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Reframing heritage management: The role of marketing education through cultural products and direct investment in culture

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Abstract

Cultural heritage professionals increasingly face the challenge of combining preservation with innovation, engagement, and sustainability in fast-changing contexts. This study explores how marketing education can support heritage professionals in aligning cultural preservation with economic and social sustainability. As public funding diminishes and audience expectations evolve, the need for strategic competencies in communication, audience development, and partnership-building becomes increasingly urgent. The study adopts a conceptual review methodology, integrating a structured thematic analysis of international literature and comparative case studies. Sources were selected based on their relevance to cultural products (CPs), direct investment in culture (DIC), and professional training within the heritage sector. Recent literature highlights the growing interdependence between cultural heritage, digital innovation, and sustainable development. However, few studies have systematically explored how marketing education contributes to this nexus – particularly through capacity-building for heritage professionals. This study identifies strategic marketing as a critical skill set for professionals managing CPs and DIC frameworks. Five key competency domains are outlined: audience engagement, digital literacy, strategic planning, ethical communication, and interdisciplinary collaboration. Case studies illustrate that institutions equipped with marketing expertise consistently outperform others in audience outreach, funding diversification, and community impact. To address this need, marketing education should be embedded in heritage curricula and institutional policy to strengthen professional capacity. The study proposes a phased implementation framework that emphasizes partnerships with academic institutions, hybrid learning models, and inclusive access. It offers a structured synthesis of how marketing education can serve as a lever for institutional resilience and stakeholder alignment in heritage management, providing actionable recommendations across geographic and governance contexts.

Keywords: Cultural heritage management; Cultural products; Direct investment in culture; Marketing education; Public–private partnerships; Strategic competencies

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1. Introduction

Cultural heritage serves as a dynamic link between the past and the present, encompassing both the tangible and intangible legacies that shape human civilization and cultural

identity. Beyond preservation, heritage promotes global solidarity by fostering intercultural dialog and a shared historical consciousness. However, contemporary challenges – ranging from financial constraints and climate change to changing audience expectations – demand adaptive, forward-looking management strategies.[1]

Conventionally, heritage management has focused on conservation and academic study. However, as stated by Trivyzadakis,[2] a shift is needed – cultural heritage must become an active contributor to societal development, moving beyond static representation to a more engaging and sustainable use. In this context, there is a growing need for integrative strategies that address both cultural and economic sustainability.

The present study explores two such frameworks – cultural products (CPs) and direct investment in culture (DIC) – as tools for innovating heritage management strategies. CPs transform cultural assets into participatory experiences, while DIC offers long-term financial models through public–private partnerships and innovation-oriented funding. Central to their effectiveness is marketing education, which enables heritage professionals to engage audiences, attract investment, and align preservation with evolving societal needs.

2. Methodology

This article adopts a conceptual review methodology, integrating a thematic analysis of literature with illustrative case synthesis. Sources were selected based on their relevance to marketing education, cultural heritage management, CPs, and DIC. The review focused on peer-reviewed articles, policy reports, and institutional case studies published between 2010 and 2024, identified through targeted keyword searches in Scopus, Web of Science, and Google Scholar. Case studies were included to reflect a diversity of geographic contexts and implementation models, highlighting how marketing competencies intersect with heritage sustainability objectives. Although no empirical data collection was conducted, the selection, analysis, and comparison of literature aimed to identify strategic patterns, competency gaps, and transferable frameworks. This methodological approach is intended to support policy and curriculum development by offering a structured synthesis of current research and practice.

3. Understanding cultural heritage: Concepts, values, and implications

3.1. Material and immaterial dimensions of cultural heritage

Cultural heritage, as conceptualized by Raj *et al.*,[3] encompasses the historical, artistic, and social accomplishments of societies, serving as a repository of collective identity and memory. It is traditionally divided into two interrelated categories: tangible and intangible heritage. Tangible cultural heritage refers to material assets – such as monuments, tools, manuscripts, and artworks – that physically represent the ingenuity, rituals, and values of past civilizations.

Lenzerini[4] offers a complementary view, emphasizing that intangible cultural heritage consists of non-physical forms of cultural expression, including oral traditions, spiritual practices, festivals, music, and traditional knowledge systems. These elements do not merely coexist with physical artifacts – they actively contextualize and animate them.

This study adopts an integrative understanding of cultural heritage, recognizing that both dimensions are essential for safeguarding the continuity of cultural identity. As Blakely[5] affirms, their interplay constructs a multidimensional historical narrative, ensuring that heritage preservation encompasses both physical conservation and the transmission of living traditions to future generations.

3.2. Cultural heritage as hyper-value: Beyond symbolism to economic impact

Labadi[6] introduces the concept of "hyper-value" to describe cultural heritage's multidimensional significance – symbolic, historical, and economic – extending beyond its physical attributes. This framework underpins the present analysis by highlighting heritage's ability to shape collective memory, foster social cohesion, and drive development. Symbolically, heritage forges a tangible connection between the present and the past, anchoring community identity. Historically, it offers interpretive tools for understanding societal evolution.

Economically, cultural heritage plays an increasingly strategic role. Du Cros and McKercher[7] emphasize that cultural tourism has become a high-yield sector, invigorating local economies by generating employment and stimulating service industries. The United Nations Educational, Scientific, and Cultural Organization (UNESCO) World Heritage Sites are pivotal in regional growth.[8] Nilson and Thorell[9] further argue that cultural heritage is a foundational asset for creative industries – such as design, fashion, and media – by inspiring contemporary innovation through historic narratives.

This study supports the view that cultural heritage enriches lifelong learning and public engagement, with economic returns amplified through effective public–private partnerships. These partnerships align investment with preservation through adaptive reuse and restoration.

