnant","Company A/B seems stuck in the past" and "Company A/B needs updating";lastly, Adaptability is evaluated through statements such as "Company A/B knows how to reinvent itself", "Company A/B has successfully changed with the times", and "Company A/B has continuously evolved". Participants express their responses on a seven-point Likert scale, ranging from 1 (not at all) to 7 (very much).

DIMENSIONS		ITEMS	
1.	Longevity	1.	Company A/B has a strong link to the past
		2.	Company A/B has roots
		3.	Company A/B has a rich history
2.	Symbols	4.	Company A/B has been consistent in its product design
		5.	Company A/B has been consistent in its packaging
		6.	Company A/B has unique symbols (such as logos, packaging, colors, or style)
3.	Outdatedness	7.	Company A/B is stagnant (R)
		8.	Company A/B seems stuck in the past (R)
		9.	Company A/B need updating (R)
4.	Adaptability	10.	Company A/B knows to reinvent itself
		11.	Company A/B has successfully changed with the times
		12	Company A/B has continuously evolved

Tab. 20 – Measurement scale for brand heritage (source: own elaboration from Pecot *et al.*, 2023)

The second scale assesses the willingness to pay, measuring an individual's inclination to remain a customer of a companyand the readiness to pay a premium instead of opting for competitors (Habel *et al.*,2016). This scale includes three items (see Tab. 21), each utilising a seven-point Likert-type response format ranging from 1 (fully disagree) to 7 (fully agree). The statements include "I am willing to pay a higher price to Company A/B than to its competitors","I would continue to buy from Company A/B, even if other companies were cheaper" and "I am willing to pay a higher price for the benefits of the environment in which Company A/B operates".

	ITEMS
1.	I am willing to pay a higher price to Company A/B than to its competitors
2.	I would continue to buy from Company A/B, even if other companies were cheaper
3.	I am willing to pay a higher price for the benefits of the environment in which Company A/B operates

Tab. 21 – Measurement scale for Willingness to pay more (source: own elaboration from Habel *et al.*, 2016)

Tab. 22 presents the descriptive statistics of the variables used in this study, including the minimum, maximum, mean and standard deviation for each variable.

	N.	Min	Max	Mean	Std. Deviation
Place rich/poor in cultural heritage (moderator)	222	1	2	1.50	,501
Brand heritage perception	222	1.08	7.00	4.6682	1.00701
Willingness to pay more	222	1.00	7.00	3.9985	1.59578
Number of valid cases(listwise)	222	---	---	---	---

Tab. 22 – Descriptive statistics of the scales used in this study (source: own elaboration)

