

## Article

# Analysing the Mediating Effect of Heritage Between Locals and Visitors: An Exploratory Study Using Mission Patrimoine as a Case Study

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**Abstract:** The connection among firms and tourists within cultural tourism clusters (CTC) is particularly strong in historical and World Heritage Cities destinations due to the ability of these destinations to contribute to the development of social capital (SC). This ability is explained from the fact there is a strong connection between cultural heritage, identity and sense of belonging. In recent years the meaning of heritage has shifted from national to local importance, based on cultural value rather than on architectural or historical value. Therefore, the participation of local communities is essential in the heritage of sustainable tourism. This allows them not only to express their opinions, but also to actually take part in the processes of planning and management of heritage conservation. Local communities are those that are closely linked to cultural heritage. On the one hand, by applying an ambidextrous management approach to Mission Patrimoine (French lottery launched in 2018 aiming at generating revenue to restore build heritage) the French government has the opportunity to initiate a social capital (SC) initiative associating local stakeholders, namely the local government and the local population, and on the other hand, visitors or tourists. In this paper, a community-based heritage conceptual model is suggested to strengthen the identity sense and to combat the negative effects of tourism. Organisational ambidexterity has been identified as the most suitable approach, due to its ability to contribute to the development of a dialogical spaces. The findings of this research are going beyond the topic of heritage. They are relevant to any research related to sustainability.

**Keywords:** ambidextrous management; creative tourism; tourismphobia and anti-tourism movements; social capital; heritage

## 1. Introduction

Half of the French population is gambling or playing the lottery at least once a year. As a result, gambling and lottery generate 40 billion euro per year, and 100,000 jobs are created [1]. Despite the income generated by the sector and the job creations, Costes et al. [1] are arguing that the money spent by players can not be fully considered as rational, because it does not benefit the wellbeing of the player or the society/community. In this study, the opposite is argued. More specifically, this study is arguing that the lottery, Mission Patrimoine, launched in 2018 by the French government, could play the role of a mediator between the government, the locals and visitors. This is all the more important in the current international context of anti-tourism movements and tourismphobia [2–4]. Additionally,

Gombault [5], is arguing that there is a gap in the application and research on the topic of creative tourism applied to France.

Additionally, this paper is arguing that Mission Patrimoine could play a role in the creative dimension of tourism in France. Creative tourism is defined as ‘travel directed toward an engaged and authentic experience, with participative learning in the arts, heritage, or special character of a place, and it provides a connection with those who reside in this place and create this living culture’ ([5], p. 2). Part of the objectives of this research is to establish a link between Mission Patrimoine and creative tourism. Equally important, for the success of Mission Patrimoine, a balance needs to be found between all parties involved in order to get some benefits out of it. When an activity is not beneficial to all parties involved it can lead to conflicts and social issues [6,7].

At this stage, it is important to mention the fact that in English, the word *patrimoine* means ‘heritage’. This paper is therefore establishing a connection between heritage and lottery, what will be more obvious in the following section. France is the most visited destination in the world, as such, the tourism industry is very important for the local economy [8]. Heritage plays a significant role in the competitive advantages of the destination. For instance, ‘The French gastronomy and ‘art de vivre’ are among the segment of heritage that contributes to the positive image of the destination abroad [9]. To maintain in good condition its (built) heritage (castles etc.), the French government launched the project Mission Patrimoine. Thus, using Mission Patrimoine as a case study, this paper has two objectives:

- Discuss the limitations of Mission Patrimoine
- Discuss the potential benefits of adopting an ambidextrous management approach for Mission Patrimoine

From a methodological point of view, this paper is based on a qualitative approach. Indeed, this method focuses ‘on words rather than numbers in the collection of data’ ([10], p. 286). Additionally, in this paper, an inductive approach has been adopted as the study is ‘exploring, explaining uncovering phenomena and for generating new theoretical insights’ ([11], p. 107). It is also worth adding that on top of being inductive, qualitative research can also be constructivist and interpretivist ([10], p. 286). Because of the topic of this research study (impact of the management of lottery on the interaction among different groups) and based on the fact that the subject considered for this study was recently created (as highlighted before, Mission Patrimoine was created in 2018), this research is already calling for further research, and more specifically for longitudinal studies. As stated by Silver et al. ([12], p. 75) ‘The primary objective of longitudinal research is to monitor behaviour over time and thereby identify behavioural or attitudinal changes’. This view is further supported by Costes et al. [1], who carried out some research on lottery (and gambling) in France.