As suggested by Shabani *et al*.,[10] the symbolic and economic functions of heritage intersect in promoting intercultural dialog. When effectively leveraged, heritage can serve as a dynamic force for sustainable development and global cooperation.

3.3. Theoretical foundations for strategic heritage management

This article is informed by three interrelated theoretical frameworks that structure and guide the analysis: Strategic marketing theory,[11] stakeholder theory,[12] and public value theory within cultural policy.[13] Together, these frameworks provide critical insights into how heritage institutions navigate external pressures while maintaining cultural integrity.

Strategic marketing theory provides the conceptual basis for aligning institutional missions with audience expectations and market dynamics. It emphasizes segmentation, positioning, and campaign design as tools not only for outreach but also for ensuring institutional sustainability. Stakeholder theory contributes an ethical and operational lens by focusing on how cultural institutions balance the often-competing expectations of funders, local communities, tourists, scholars, and government bodies. Public value theory reframes heritage as a co-created societal good – one that must continuously demonstrate relevance, inclusivity, and long-term impact to justify ongoing investment and attention.

Within this framework, the integration of marketing competencies is understood not as a commercial deviation, but as a strategic necessity. It enables heritage professionals to mediate between preservation imperatives and stakeholder value creation, thereby positioning marketing education as a core instrument of sustainable cultural governance.

3.4. The evolution of heritage management: From humanism to digitalization

The evolution of cultural heritage management reflects changing philosophical, political, and technological paradigms over centuries. Rooted in the Renaissance, the early conceptualization of heritage was driven by humanism and the rediscovery of classical antiquity. As observed by Sam and Chukwujekwu,[14] this period marked the emergence of systematic preservation as an intellectual pursuit, laying the foundation for scholarly conservation methods that framed artifacts as vehicles of historical and artistic insight.

In the 18th and 19th centuries, heritage was increasingly linked to nation-building. According to Simmons,[15] national museums – such as the British Museum and the Louvre – embodied a shift toward institutionalized heritage stewardship. These institutions democratized access to curated histories, fostering a sense of collective identity through curated material culture. Heritage became instrumentalized as a means to assert cultural sovereignty and continuity.

The 20th century marked the formalization of international heritage norms. According to Tucker and Carnegie,[16] this period was transformative due to the emergence of multilateral frameworks that introduced global standards. The 1964 Venice Charter, highlighted by Szmygin and Skoczylas,[17] repositioned monuments within their cultural and contextual significance, redefining restoration practices beyond esthetics. At the same time, UNESCO's 2003 Convention brought intangible heritage – such as rituals, knowledge systems, and traditions – to the forefront, recognizing it as equally vital to safeguarding cultural continuity.[18]

Technological advancements have further reshaped heritage practice. Trivyzadakis[19] highlights the impact of three-dimensional (3D) scanning, virtual reality (VR), and digital archiving in expanding preservation frontiers. Underhill[20] cites initiatives like CyArk that virtually document threatened sites, while Pansoni *et al*.[21] demonstrate artificial intelligence (AI)'s emerging role in analyzing structural vulnerabilities and enabling immersive engagement with cultural materials.

Nonetheless, heritage management continues to face pressures in an increasingly globalized context. As noted by Siliutina *et al*.,[22] institutions such as UNESCO promote collaborative frameworks to mediate tensions between preservation and accessibility. This study adopts the view that understanding this historical trajectory is essential for designing contemporary approaches that integrate both classical conservation ethics and the demands of an interconnected digital society.

4. From tradition to transformation: Evolving heritage management models

4.1. Research–protection–prominence (RPP): Classical foundations and limitations

The RPP model represents a foundational framework in cultural heritage management, structuring the field around the interconnected functions of academic inquiry, physical safeguarding, and public visibility.[23] According to the Organization for Security and Co-operation in Europe,[24] the model comprises three core pillars:

(i) Research: This involves the systematic examination of heritage assets to reveal their historical, artistic, and cultural dimensions. It establishes the evidence base

necessary for credible heritage interpretation and planning

(ii) Protection: This focuses on mitigating threats such as environmental degradation, conflict, and neglect, aiming to ensure the long-term preservation of material culture

(iii) Prominence: This includes strategies for raising awareness and fostering public engagement through exhibitions, media campaigns, and educational outreach.[25]

While the RPP model has historically guided institutional practice, it has been increasingly criticized for its reactive orientation and limited adaptability. It often prioritizes conservation over innovation, leaving gaps in its ability to anticipate or respond to current global dynamics. Omayio *et al.*[26] argue that the model underperforms in addressing contemporary challenges such as mass tourism, urban encroachment, and climate volatility.

This study supports the view that the RPP model, while valuable, requires significant reconfiguration. In particular, the absence of integrated approaches to digital technology, audience inclusivity, and sustainability undermines its capacity to function as a forward-looking model in today's rapidly changing heritage landscape.

4.2. Rethinking priorities: Accessibility, technology, and sustainability in heritage management

To meet contemporary demands, cultural heritage management must evolve beyond conventional models by incorporating three interdependent dimensions: accessibility, technology, and sustainability. These dimensions are not supplementary – they are foundational to repositioning heritage as a socially inclusive, digitally engaged, and environmentally responsible field.

(i) Accessibility: As stated by Bellanca *et al.*,[27] ensuring both physical and digital access is essential for equity in cultural participation. They support this principle, noting that initiatives such as multilingual virtual tours, inclusive exhibition design, and mobile learning tools are vital to democratizing heritage and reaching underrepresented audiences.