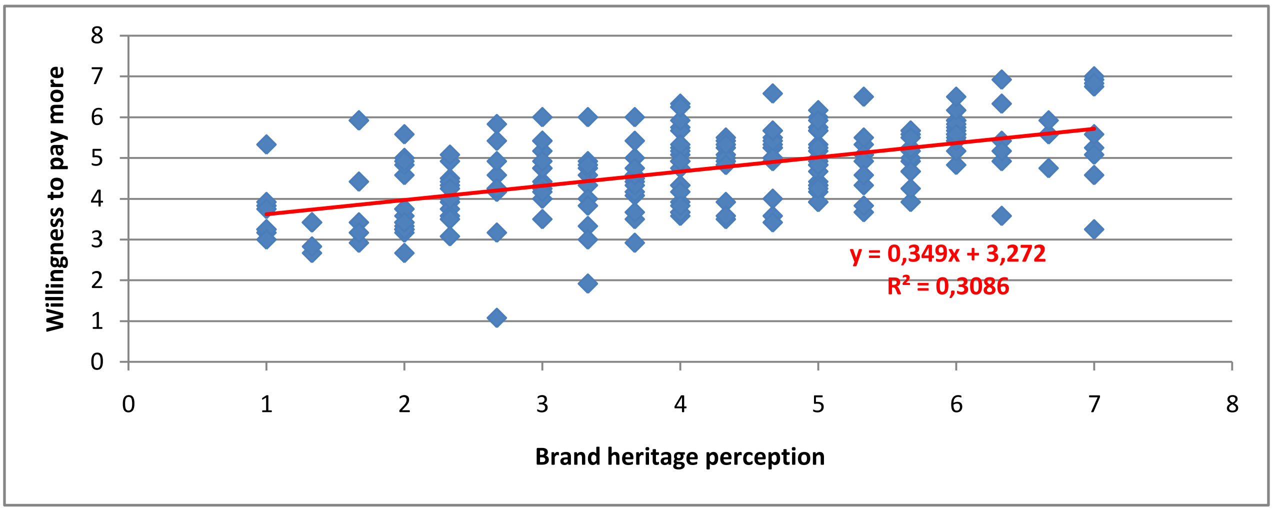
5.4 Analysis and results

The study aimed to examine the effect of brand heritage perception on the willingness to pay more, taking into account the place rich/poor in cultural heritage as a potential moderator of this relationship. The sample comprised 222 Italian consumers selected as a convenience sample to provide an overview of consumer perceptions in the Italian context. The statistical analysis was performed using SPSS (version 29.0.2.0) and Hayes' PROCESS macro (version 4.3), which was selected for its ability to handle models with categorical moderators and continuous variables, as relevant to our study (Hayes, 2022).

For data preparation, the Outdateness items were reverse coded and the items of the different dimensions were summed up. The mean of these sums was then calculated and used as the key variable in the regression analysis.

The regression analysis showed a moderate correlation between consumers' perception of brand heritage and their willingness to pay more ($R = 0.5555$). This indicates that the model explains around 30.86% of the variation in the dependent variable "willingness to pay more" (R-sq = 0.3086). Therefore, this suggests that the perception of brand heritage plays a significant role in influencing consumers' willingness to pay more. Analysing the coefficients of the model, it was observed that brand heritage perception hada positive and significant effect on willingness to pay more (Coeff = 0.9157, $p = 0.0022$).

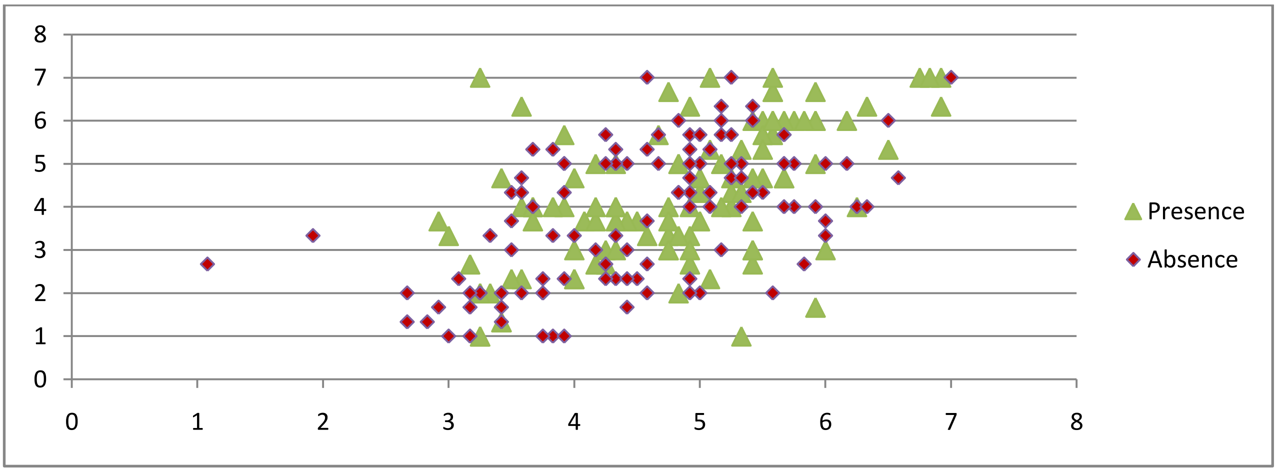
To illustrate the relationship between the perception of brand heritage and the willingness to pay more, a scatter diagram (see Graph 15) was created for a clear visual representation.



