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The Promise And Potential Of Sustainable Heritage Tourism Marketing

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The nature of this submission fits best into the research based case studies category but it also overlaps with the market and marketing research and nature-based and sustainable tourism research in practice categories.

INTRODUCTION

If properly conceived, sustainable marketing should be one of the many tools used to balance preservation and tourism priorities at heritage sites. The problem, however, is that very little guidance is available to assist managers in the development of a sustainable marketing plan. This paper tests a proposed sustainable heritage tourism marketing model using the Rideau Canal World Heritage Site. In combination with the other mixed results found in the literature, this case study confirms that the fundamental challenge is short-termism while sustainable marketing requires long-term investments. This study offers a framework and rationale for sustainable heritage tourism marketing at the Rideau Canal and other heritage tourism sites around the world.

LITERATURE REVIEW

Marketing is a highly complex topic that holds an important place within tourism (Holloway, 2004). It is traditionally defined as a system involving the flow of knowledge, services, and values between producers and consumers (Middleton and Clarke, 2001). The heritage tourism literature contains an analysis of and application of the 'marketing mix' - a well-known concept often referred to as the "Four Ps" of product, price, promotion, and place. Product refers to an intangible or tangible service that is delivered to the consumer. In the case of heritage tourism, Boyd and Timothy (2006) argue that the market is brought to the product and that the product is really a by-product of the need to protect heritage for current and future generations. Price refers to the amount a customer pays for the product. Goeldner et al. (2000) explain that the price must satisfy customers and profit objectives. Admission is free at many heritage sites and this may or may not create a marketing advantage over competition. Promotion represents all marketing communications. In general, promotions communicate the key features and benefits of the product for consumers but it also includes the strategies and tools used for doing so: advertising, public relations, personal selling, and sales promotion. Place represents the location where the product can be purchased and it is commonly referenced in the marketing literature in conjunction with distribution. In the case of heritage sites, consumers are brought to the product through promotions that feature the sites as iconic and unique tourism destinations. This marketing mix has been widely debated in the literature and Boyd and Timothy conclude that it is not well-suited to heritage tourism. In the 1970's, Kotler and Zaltman (1971) published an influential article where they introduced the social marketing concept. It built on the classic marketing mix but it deferred short-term consumer satisfaction to long-term consumer welfare and it suggested that businesses include ecological and social considerations in product development and marketing. The argument is that marketers need to meet changing social and ethical responsibilities in order to protect the producer's long-term interests and to avoid failure.

Following closely on the coat-tails of Kotler and Zaltman's social marketing approach and particularly since the popular introduction of the sustainable development concept in 1987, 'green' marketing has emerged. Green marketing requires innovative product development and a marketing plan that is sensitive to the environmental ethics, morals, and demands of the consumer and the global community (Crane, 2000). Tourism has long recognized the value of "going beyond green" to incorporate a 'triple bottom line' approach to marketing. Central to this logic is the notion that environmental integrity can be maintained in the pursuance of market growth; this is the fundamental ethic of sustainable development.

In 1999, Fuller developed a sustainable marketing management framework designed to promote production and consumption practices that preserve environmental integrity. In 2005, Murphy (2005: 172) argued that the "contemporary interpretation of sustainable marketing is that it should deal positively with the ecological environment and be sensitive to the needs of future generations." He presents a sustainable marketing model that is an environmentally friendly adaptation of the traditional marketing mix. Jamal and Jamroz (2006: 168) also assume an environmental perspective, arguing that a sustainable marketing orientation "does not just satisfy the needs and wants of individuals - it strives to sustain ecosystems". While these articles emphasize an ethical basis for sustainable marketing - an important movement away from traditional and consumerist business and marketing models, both focus on a narrow 'environmental' interpretation of sustainability.

In an article published in the *Journal of Ecotourism*, Donohoe and Needham (2008) argue that sustainable marketing is particularly complimentary to the sustainable development priorities of ecotourism and sustainable tourism. They describe sustainable marketing on the basis of six principles that incorporate the triple bottom line of sustainable development. These principles capture the evolution from a traditional and narrow marketing perspective based on profit-maximization to a holistic perspective that is sensitive to the triple bottom line of sustainable development. In the tourism context, this perspective emphasizes the contemporary need to balance tourism profits and consumer satisfaction with the overall goal of society's wellbeing and to assume an alternative to 'business as usual' (Middleton and Hawkins, 1998). Enderle and Murphy (2009) argue that under the sustainable development rhetoric, marketers have a moral obligation to protect the environment through a socially sustainable pattern of consumption that limits negative impacts so as not to penalize future generations. Following this same rational, Chhabra (2009) proposed a sustainable heritage tourism marketing framework – the first of its kind to move from theory to practical priorities. The underlying premise of the model is to suggest that marketing decisions need to be guided by the conservation and preservation principles that underpin the traditional role of heritage institutions. The model includes eight interrelated components: mission, market segmentation, research, communication mix, local community involvement/benefits, partnerships, and preservation/conservation). Chhabra argues that the proposed model can serve as a management tool for guiding heritage managers toward long-term planning.