(ii) Technology: Poulopoulos and Wallace[28] illustrate how digital innovation transforms heritage engagement. From AI-powered artifact restoration to 3D scanning and immersive VR, these tools enable new forms of interaction while supporting conservation, reinforcing the view that technological integration is no longer optional but essential to relevance

(iii) Sustainability: Pisolkar[29] underscores that long-term viability depends on aligning heritage management with ecological and economic goals. Green restoration methods, sustainable tourism models, and public–private financing mechanisms are presented as viable pathways for ensuring responsible stewardship.

Together, these dimensions form the basis for a more resilient, inclusive, and future-ready heritage management paradigm.

4.3. Toward a holistic, participatory, and future-oriented model

A holistic approach to heritage management builds on the RPP model while incorporating accessibility, technological engagement, and environmental sustainability as co-equal priorities. This integrated strategy, advocated in this study, reflects a shift from reactive conservation to proactive cultural stewardship aligned with broader societal goals.

Rather than compartmentalizing heritage work, this model promotes synergies among researchers, technologists, policymakers, and designers. Mendoni[30] emphasizes that cross-disciplinary collaboration enhances institutional capacity to interpret, preserve, and communicate heritage without compromising authenticity. This study supports this perspective, framing such partnerships as essential for sustained relevance.

Public engagement is another critical axis. Trivyzadakis[2] illustrates how participatory decision-making strengthens cultural legitimacy by ensuring that heritage management reflects community values. A participatory ethos is thus supported, positioning community co-ownership as a driver of both resilience and policy responsiveness.

Sustainability acts as the strategic underpinning. Previous studies by Hayat and Ibrahim[31] and Madime[32] highlight that green technologies, ethical tourism, and innovative financial models are reshaping the field. These developments are interpreted not merely as trends but as necessary structural adjustments for heritage institutions navigating global pressures, economic volatility, and cultural fragmentation.

5. CPs: Bridging heritage and society

5.1. Defining CPs: Functions, formats, and strategic value

CPs represent a strategic innovation in heritage management, designed to reconcile the goals of preservation, public engagement, and sustainable development. Parkhomenko and Berezovska[33] define CPs as outputs derived from cultural assets that repackage heritage into experiential or consumable formats – ranging from immersive tours and digital reconstructions to interactive tools, reinterpretive art, and heritage-inspired merchandise. They adopt a functionalist view of CPs, emphasizing their capacity to recontextualize heritage in accessible, pluralistic forms.

Apostolakis and Dimou[34] argue that CPs serve as dynamic mediators, adapting heritage narratives for diverse audiences. Through formats such as VR tours, CPs transcend physical constraints, enabling global engagement with sites otherwise inaccessible. Locally produced replicas and creative merchandise offer tangible links to heritage, fostering both emotional and cognitive connections.

Beyond cultural engagement, CPs contribute to heritage sustainability by generating financial resources. As noted by Aiello and Cacia,[35] income streams from CP sales, tourism, and educational programs reinforce conservation efforts and support local economies. This perspective underscores the potential for CPs to align cultural value with economic viability, helping to reframe heritage management as an ecosystem of interaction, rather than a static domain of preservation.

5.2. Case studies of CPs: Digital innovation and community impact

Strategic CP initiatives illustrate how innovation and preservation can reinforce one another. These examples, selected for their scalability and multidimensional impact, reflect how CPs can foster global access, economic resilience, and cultural continuity:

(i) The Smithsonian Institution provides a leading model for the digitalization of cultural heritage. As reported by Rogala *et al*.,[36] its interactive online exhibitions have expanded global access while reducing physical wear on collections. This case highlights how virtual tools support conservation, broaden outreach, and generate revenue – positioning digital CPs as long-term assets rather than as supplementary tools

(ii) The Timbuktu Manuscripts Digitization Project in Mali successfully preserves fragile manuscripts through digitization. Funded through public–private partnerships, this initiative demonstrates the potential of CPs to combine scholarly access, public education, and financial viability – particularly in high-risk environments[37,38]

(iii) In Greece, the Acropolis Museum and Museum of Cycladic Art employ digital reconstructions and virtual tours to reframe ancient artifacts for contemporary audiences. As noted by Zhang,[39] these CPs integrate educational storytelling with immersive technologies, exemplifying how museums can broaden impact without compromising authenticity

(iv) The Terracotta Army Digitization and VR Project in China, as analyzed by Ma *et al*.,[40] utilizes 3D scanning and VR to make an iconic site accessible worldwide. The project's funding model, based on licensing and sponsorships, supports ongoing preservation – reinforcing CPs as tools for both cultural diplomacy and financial sustainability.

Zhang[39] further emphasizes that collaborations with tech firms – particularly those involving augmented reality – can animate historical narratives in real-world contexts. These partnerships illustrate how CPs not only preserve heritage but also reintroduce it into daily life, expanding its relevance across generations.

5.3. Designing, developing, and disseminating CPs

The development of CPs requires a systematic, multi-stage approach that combines cultural insights with creative and technological development. This structured process is essential for ensuring that CPs preserve cultural authenticity while resonating with modern audiences.[41]

(i) Research and conceptualization: The process begins with identifying culturally significant elements that can be translated into meaningful products. Barlie and Saviano[42] emphasize that this phase requires rigorous analysis of the symbolic, historical, and artistic dimensions of heritage assets. Strategic selection is key, as not all artifacts lend themselves to transformation. Rovuma[43] supports the view that only culturally resonant elements should be advanced into production formats such as replicas, apps, or digital exhibits

(ii) Design and development: Interdisciplinary collaboration is central to this phase. Wróblewski[44] emphasizes the value of combining heritage expertise with creative design and technology. In addition, Pasikowska-Schnass and Lim[45] note that AI-driven modeling and algorithmic generation allow for high-fidelity reproductions and immersive digital experiences, enabling cultural storytelling at new levels of accuracy and scale.