Graph 15 – Correlation between the perception of brand heritage and willingness to pay more (source: own elaboration)

The graphic represents the positive correlation between the perception of brand heritage and the willingness to pay more. The regression line equation (y = 0.349x + 3.272) indicates that, on average, a one-unit increase in the perception of brand heritage is associated with a 0.349-unit increase in the willingness to pay more. This result is in line with the regression coefficients obtained from the statistical analysis.

However, the examined variable "Place" as a moderator does not show a significant effect on the dependent variable (Coeff = -0.0046, p = 0.9958), suggesting that the variation in cultural heritage perception does not significantly affect the willingness to pay more.Note that the analysis of the interaction between the perception of brand heritage and the variable "Place" (Int_1) did not show a significant effect (Coeff = -0.0325, p = 0.8580). Graph 16 shows the relationship between brand heritage perception and willingness to pay more, taking into account the moderating variable "Place". The two series in the graphic represent the "presence" and "absence" conditions of the variable "Place". The graphic indicates no clear differences in willingness to pay more between the different "Place" conditions, as the two series show no particular distinction, but rather an overlap.



Graph 16 – "Presence" and "Absence" conditions of the variable "Place" (source:own elaboration)

5.5 Discussion and conclusions

This research aimed at analysed the relationship between consumers' perceptions of brand heritage and their willingness to pay more. Additionally, it intended to explores whether a company operating in a place rich in cultural heritage hada significant impact on this relationship. The proposed conceptual model guidedthe analysis of the hypotheses formulated, outlining the connections to be examined.

The results on the relationship between brand heritage perception and willingness to pay more indicate that the first hypothesis (H_1) was confirmed. The coefficient analysis revealed a positive and significant effect of brand heritage perception on willingness to pay more (Coeff = 0.9157, p = 0.0022). This result is consistent with previous research that highlights the positive relationship between brand heritage and consumers' willingness to pay more. Perceived brand heritage may contribute to higher perceptions of quality and stronger brand loyalty, which can positively influence consumers' willingness to pay more.

The results on the moderating role of the variable "Place" (H_2) showed thatit does not have a significant effect on the willingness to pay more (Coeff = -0.0046, p = 0.9958), contrary to expectations.Additionally, the interaction between the perception of brand heritage and place (Int_1) was found to have no statistically significant effect (Coeff = -0.0325, p = 0.8580). Thus, the relationship is not considered strong enough to draw significant conclusions.

In conclusion, the research confirms that the perception of brand heritage is important in determining the willingness to pay more. This result helps to consolidate and expand the existing theoretical basis. However, the absence of a significant moderating effect of place suggests that this relationship is generalisable, at least within the limits of the context examined in this research. Indeed, the evidence indicates that the correlation between the perception of brand heritage and willingness to pay more appears to be robust and stable, regardless of the specific context considered. Further investigation may be useful to explore additional variables or contexts that might influence this relationship.

These research findings provide managerial implications. Since positive perceptions of brand heritage positively influence consumers' willingness to pay more, a first managerial implication could be to invest in heritage marketing strategies. Additionally, the significant impact of brand heritage perception on willingness to pay more suggests opportunities for revising pricing strategies. Exploring opportunities for premium offers, products or services related to brand heritage could be a strategic approach to maximise profitability.Furthermore, even if the relationship between brand heritage and willingness to pay more appears to be independent of place and cultural heritage, leveraging a place with a rich cultural heritage can provide a competitive advantage, as other research has shown (refer to section §5.2.2).