METHODOLOGY

The Rideau Heritage Route Tourism Association (RHRTA) – Ontario's newest destination marketing organization, was created in 2006 to bring tourism partners together to develop and deliver marketing programs that promote the Rideau Canal's arts, heritage, cuisine, agri-tourism and natural history experiences. RHRTA maintains an active internet-based communications portal and the organization's plans and reports are available for download. The RHRTA's Business Plan (2006) and Marketing Plan (2009) were downloaded in the fall of 2010 and content analysis was used to identify themes and subthemes in order to assess congruency between Chhabra's proposed sustainable heritage tourism marketing model and the RHRTA's policy framework. Content analysis is a technique for systematically and objectively identifying and categorizing communications themes or characteristics (Krippendorff, 2004). The content analysis was completed by two researchers and inter-coder and check-coding procedures were used to improve the accuracy and reliability of the analysis.

RESULTS AND DISCUSSION

In the sections that follow, RHRTA's marketing framework is critically assessed in light of each of the components of Chhabra's model.

Mission

The mandate of the RHRTA is to promote the Rideau Heritage Route (RHR), its municipalities and private sector partners by developing marketing, communications and promotional programs. Their mission is to "position the entire RHR Corridor as a tourism destination by promoting the region's authentic, arts, heritage, cuisine, agri-tourism, and natural history experiences" (RHRTA, 2006: 3). Simply, the RHRTA's role is to promote the destination, increase visitation, develop the industry and enhance its economic impact. While the organization's mission reflects generic DMO priorities, the mission statement fails to explicitly address the importance of sustainability. The Business and Marketing Plans fail to recognize and prioritize the importance of preserving the natural and cultural heritage assets upon which the tourism experience depends at the Rideau Canal. While environmental threats are recognized in the Business Plan, the mission statement and the directives that follow do not emphasize the magnitude of this threat and the importance of preservation through direct management actions such as product development and/or partner, visitor and community education.

Research: Market Segmentation and Environmental Analysis

As a major component of the Rideau Cultural Heritage Corridor project, a situational analysis was completed by Burnett Thorne Cultural Tourism (2006). It included a comprehensive assessment of the

natural and cultural heritage assets and supporting infrastructure, the tourism industry and cultural tourism market, as well as the strengths, weakness, opportunities and threats (SWOT analysis) to the success of tourism. This report was the first of its kind to address internal and external tourism opportunities and challenges as an important component of the River's heritage. The RHRTA Business Plan drew heavily from this analysis in order to establish its mandate, objectives and course of action. In preparation for the development of the RHRTA Marketing Plan, the organization initiated the Tourism Competiveness Study (2008) to identify product and service gaps as well as tourism development challenges and opportunities. Of interest is the identification of 'sustainable product development' as a significant challenge but an opportunity for marketing and best practice leadership. The study also updated the Rideau Cultural Heritage Corridor Situational Analysis market segmentation results by analyzing the most recent data. The study concludes that Rideau Canal visitation is growing and it is a "potential economic generator for the entire region" (RHRTA, 2008: 2). While the study does provide some suggestions for tourism development, the data was not comprehensive enough to inform a set of robust recommendations and guidelines. Where it was useful, was in its reconfirmation of the of the Corridor project findings regarding target markets, economic opportunities, and product development. It is also important to note that the RHRTA Marketing Plan has a provision for evaluation that includes the collection of visitation data from Rideau Canal land and water based visitors as well as from Statistics Canada reports. The data is to be used to evaluate the success of marketing initiatives and to identify shifts in visitation trends as they occur. The Marketing Plan also recommends that a Rideau Corridor Business Survey be completed so that a benchmark can be established for future research. Generally speaking, these aforementioned research investments explicitly and implicitly speak to the importance of research for policy development and industry sustainability. Ongoing research is needed to better understand the impact of World Heritage designation on visitation, competition, the local economy and politics.