(iii) Marketing and promotion: Effective dissemination is vital for impact. Chen[46] notes that marketing strategies must bridge emotional resonance and information. Katifori *et al*.[47] highlight how emotional storytelling, supported by data analytics and social media, expands CP accessibility and customizes content for diverse demographic groups

(iv) Evaluation and adaptation: CP development does not end at launch. Li *et al*.[48] advocate for iterative design informed by user data. Audience feedback, engagement analytics, and digital usage metrics are continuously assessed to refine both the product and its outreach strategy, ensuring long-term impact and sustainability.

5.4. Marketing education as an enabler of CP innovation

Marketing education plays a pivotal role in equipping heritage professionals with the skills needed to transform

cultural assets into accessible, engaging, and economically sustainable CPs. These competencies are increasingly recognized as foundational – rather than optional – for enabling cultural institutions to navigate the intersection of preservation, audience demand, and financial viability. As Mandal[49] notes, marketing skills empower professionals to strategically engage with the dynamics of culture, commerce, and technology.

Audience engagement is a critical learning domain. Petousi *et al.*[50] argue that training in storytelling enhances emotional connectivity with diverse publics. Building on this, the present study asserts that narrative-based approaches do more than entertain – they personalize heritage, making it relevant to audiences across generational and geographic divides. Furthermore, marketing education in data analytics enables heritage professionals to segment audiences, tailor messaging, and maintain both cultural authenticity and responsiveness to public interests.

Interdisciplinary collaboration is another domain where marketing education yields a significant impact. Wróblewski[44] emphasizes the role of cross-sector partnerships between cultural experts, designers, and technologists in fostering innovation. Building on this perspective, such collaborations can be seen not merely as beneficial but as essential for the co-creation of high-quality CPs – such as educational games, immersive mobile apps, or interactive museum installations.

Digital fluency also emerges as a non-negotiable competency. Liang *et al.*[51] demonstrate that social media platforms – such as Instagram, TikTok, and YouTube – function as both promotional tools and narrative ecosystems.[51] Accordingly, marketing education must equip professionals to leverage these platforms strategically – not only to increase visibility but also to democratize access and foster inclusive participation in heritage discourse.

Taken together, these competencies reflect a broader shift in cultural heritage management – from preservation-centered to public-centered logic. This study suggests that embedding marketing education in professional development frameworks is critical for producing CPs that are both culturally respectful and strategically impactful.

6. DIC: A sustainable approach

6.1. Defining DIC: Preservation, profit, and strategic investment

DIC represents a funding mechanism that combines cultural stewardship with financial sustainability. Unlike traditional models based on subsidies or donations, DIC encourages institutional and private investments that yield both cultural and economic returns. Rather than serving solely as an alternative financing option, DIC is increasingly understood as a strategic redefinition of how cultural heritage is preserved, governed, and mobilized.

Direct investments in culture funds are typically channeled into restoration projects, digital infrastructure, and workforce development, enhancing both resilience and institutional capacity. The European Observation Network for Territorial Development[52] and Pickerill[53] describe DIC as a "catalytic strategy" capable of rebalancing policy frameworks by aligning investment logic with cultural goals.

To maximize effectiveness, DIC requires data-driven decision-making. Loseva *et al.*[54] emphasize the role of metrics such as visitor engagement, return on investment, and community participation in assessing performance. Building on this, analytics platforms (e.g., Tableau, Google Analytics) can be employed to refine messaging, monitor impact, and optimize stakeholder alignment.

Policy support further amplifies DIC's value. Donelli *et al.*[55] cite Italy's "Art Bonus" as a case in which fiscal incentives mobilized private contributions to heritage. From a policy perspective, integrating marketing education and digital competency into DIC strategies ensures not only capital input but also the internal capacity to manage it effectively.

6.2. Reframing cultural funding: Why DIC matters today

In an era of austerity and budgetary fragmentation, DIC offers a proactive, sustainable approach to heritage financing. Pickerill[53] notes that DIC repositions cultural institutions as active economic agents, reducing dependency on static public funding streams. Building on this premise, DIC can be understood not merely as a tool of financial necessity, but as a catalyst for institutional transformation.

By enabling investment in digitization, infrastructure renewal, and outreach, DIC addresses systemic capacity gaps. Paul and Feliciano-Cestero[56] highlight how DIC contributes to community regeneration and cultural entrepreneurship. These social and economic externalities may be considered not secondary benefits, but central indicators of success in DIC – enabled projects.

Moreover, DIC enhances governance through stakeholder alignment. Boniotti[57] emphasizes that public–private–community partnerships create participatory decision-making processes and shared accountability. Reinforcing this view, such alignment not only attracts resources but also strengthens the legitimacy and adaptability of heritage institutions in a fast-changing landscape.

In sum, DIC shifts the role of heritage actors from passive custodians to dynamic innovators capable of linking identity formation, economic activation, and public legitimacy under a shared strategic framework.

6.3. Evaluating DIC: Opportunities, risks, and global practices

DIC has emerged as a structured solution to the financial and operational challenges facing the heritage sector. DIC is framed as a forward-looking model involving cross-sectoral capital engagement through public–private partnerships, philanthropic channels, and cultural venture funds. While this article supports this evolution, it emphasizes that successful implementation depends on a clear value narrative, professional competencies, and ethical governance.

Key opportunities presented by DIC include:

(i) Sustainable financing: DIC generates recurring revenue streams, enabling institutions to pursue long-term planning and effective risk management
(ii) Economic stimulation: Investments activate adjacent sectors such as tourism, crafts, and the creative industries. This study underscores the importance of this multiplier effect for embedding culture within inclusive and resilient development
(iii) Inclusive access: Digital infrastructure supported through DIC can broaden outreach to underserved communities, advancing social equity alongside conservation.