Although this research contributes to the literature on heritage marketing, it has some limitations. Indeed,the research presented in this chapter is based on a quantitative study conducted on a sample of Italian consumers. The focus on a specific context may limit the generalisation of the findings to other cultural and national contexts, suggesting the need for further research. Furthermore, the assessment of place as a moderator could benefit from further refinement, taking into account any potential disciplinary biases of the author in constructing the manipulation. The inclusion of additional cultural heritage variables could reveal more complex dynamics in the relationship between place, brand heritage and consumer behaviour. Additionally, for the sake of intellectual honesty, it should be emphasised that my basic knowledge of quantitative methodology may be an additional limitation. It is important to acknowledge that my limited expertise in this area may impact the quality and accuracy of the research. Therefore, it is recommended to critically evaluate the results, taking into account this potential limitation.

Considering these limitations, future research could include different cultural contexts to explore differences in perceptions of brand heritage and willingness to pay more across different populations. This approach would allow to understand potential cultural nuances and differences that may influence the relationship between brand heritage and consumer behaviour.Furthermore, it could be explored whether the moderating effect of the presence of cultural heritage in the place where the company operates differs in cultures with different perspectives and values.Further investigations could evaluate and construct place-related variables, such as geographical, historical and cultural aspects, as moderators. This would also be interesting with a view for integrating heritage marketing research with other fields, such as the study of cultural heritage and country of origin. Exploring how these factors influence the relationship between brand heritage and consumer behaviour could enrich the understanding of this relationship. Constructing a measurement scale dedicated to this variable would be a significant contribution, providing a more rigorous assessment of place and brand heritage factors. Finally, it would be possible to conduct a longitudinal study on the long-term effects of the relationship between the perception of brand heritage and consumer behaviour, considering the impact of place on this dynamic. This study would contribute to the understanding of the stability of the relationship over time and how the influence of brand heritage, with place and cultural heritage as possible moderators, may evolve over time to influence consumer perception and behaviour and pricing strategies in the long term.

6. General conclusions

This thesis stemmed from a reflection on how the concept of cultural heritage has changed from being a source to being a resource. This reflection has led to a deeper exploration of heritage marketing within the resource-based view framework. On this basis, the thesis aimed to explore the relationship between a company, the corporate heritage, the local cultural heritage and the milieu.

The thesis presented an in-depth literature review on heritage marketing, followed by four connected studies.

The literature review on heritage marketing outlined the conceptual and theoretical framework guiding the research. It identified three main strands of research. The first outlines the key concepts and is considered the origin of the literature on heritage marketing, from which the other two strands also derive. The second strand focuses on heritage marketing tools, moving from an initial focus on specific tools, such as the corporate museum, to a broader and holistic assessment of the strategic and managerial implications. The systematic approach to heritage marketing tools enables a clear and functional categorisation to guide the implementation of heritage marketing strategies. The third and final strand analyses consumer perception of heritage branding and its implications, highlighting the crucial role of consumers in shaping corporate image. By developing different measurement scales, it contributes to a more nuanced understanding of this relationship. The critical analysis of the literature suggests that there is potential for further exploration of external heritage resources, particularly local cultural heritage. The prevailing emphasis on internal (corporate) heritage resources should be integrated with consideration of external resources. Furthermore, while the time dimension has been extensively studied, the role of place in the implementation of heritage marketing has remained largely unexplored.

On the basis of the reflection on the concept of heritage, the literature review on heritage marketing and the identified gaps, the research aimed to answer the following research questions:

RQ1: What role can corporate heritage, local cultural heritage and milieu play in heritage marketing strategies?

RQ2: How do heritage marketing strategies affect local cultural heritage and the milieu and contribute to local sustainable development?