Partnerships

According to Ballinger (1994), Director of Operations for the Rideau Canal, organizations cannot survive on their own and this is particularly true for organizations struggling to operate with limited resources. On the Rideau Canal, this has been true for many years but the changing economic, political, social, and environmental context have reinforced this truth. The analysis of the RHRTA business and marketing plans reveals that an active partnership model is in operation. The organization has three levels of partnership, namely government agencies, organizations, and businesses interested in furthering the objectives of the RHRTA. Partners are eligible to serve on the Board of Directors and on RHRTA committees, working groups, advisory councils, and task forces. Not only do partners have a stake in the organization and its governance, they benefit from the collaborative marketing initiatives, product development support, knowledge sharing and networking that are available through the organization. As previously mentioned, the RHRTA maintains an active internet-based communications portal. One of the key features of the portal is the 'Partner's Centre' where information for new and existing partners (secure log-in access to additional resources) can be accessed.

Local Community Involvement and Benefits

The RHRTA Business Plan identifies 'non-participation among communities' as a significant threat to the success of heritage tourism. The authors concur, but would like to add that it is a significant threat to the sustainability of the tourism industry and the Rideau Canal Corridor. Although this threat was identified early, the Business and Marketing Plans do not identify the importance of the community and they do not describe any strategies for engaging the community so that they can contribute to and benefit from the local heritage tourism industry. While local municipalities and business owners have been invited to participate, the policy framework falls short in identifying the role of the community. This is particularly important because heritage tourism relies on the willingness of the host community. The Canal is very much a part of the communities through which it travels (Ballinger, 1994). The communities depend on the Canal and tourism depends on the communities to directly and/or indirectly facilitate the visitor experience (e.g. farmers markets, cuisine, performing arts, public art, distinctive neighborhoods, historic sites, sense of place, decorative gardens, nature trails, interpretation). "Tourism plays an important role in the local communities and in the country" (Ballinger, 1994) and this relationship needs to be better articulated in the RHRTA policy framework.

Preservation and Conservation

The RHRTA policy framework makes little to no reference to the importance of preserving and conserving heritage tourism resources. In the ideal case, a sustainable heritage tourism marketing plan would explicitly reference the importance of these themes in a mission statement and it would also be articulated in its strategies and actions. The content analysis of the Business and Marketing Plans revealed no references to preservation or conservation. When the analysis was run with associated words such as 'environment', 'culture', 'nature', and 'heritage', the words did not appear at all or they did not appear in relation to the preservation/conservation themes.

The analysis indicates that there is some congruency between Chhabra's proposed sustainable heritage tourism marketing model and the marketing activities at the Rideau Canal. Partnerships are clearly an important component of a sustainable heritage tourism marketing model. In this case, marketing was not perceived as a stigma, but as a tremendous opportunity to benefit from promoting themselves as a World Heritage Designation (RHRTA, 2008). By extension, community involvement is also essential for marketing success. Much of the advertising positions the Rideau Canal against the backdrop of the unique character and people of the community where the attraction is found. It is essential to involve the local community in marketing initiatives so that they can contribute to and benefit from tourism activities. In both cases, Chhabra's model does not place enough emphasis on the importance of partnerships and community involvement for sustainable heritage tourism marketing and a successful heritage tourism destination.

Congruency was not present for the other components of Chhabra's model. The RHRTA policy framework satisfies the Mission component of Chhabra's model but it fails to make explicit the importance of preservation for heritage tourism management. In the case of Research, some research had been completed but the lack of baseline data and ongoing data collection activities throughout the Rideau Heritage Route Corridor suggests that the marketing of the Rideau Canal has yet to mature into a research-to-practice model. This was judged to be a missed opportunity and it is recommended that an agenda be developed. The Preservation component also revealed gaps in theory and practice. The RHRTA did not emphasize the importance of preservation and conservation in their policy framework or their marketing activities.

For the Rideau Canal World Heritage Site, Chhabra's model suggests that marketing should focus on: making preservation and conservation the primary objective; engaging in long-term strategic planning that it is informed by sustainable development principles; developing partnership networks; facilitating community collaboration and benefits; developing and operationalizing a research agenda; and communicating core values with target markets (including stakeholders). For the Rideau Canal, the integration of sustainable marketing components could produce desirable ends that are consistent with the requirements for World Heritage status and sustainable development.