However, there are several risks associated with DIC, such as:

(i) Over-commercialization: Market-driven logic may erode authenticity. Without ethical safeguards, there is a risk that financial interests will overshadow cultural missions
(ii) Stakeholder tensions: Balancing investor expectations with public interest requires strong governance frameworks and transparent negotiation protocols
(iii) Distributional inequity: As warned by Siliutina *et al.*,[22] communities closest to heritage sites may be excluded from the benefits unless equity is built into DIC design.

Illustrative cases support this duality, including:

(i) The Colosseum Restoration in Italy, co-funded by luxury brand Tod's, demonstrates a combination of corporate social responsibility and authentic conservation[58]
(ii) Adaptive reuse of heritage buildings in the Netherlands illustrates how DIC can preserve identity while generating economic utility[59]
(iii) In Bolivia, Baroque music festivals tied to Jesuit missions sustain both conservation and community income.[60]

These cases confirm that, when ethically managed and contextually adapted, DIC acts as both a development engine and a legitimizing force in heritage policy.

To synthesize these findings, Table 1 contrasts DIC with conventional funding models across key operational, ethical, and impact-related dimensions.

As outlined in Table 1, the shift from traditional funding to DIC reflects a broader evolution in cultural heritage management. DIC fosters sustainable, inclusive growth by aligning economic objectives with conservation ethics. While it introduces new risks – such as over-commercialization – these can be mitigated through strong governance, ethically grounded marketing education, and community-based co-ownership models. Thus, DIC presents not just an alternative funding mechanism, but a scalable, globally adaptable strategy for future-oriented heritage policy.

6.4. Strategic competencies for implementing DIC

Marketing education plays a critical role in enhancing the effectiveness and sustainability of DIC. This study positions it as a capacity-building tool that empowers heritage professionals to attract, manage, and align investment with

Table 1. Comparative analysis of traditional funding models and direct investment in culture

Aspect	Traditional funding	Direct investment in culture
Funding continuity	Often short-term, project-based, dependent on grants or public budgets.	Long-term, strategic investment supporting sustainability.
Economic contribution	Limited economic ripple effect, indirect returns.	Drives local growth, job creation, and sectoral diversification.
Audience engagement	Restricted by institutional outreach capacity.	Enhanced through digital innovation and market-oriented strategies.
Governance model	Top-down management, bureaucratic structures.	Collaborative governance including public–private–community partnerships.
Risk of Commodification	Lower risk but sometimes culturally disconnected.	Higher risk of commodification if not ethically managed.
Community benefit	Often symbolic or educational.	Direct financial, social, and cultural benefits to local populations.

long-term cultural and financial goals. Effective marketing training bridges the gap between preservation mandates and economic imperatives.[46]

A key competency developed through marketing education is strategic narrative framing. Napolitano and De Nisco[61] highlight that professionals trained in this area can communicate the dual value – intrinsic and economic – of cultural assets. They further emphasize that this skill is central to mobilizing support from investors, policymakers, and communities alike. Effectively demonstrating that a conservation effort both safeguards heritage and generates tourism revenue enhances its appeal to funders.

Stakeholder engagement is another core focus. Hayat and Ibrahim[31] argue that heritage professionals with marketing expertise are better equipped to form cross-sector alliances. According to them, co-branded campaigns and integrated messaging serve as strategies to advance both cultural awareness and financial viability, thereby strengthening the implementation of DIC.

Digital marketing proficiency strengthens these strategies. Carignani *et al.*[62] demonstrate that platforms such as Google Ads and social media – combined with analytics tools – enable targeted outreach, campaign optimization, and sustained audience engagement. They further emphasize that predictive analytics can refine DIC messaging in real time, increasing return on investment and enhancing cultural visibility.

Crucially, marketing education also instills ethical reflexivity. Kreuzbauer and Keller[41] argue that training must include sensitivity to cultural authenticity and community representation. They emphasize the importance of balancing commercial success with cultural integrity to ensure that DIC initiatives remain inclusive, credible, and socially responsible.

7. Marketing education: Equipping heritage professionals

7.1. Strategic marketing: A core competency in heritage governance

In the context of shrinking budgets and increasingly fragmented public attention, heritage institutions must adopt new strategic frameworks to remain relevant. Marketing is increasingly regarded as essential – not optional – for bridging cultural preservation with audience engagement and financial sustainability. As Taçon and Baker[1] assert, traditional approaches centered exclusively on conservation cannot respond to current societal dynamics.

The transformation of audience expectations reinforces this need. Hadley[63] states that digital fluency and global exposure have created publics that demand personalized, immersive, and participatory heritage experiences. In response, heritage professionals must develop competencies in audience segmentation, digital storytelling, and interactive outreach through platforms such as social media and virtual events.

Moreover, the operationalization of public–private partnerships and DIC hinges on the ability to communicate heritage's value in economic terms. Hadley[12] notes that failure to articulate this dual value proposition can limit both audience engagement and investment. Data-driven narratives are therefore indispensable for sustainable heritage financing.

Despite its strategic significance, marketing remains largely underrepresented in most heritage training programs. As Cerquetti and Ferrara[13] argue, curricula tend to prioritize technical conservation over engagement and strategy. This underscores the need to integrate tailored marketing education into professional development frameworks. Such integration represents not merely a skills upgrade – it constitutes a structural reform essential for navigating evolving audience profiles, attracting diversified funding, and sustaining cultural relevance.

7.2. Key competencies for heritage professionals

In response to shifting audience expectations, digital disruption, and a competitive funding landscape, heritage professionals must acquire a multidimensional set of marketing competencies. These skills are essential not only for audience engagement but also for navigating funding models such as DIC. This section draws on current literature and identifies five core skill domains necessary for contemporary heritage governance.