To answer the first research question, the research conducted in the Burgundy and the Marche regions, as well as on consumer perceptions, indicate that corporate heritage, local cultural heritage, and the milieu can be crucial components of effective heritage marketing strategies. From a business perspective, these elements are considered essential assets that express identity and contribute to market differentiation. This is particularly important in today's market, which values authenticity, locality, craftsmanship and tradition. In the wine sector, for instance, research shows that brand image gains value by enhancing local cultural heritage and milieu, creating a unique and authentic identity. Although the study on consumer perception did not reveal a statistically significant moderating effect of place rich in cultural heritage, implying no substantial change in the relationship between brand heritage and a willingness to pay more, insights from the Burgundy research provide food for thought. Indeed, heightened awareness among stakeholders in Burgundy and the understanding and enhancement of the link between heritage, milieu and industry success among producers are critical components of the Burgundy wines' competitive advantage.This suggests that place-related added value may be more significant in the context of competition and overall market positioning rather than in directly influencing consumer behaviour, which may be mediated by other factors. Furthermore, the research confirms that consumer perception of brand heritage is significant. A positive perception at least of corporate heritage can influence consumer behaviour, creating strategic opportunities for pricing. Overall, these insights indicate that corporate heritage, local cultural heritage, and milieu are differentiating factors and act as key elements in defining successful heritage marketing strategies, influencing also companies' competitive positioning.

To answer the second research question, a summary of the research findings allows a reflection on how heritage marketing strategies affect the local cultural heritage and the milieu, and contribute to local sustainable development. In Burgundy, the wine industry actively preserves and enhances cultural heritage. This creates a virtuous circle that positively impacts not only brand image, but also cultural heritage preservation and enhancement, tourism development, and sustainable development. The study highlighted the interdependence between cultural heritage, the milieu and the wine sector, creating a potentially beneficial system that requires active cooperation to achieve value and sustainable results. The case study of the Marche region, which is the main focus of this thesis, allows reflections on how the use of local cultural heritage can have a positive impact on sustainability at cultural, social, economic and environmental levels. Therefore, leveraging cultural heritage, not only in online communication but also through tangible projects such as "Marche Food and Wine Memories", can play a fundamental role in promoting economic growth, social well-being and environmental sustainability.It is important to note that these conclusions are drawn from a single case study. Therefore, further research is beneficial for the wider applicability of these findings, possibly considering different cases for a more comprehensive understanding. Overall, these considerations support the assumption that heritage marketing strategies, by incorporating both cultural heritage and the milieu, can support the achievement of wider sustainable goals for the territory. In conclusion, the research highlights the positive potential of heritage marketing strategies for enhancing local cultural heritage and promoting sustainable development in the territory.

In summary, the research indicates that heritage marketing strategies are essential for creating value for companies, cultural heritage and the milieu, contributing to sustainable development when managed effectively and collaboratively.

In addition to answering the research questions, the thesis has contributed to the heritage marketing field by providing theoretical and methodological contributions. Furthermore, managerial implications, limitations and further research have also been highlighted.

The theoretical contribution of this thesis consists in the innovative approach to heritage marketing. In the scientific literature, heritage marketing has focused on corporate heritage, an internal resource, mainly exploring its temporal dimension with a focus on historical and omnitemporal aspects. This thesis extends the reflection to the place dimension, specifically emphasising the importance of local cultural heritage. Thus, the research provides a more comprehensive understanding of heritage marketing by combining the temporal and spatial dimensions and considering external heritage resources. The thesis argues that leveraging local cultural heritage and establishing a strong connection with the milieu can serve as a driver for gaining competitive advantage and positioning in the market. Implementing a strategy that also considers these aspects contributes to a stronger brand image and differentiation within the market.

Furthermore, the thesis goes beyond the established understanding of heritage marketing only as a strategic tool for market competitiveness. It demonstrates how this approach can simultaneously act as a driver for preserving and enhancing local cultural heritage and contributing to local sustainable development. Indeed, by actively engaging and preserving local cultural heritage, companies not only strengthen their ties with the territory, but also contribute to the overall sustainability of the area, particularly through tourism. These reflections represent a first step towards an interdisciplinary approach to heritage marketing, which can cross-fertilise with disciplines such as cultural heritage or CoO studies. In summary, this thesis broadens the horizons of heritage marketing research by integrating corporate heritage and local cultural heritage, as well as temporal and spatial dimensions. It provides a more nuanced and comprehensive perspective on how companies can strategically leverage heritage to gain a competitive advantage, while contributing to the sustainable development of the territory in which they operate.