CONCLUSION AND INDUSTRY SIGNIFICANCE

The analysis of the Rideau Canal is consistent with the mixed findings of sustainable marketing research. This study in combination with the literature, suggest reasons for both optimism and pessimism. From a demand perspective, the market for sustainable products is still limited in Canada and worldwide. Murphy (2005) argues that until consumer awareness and demand increase, demand for sustainable products in going to lag. However, the demand for heritage tourism continues to grow despite lagging demand for sustainable products. If we assume the McKercher and du Cros (2002) cultural tourist typology model, this means that the majority of the growth is coming from casual or sightseeing cultural tourists who are fundamentally ignorant of the destination and its heritage value. While the purposeful cultural tourist comprises a minority of heritage site visits, the centrality of cultural integrity in their quest for a deep cultural experience is driving a shift in the supply-side. Heritage managers are increasingly recognizing that sustainable management is the right thing to do regardless if it is the profitable thing to do. They are seeking guidance, models and tools for sustainability and they are establishing operational partnerships. While sustainability issues remain peripheral for most product marketers, the academic and practical interest in sustainable heritage tourism marketing suggests the beginnings of a paradigm shift. And, the Rideau Canal case study suggests that sustainability is growing in both the demand and supply sides of

the market. While there is certainly room for optimism regarding sustainable marketing at the Rideau Canal and other heritage sites around the world, there is still a long way to go before businesses and customers view sustainability as a standard operating procedure. To move the paradigm shift forward, Middleton and Hawkins (1998) provide a rationale for sustainable marketing. Their rationale is adapted here to provide industry leaders with a framework for justifying an internal shift towards sustainable heritage tourism marketing.

1. Demand Satisfaction: Demands for tourism experiences in increasingly sensitive natural and cultural environments are increasing. Marketing transparency ideal for attracting and satisfying customer demand. Tourism opportunities aligned with current demand trends (monitoring of satisfaction, demands, etc.).
2. Achieving Competitive Advantage: Focusing on delivery of sustainable outcomes and maintenance of heritage integrity and/or heritage status to provide competitive advantage over other tourism attractions.
3. Operational Costs May require investment upfront (e.g. human resources, technology) but evidence suggests long-term savings can be gained by developing sustainable marketing and management systems.
4. Positive Community Relations: Essential for partnership development and local community participation. Valuable for positive PR, for identifying community opportunities (participatory) and potential benefits, increased community-based interest and value for site, facilitating community-based investments in site (e.g. conservation).
5. Avoidance of Negative PR and Achievement of Positive PR: Negative PR inevitably leads to loss of customers but may also threaten heritage integrity/status. Negative PR avoided with sustainable marketing approach while positive PR [ideally] results.
6. Regulatory Compliance: In addition to heritage status requirements, an increasing number and complexity of regulations and protection measures are being applied (laws, regulations, voluntary codes of conduct, accreditation, and award schemes). Meeting standards ahead of compliance may confer competitive advantage internationally, nationally, and locally. Integrating sustainability into management planning facilitates compliance from the onset and communicates these values to stakeholders.
7. Preservation / Conservation: Sustainable marketing facilitates natural and cultural heritage preservation through ethical standards, long-term planning, transparent communications, best-practice reporting, and visitor education programs.

The fundamental challenge of marketing is that the majority of marketing theory and application focuses on what happens before the product is consumed. The emphasis has long been on the Four P's for attracting customers to products, pricing them accordingly, promoting the product or service, and making products available when and where they are demanded. He argues that "sustainable marketing requires that we spend an equal amount of time, if not greater amount of time and energy on what happens after the individual or business consumes the product" (Murphy, 2005: 190). This requires additional upfront costs to better understand the market and its impacts on the natural, cultural and economic environments (environmental analysis, market segmentation and research) so that marketing planning and management can be informed by operational realities and savings can be gained over the long-term. It also requires the development of a research agenda to monitor outcomes such as visitation and partnerships are fundamental for monitoring environmental, social, and economic impacts of heritage tourism. Given that sustainable marketing is a relatively new concept and that there are few case studies that explore the concept in application, it is hoped that more progress will result from the ongoing interest in and applied study of the concept. The marketing system continues to evolve and show great responsiveness to changes in both the supply and demand sides and it is the opinion of the authors that there is great reason for optimism that heritage tourism can lead by example with a sustainable heritage

tourism marketing agenda. Heritage tourism managers have a vital role to play and they need to seek to become champions of a new sustainable heritage tourism paradigm.

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