7.2.1. Strategic marketing

Agic *et al.*[11] emphasize that strategic planning aligns institutional missions with audience needs and external market conditions. Building on this perspective, campaign design, brand positioning, and priority-based resource allocation can be understood as foundational for translating cultural value into both public relevance and institutional viability. Strategic marketing is thus essential for heritage professionals seeking to communicate value beyond preservation.

7.2.2. Audience analysis and engagement

According to Zins and Abbas Adamu,[64] audience segmentation and behavioral insights are central to designing resonant narratives. Building on this view, understanding emotional, cultural, and generational differences is key to expanding participation – particularly among marginalized

groups. Competency in this domain ensures that CPs and DIC initiatives reflect pluralistic, inclusive values.

7.2.3. Digital tools and analytics

Studies conducted by Hayat and Ibrahim[31] and Harisanty *et al.*[65] highlight the indispensable role of digital platforms and analytics in modern heritage management. Building on this view, training in tools such as Power BI, Google Analytics, and R enables professionals to monitor engagement in real-time, optimize content delivery, and apply predictive modeling to campaign design.

7.2.4. Ethical marketing and cultural sensitivity

Holtorf and Högberg[66] argue that ethical integrity must guide marketing within the heritage sector. Reinforcing this view, professionals are expected to balance visibility and revenue goals with cultural authenticity, historical responsibility, and community inclusion. Ethical reflexivity should be taught not as a soft skill but as a core competency that safeguards institutional legitimacy.

7.2.5 Collaboration and innovation

According to Daldanise,[67] cross-sector partnerships increase the impact and resilience of cultural initiatives. Building on this insight, interdisciplinary collaboration is not only valuable but essential for scaling innovation and integrating diverse perspectives into both CP and DIC projects. Joint efforts between cultural managers, technologists, designers, and financial experts create synergies that enhance project longevity and public impact.

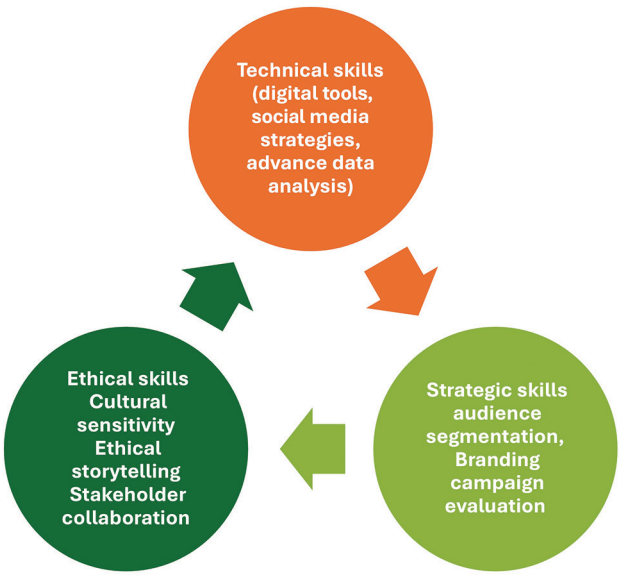

Figure 1. Integrated skill domains in marketing education for heritage professionals
Abbreviations: AR: Augmented reality; VR: Virtual reality.

These competencies, summarized in Figure 1, support the broader goal of the present study: to demonstrate how marketing education can serve as a catalyst for cultural sustainability. These core competencies provide professionals with both the mindset and the technical skills to manage change, scale impact, and maintain heritage relevance in an increasingly complex global environment.

7.3. Innovative models for teaching marketing to heritage professionals

Delivering marketing education in the context of heritage management requires innovation not only in content but also in format. To be effective, training programs must balance accessibility, relevance, and applicability to empower heritage professionals across diverse institutional and geographic settings. Three delivery approaches – such as digital, cross-disciplinary, and lifelong learning – emerge as particularly effective solutions.

7.3.1. Online and hybrid learning programs

Digital education models address constraints of time, location, and institutional resources. According to Gamage *et al.*,[68] platforms offering asynchronous modules, live webinars, and virtual workshops create interactive learning environments suited for working professionals. This study supports this model, particularly when courses are tailored to heritage sector needs such as digital engagement, audience analysis, and marketing analytics.

7.3.2. Collaborative workshops and cross-disciplinary training

Training initiatives that integrate heritage professionals with marketing specialists, designers, and technologists foster interdisciplinary fluency. Ahsan[69] emphasizes the value of problem-based learning through real-world scenarios. Building on this, simulation-based learning – such as investor pitch role-plays or campaign planning for CPs – can serve as a bridge between theory and applied practice.

7.3.3. Lifelong learning and professional development

Marketing education must be understood as a continuous process. Achille and Fiorillo[70] highlight the importance of micro-credentials, academic–industry partnerships, and open-access resources. They further argue that inclusive models – like the United Kingdom's "Skills for the Future" program[71] – are crucial for democratizing access. These initiatives not only build individual capacity but also diversify the professional ecosystem, bringing broader cultural perspectives into heritage interpretation and marketing strategies.

Taken together, these approaches offer a flexible and future-oriented framework for capacity building, enabling heritage professionals to remain adaptive, collaborative,

and responsive to the evolving landscape of cultural engagement and investment.

7.4. Impact of marketing education on heritage management

Marketing education significantly reshapes the cultural heritage sector by converting theoretical insights into practical outcomes that benefit preservation, audience engagement, and financial sustainability. It is argued that marketing competencies are not merely supplementary but are also foundational to modern heritage governance, as evidenced by a series of international examples that demonstrate both cultural and economic impact.