The thesis also makes a methodological contribution. The website analysis model presents a systematic and multidimensional approach that contributes to evaluating the corporate communication of the corporate and local heritage and milieu online. In addition, the conceptual model on brand heritage perception and willingness to pay establishes an innovative framework for understanding the dynamics between consumer behaviour and brand heritage perception, considering the moderating role of a place rich in heritage. Despite the limitations discussed in the individual studies, these methodological contributions provide valuable tools for investigating the relationship between the company, its heritage, the local cultural heritage, and the milieu.

Before outlining the general managerial implications, a benchmarking analysis comparing the Marche region with good practices of the Burgundy region is presented in order to suggest some improvements in this area, as it is the main case study.

Despite some weaknesses, Burgundy has been identified as a good practice because it has developed a system that enhances the link between the productive sector, the cultural heritage and the milieu. This system enables the wine sector to create value for its brand image, cultural heritage protection and enhancement and the territory, particularly through tourism development.

Burgundy has successfully established a strong brand identity in the wine sector by enhancing its cultural heritage. The UNESCO designation of the *Climat du Vignoble de Bourgogne* has further increased the authentic and distinctive perception of the region, contributing to the success of wineries and the growth of tourism. The importance of the relationship between cultural heritage, milieu, and the wine industry is widely acknowledged by both producers and stakeholders. This creates a virtuous circle where investments in protecting and enhancing cultural heritage increase the brand's value. When focusing on the case of the Marche region, the lack of enhancement of corporate heritage, local cultural heritage and milieu could indicate a lack of awareness of the importance of these aspects in marketing strategies. To improve the image of individual wineries and of the entire regional wine sector, stakeholder training programmes on heritage issues and effective collaboration and communication strategies could be implemented.

The collaboration between local actors is another important aspect. It emerged that the potentially beneficial system described above requires the active collaboration of all the actors involved and the training of operators in the wine sector, the hospitality sector, management, etc. This process aims to create a human capital that can generate value for the territory. The analysis of the "Marche Food and Wine Memories" project in the Marche region shows that sustainable tourism can only be promoted through the enhancement of the local cultural heritage by involving local communities, establishing dialogue and cooperation with the various local actors and using appropriate professional skills. Thus, cultural and human resources are crucial elements for the development of the territory. The Burgundy model demonstrates effective collaboration between various local actors dealing with cultural heritage, environment, viticulture and research. Inspired by its success, the Marche region could invest in collaborative initiatives involving different local actors. The implementation of collaborative structures can improve communication and collaboration between local actors, contributing to the sustainable development of the region in terms of production, culture and tourism.

The impact on tourism resulting from these activities also requires attention, and should be considered in terms of its wider social, economic, and environmental effects. The Marche region could be inspired by Burgundy's intention to privilege the quality of tourist arrivals over quantity. Although these regions have different tourist flows, adopting a sustainability approach could be wise. Indeed, nowadays, sustainability is a crucial aspect. Therefore, adopting a multidimensional approach that encompasses environmental, economic, cultural, and social dimensions, as observed in Burgundy, can provide a more holistic and impactful strategy.