In France, the Louvre Museum's digital marketing strategy illustrates how storytelling and platform integration can revitalize audience connections. Corona[72] documents how behind-the-scenes narratives and curated Instagram content have enhanced visibility, particularly among younger, global demographics. This model presents a scalable approach for engaging new audiences while preserving institutional identity.

In the United Kingdom, the National Gallery's "Artemisia" campaign used audience segmentation and targeted outreach to achieve record attendance.[73] This case demonstrates that data-literate professionals can fine-tune heritage messaging, aligning programming with audience interests to amplify impact.

Nigeria's "Reclaiming History" project showcases how digital tools – when guided by culturally sensitive storytelling – can reclaim narratives disrupted by colonialism. Kohol and Adeleke[74] illustrate that professionals with marketing training can develop 3D and augmented reality content to reconnect displaced artifacts with global publics.

In China, the Terracotta Warriors Virtual Experience highlights the financial benefits of immersive technologies. According to Zhang *et al.*,[75] this initiative reduced physical strain on heritage sites while increasing revenue. Similarly, Peru's Machu Picchu virtual reconstruction achieved dual goals of educational outreach and commercial licensing, demonstrating the adaptability and scalability of digital CPs.[76]

The Smithsonian Institution's outreach programs further support the case for embedding marketing education into institutional practice. As reported by Rogala *et al.*,[36] interactive digital exhibits and webinars enhanced visibility and attracted private sponsorship, reinforcing the connection between audience engagement and diversified funding sources.

These cases reflect broader policy trends. In Australia, digital marketing education has become a mandatory component for recipients of federal heritage funds.[77] Such policies exemplify how national strategies can institutionalize marketing competencies across the cultural sector. Mandating annual reporting on audience growth and funding diversity would further incentivize marketing integration, ensuring that heritage institutions remain responsive, inclusive, and financially resilient.

8. Practical framework for implementation

8.1. From vision to practice: Embedding marketing in heritage institutions

According to Parowicz,[78] integrating marketing education into cultural heritage management requires a structured approach that is tailored to the sector's specific operational and institutional contexts. As shown in Figure 2, the process comprises interconnected stages – from identifying training needs to evaluating outcomes – to ensure strategic, adaptive, and impact-driven implementation.

Done and Aitchison[79] argue that cultural institutions and academic bodies must embed marketing education within broader professional development frameworks. Aligning curricula with sector-specific priorities – such as audience engagement and investment attraction – positions marketing not as a peripheral concern but as a core institutional competency. When integrated into strategic planning processes, this shift fosters long-term capacity building and institutional resilience.

Vegheș[80] supports the development of tailored modules that address the unique challenges faced by heritage

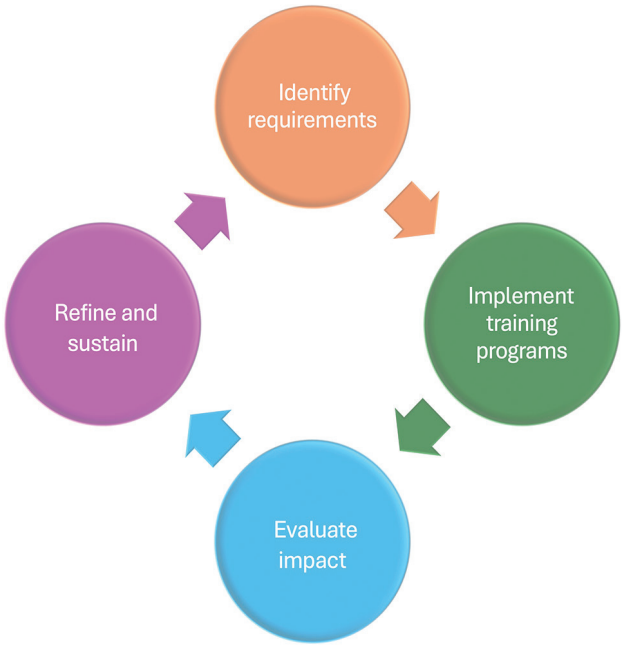

Figure 2. An iterative process for integrating marketing education in cultural heritage management

professionals – such as communicating cultural value to investors or managing branded campaigns within protected sites. Incorporating scenario-based learning and structured certification tracks helps ensure that training aligns with day-to-day responsibilities, making the acquired skills both practically relevant and results-driven.

According to Ziliotto and Holden,[81] leveraging internal mentorship systems can expand the reach and sustainability of formal education. By encouraging experienced staff to guide their peers in marketing practice, institutions cultivate in-house expertise and strengthen a culture of collaborative learning. Peer-led exchanges foster institutional memory, reduce reliance on external training, and create adaptive learning environments rooted in practical experience.

8.2. Building collaborative networks and partnerships

The success of marketing education in the heritage sector is significantly enhanced by the presence of strong, multi-stakeholder partnerships. It is argued that sustainable and impactful training frameworks are most effectively developed through synergies between academic institutions, cultural organizations, government bodies, and private sector actors. These partnerships align with the growing recognition of heritage management as an interdisciplinary field that demands diverse forms of applied expertise.[70]

8.2.1. Joint certification programs

Co-designed certification schemes involving universities and heritage institutions ensure that training remains closely aligned with sectoral needs. Programs such as "Digital Marketing for Cultural Assets," which combine theoretical instruction with case-based learning from museums and community heritage sites, exemplify this model. Such hybrid structures bridge academic knowledge and practical demands, enhancing both relevance and credibility.[70]

8.2.2. Policy-driven collaboration

Engagement from public authorities is essential for integrating marketing education into broader cultural policy. This study proposes that regulatory frameworks should mandate dedicated budget lines for training and audience development within heritage projects. Embedding education in policy structures supports financial sustainability and reflects a shift from reactive funding to proactive investment in institutional capacity and human capital.[82]

8.2.3. Internships and mentorship programs

Experiential learning mechanisms – such as internships and structured mentorship schemes – are critical for meaningful capacity building. Ziliotto and Holden[81] emphasize that immersive experiences within marketing departments help early-career professionals develop strategic thinking and sector-specific expertise. Building on this perspective, this study suggests that such programs also foster long-term institutional knowledge retention, integrating marketing competence into routine professional practice.

8.2.4. Collaborative research and workshops

Cross-sectoral research initiatives and training workshops serve as platforms for both innovation and the transfer of skills. As noted by Daldanise,[67] collaborative events focused on branding, campaign design, and audience analytics generate not only practical toolkits but also valuable academic insights. This study affirms that structured exchanges among educators, practitioners, and policymakers strengthen the intellectual foundations of marketing education and support its continuous adaptation to sector-specific change.

Taken together, these collaborative strategies transform marketing education from a fragmented activity into an institutionalized, sustainable practice – anchored in collective knowledge production and applied problem-solving.

8.3. Ensuring accessibility and measuring impact in marketing education

Maximizing the effectiveness of marketing education for heritage professionals requires a dual focus: broad accessibility and rigorous impact evaluation. Together, these dimensions help ensure that training programs are not only equitable and inclusive but also responsive to evolving sector-specific needs and audience expectations.

8.3.1. Accessibility and inclusivity

To democratize participation in marketing education, programs must address structural barriers related to geography, language, infrastructure, and socioeconomic inequality. Scalable digital platforms, multilingual content, and targeted scholarships are identified as key mechanisms for reducing participation gaps. Tailoring training to local institutional and cultural contexts further enhances relevance and supports practical uptake across diverse heritage environments.

Eichler[83] proposes that accessibility must go beyond availability to become active inclusion. In this view, marketing education should empower marginalized communities not just as learners but also as co-creators of heritage narratives. The "Adopt a Heritage" scheme in India exemplifies this approach – by engaging local

communities in stewardship roles, which generates both socioeconomic benefits and cultural sustainability.[84] Similarly, outreach programs by the Iziko Museums in South Africa incorporate historically excluded groups into heritage discourse through co-curated exhibitions and participatory workshops. As noted by Ndhlovu and Rassool,[85] such initiatives foster pluralism, deepen civic engagement, and strengthen the social fabric of cultural institutions.[85]

8.3.2. Measuring impact and adapting frameworks

Robust evaluation mechanisms are essential to ensure that marketing education delivers measurable outcomes. Parowicz[78] recommends a multidimensional framework combining quantitative and qualitative indicators – —such as completion rates, participant feedback, and real-world impact metrics such as increased visitor engagement or improved fundraising results.

Key performance indicators related to skills development, project execution, and stakeholder satisfaction provide actionable insights into program effectiveness.[86] For example, a museum that launches a digital campaign following staff training could compare visitor analytics and online engagement data before and after implementation to quantify its impact.

Technological infrastructure further strengthens this evaluative process. Learning management systems integrated with real-time analytics dashboards allow institutions to track learner progress, visualize knowledge application, and assess long-term outcomes. The European Observation Network for Territorial Development[87] notes that such systems facilitate ongoing curriculum adaptation in response to emerging trends, including audience personalization, digital monetization, and the integration of green metrics in cultural management.

By embedding accessibility and evaluation as foundational principles, heritage institutions can ensure that marketing education not only equips professionals with relevant skills but also drives meaningful structural transformation. This integrated approach aligns cultural stewardship with broader goals of equity, accountability, and future-readiness.

9. Conclusion

9.1. Conclusions from the state-of-the-art analysis

This study has reviewed contemporary literature and practice related to two emerging strategies – CPs and DIC – and examined their reliance on marketing competencies for successful implementation. It confirms a growing consensus that cultural heritage institutions must adopt strategic, audience-centered approaches to remain relevant, accessible, and financially viable. However, it also identifies a gap in structured training and theoretical grounding for these competencies within heritage governance.

9.2. Findings from this study

Based on a comparative analysis of international case studies and policy frameworks, five key skill domains are identified: strategic planning, audience engagement, digital analytics, ethical storytelling, and intersectoral collaboration. These domains are consistently evident in successful heritage initiatives that integrate preservation with economic and social engagement. The analysis further reveals that institutions integrating marketing education – formally or informally – tend to demonstrate stronger stakeholder alignment, diversified funding sources, and enhanced public legitimacy.

9.3. Policy and practice implications

For policymakers, the findings suggest that national cultural strategies should mandate the inclusion of marketing modules within professional development programs. Heritage institutions should regard marketing education not as an ancillary tool but as a structural pillar of governance. Strategic alliances between universities, museums, cultural non-governmental organizations, and the private sector are essential for developing training that is relevant, inclusive, and scalable. A recommended benchmark is the integration of marketing education into 30% of heritage programs by 2030, supported by policy incentives and dedicated funding streams.

9.4. Recommendations for future research

While the present study offers conceptual clarity, further empirical research is needed to assess the direct impact of marketing training on heritage management outcomes. Surveys and pilot programs could evaluate how newly acquired competencies influence audience metrics, fundraising performance, or institutional resilience. In addition, cross-cultural comparisons may help determine which marketing strategies are context-sensitive and which are globally transferable.

9.5. Concluding statement

Marketing education is not a substitute for conservation ethics, but a complementary force that enables cultural heritage institutions to communicate their value, engage diverse publics, and secure sustainable investment. By embedding these competencies into professional training and governance structures, the heritage sector will be better equipped to navigate contemporary challenges – preserving the past, serving the present, and shaping an inclusive cultural future.

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