Benchmarking analysis provides valuable insights into managerial implications that can be generalised in similar contexts. Firstly, companies should consider local cultural heritage and milieu as key components in building brand identity and for heritage marketing strategies. Additionally, investing in the protection and enhancement of cultural heritage not only generates value for the company but also creates value for the cultural heritage and the territory in which the company operates. Communication focused on corporate and cultural heritage is recognised as a crucial element; thus, investing in heritage marketing strategies, both digital and non-digital, can be beneficial. In addition, the training in heritage marketing of local staff and key actors emerges as a recommendation to improve communication and promote awareness of the potential role of corporate heritage, local cultural heritage and milieu. Collaboration between local actors is essential, emphasising the importance of partnerships that promote a sustainable environment for the benefit of the industry, the territory and the community. Moreover, companies are increasingly placing sustainability at the centre of their managerial considerations; therefore, addressing environmental, social, economic and even cultural challenges is essential. It is crucial to encourage engaging initiatives for the local community, enhance the heritage linked to the company, and promote sustainable tourism activities to ensure the long-term success of the company, the sector, and the territory.

This research has limitations and future research could implement the assumptions made so far. One limitation is the linguistic aspect, in that it mainly considered scientific publications in Italian and English, with some exceptions for those in French. Additionally, the analysis primarily focused on literature related to heritage marketing and cultural heritage. It highlighted the necessity for a more comprehensive investigation across various scientific fields, including "place of origin", "Made-in" "CoO". While the conclusions may be applicable to the Made-in sector in general, it is important to note that the research focused solely on two specific cases within the wine sector. To illustrate these conclusions further, the research could be extended to other sectors related to Made-in. Additionally, the analysis of the consumer side was based on a sample of Italian consumers. Future research could improve the analysis by including different cultural contexts and refining evaluation methodologies. Additionally, dedicated measurement scales could be developed for place-related variables, such as geographical aspects, historical and cultural factors, to be used as moderators.

In conclusion, this thesis has investigated the relationship between the company, its heritage, the local cultural heritage and the milieu, highlighting the strategic importance of these relationships and their significant impact on the development of a territory. While acknowledging its limitations, the research proposes new perspectives, provides theoretical and methodological contributions and suggests possible directions for future interdisciplinary research in the field of heritage marketing. Tab. 23 shows a synthesis of the research design.

Research topic		Corporate and local cultural heritage as marketing lever for Made in Italy companies
Research questions		1. What role can corporate heritage, local cultural heritage and milieu play in heritage marketing strategies? 2. How do heritage marketing strategies affect local cultural heritage and the milieu and contribute to local sustainable development?
Research objectives		• To explore the relationship between the company, its heritage, the local cultural heritage and the milieu. • To make theoretical contributions to the literature on heritage marketing. • To understandthe possible managerial implications and suggest possiblesolutions.
Theoretical framework		The theoretical framework considers RBV, focusing primarily on the heritage marketing literature and also including the cultural heritage literature.
Contribution	**Theoretical**	• Integrating the different strands of research related to heritage marketing, usually related to the temporal dimension and corporate heritage, with the analysis of the spatial dimension and local cultural heritage. • Demonstrating how leveraging local cultural heritage and the company's link with the place where it operates (and thus with all the specific local resources) can be a valuable driver for competitive advantage and market positioning and how this strategic approach can simultaneously be a source of preservation, enhancement and sustainable development.
	Methodological	• Proposing a website analysis model aimed at assessing the level of enhancement of corporate and local heritage and the relationship of companies with the milieu. • Proposing a conceptual model to analyse the relationship between brand heritage perception and willingness to pay more, taking into account the moderating role of a place rich in heritage.
	Managerial	• Investing in heritage marketing, including not only corporate heritage, but also local cultural heritage and milieu in marketing strategies in order to have an inimitable competitive advantage. • Investing in the protection and enhancement of local cultural heritage to add value to the company but also positively contribute to preserving cultural heritage and developing the surrounding territory. • Training local workers, organisations and key stakeholders in heritage marketing in order to improve communication and increase awareness of the potential roles of corporate heritage, local cultural heritage, and milieu. • Promoting partnerships among local actors, foster a sustainable environment, benefiting the industry, the territory, and the community. • Focusing on sustainability, considering environmental, social, economic and also cultural challenges in their managerial decisions.

Tab. 23 – Synthesis of the design of the research (source: own elaboration)

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