## 2. Contextual Framework

Société Française des Jeux (FDJ, The French Games) is a semi-public company, 72% owned by the French government. Heir to the French National Lottery created in 1933, the FDJ was founded in 1976, the year when the National Lottery was created. It holds, under the control of the Minister in charge of the budget, the monopoly of lottery and sports of betting games on the French territory, including the overseas territories (Martinique, Guadeloupe, etc.) and Monaco. However, since 2010 online betting activities have been open to competition. In 2018, the French State announced a plan to sell part of the FDJ’s capital, to keep only 25 to 30%. In 2015, betting activities made 15 billion euros (5% yearly growth) for a customer base of 26 million and 31,000 points of sale. The company, which employs about 16,000 people, generated gross gaming revenue of 5 billion euros for a net profit of 180 million in 2017, and a contribution to public finances of 3.4 billion euros, or 1% of the French government’s budget.

The first draw of the Heritage Lotto took place on 15 and 16 September 2018 during the European Heritage Days, which granted free access to 12 million visitors to sites such as the Presidential Palace, the Senate, etc. Therefore, the issue of cultural heritage is now a popular cause due to the fact it was

for long neglected. The idea of a heritage lotto was initiated in 2001 by the Foundation du Patrimoine (heritage foundation), in response to the recurrent observation that it is difficult for the French Ministry of Culture and local governments to maintain a budget sufficient for them to fulfil their heritage conservation mission [13]. The project is inspired by the British Heritage Lottery Fund, which has raised nearly £8 billion since its inception in 1994, used namely for the restoration of nearly 20,000 historic buildings and monuments.

The FDJ was identified to create and distribute bespoke lottery games aimed at new audience groups, in order to generate new revenues to be earmarked for the restoration of historic and cultural monuments [14]. The Heritage Lotto is designed to raise funds for the Heritage Foundation to ensure the maintenance of monuments. The criteria for allocating the collected funds are the result of a consultation between the Ministry of Culture and the Heritage Foundation: 270 monuments have been designated as beneficiaries, including 18 sites considered emblematic (1 site for each of the 18 regions and metropolitan and overseas France territories) appearing on the lotto tickets sold [15]. The choice of beneficiary sites aims at highlighting local heritage in each territory, the vernacular heritage, the threatened heritage (e.g., house of the writer Aimé Césaire on the island of Martinique, in the French Caribbean).

The matter is of the utmost importance in terms of the attractiveness of French destinations, and in general terms of the overall performance of France, as a destination for tourists. Specifically, the French government's objective of welcoming 100 million foreign tourists in 2020 is in fact confronted with the rising constraints induced by a massive number of visitors to certain monuments, natural sites, etc. The General Manager of Atout France, the government agency in charge of promoting France overseas, points out that 80% of tourists visit Parisian cultural sites along the Seine, now close to saturation for an increasing number of dates during the year. The question also concerns Versailles or Mont-Saint-Michel.

### 3. Conceptual Framework

#### 3.1. Organisational Ambidexterity and Tourism Management

Regardless the industry or sector, organisational ambidexterity (OA) is about combining exploratory and exploitative innovation [16]. On one hand, exploratory innovation requires a departure from existing knowledge and implies experimentation [17]; on the other hand, exploitative innovations are incremental and represent refinements of existing knowledge [18]. The topic of OA is closely related to the topics of innovation; performance and sustainability [16]. Indeed, 'Innovation can help firms to improve (1) how they serve an existing consumer base and (2) further exploit their current competencies, in order to gain prolonged benefits ( . . . ) from the potential of organisational ambidexterity, as a key driver of sustained performance in the tourism industry' ([16], p. 1–2). Because of the benefits of this management tool, many sectors and/or industries have opted for this mentioned tool. Among these are: higher education; media studies; information technology; human resources management; professional services; leadership; management control system; entrepreneurship; customer service; finance; agriculture; pharmacy; etc. [19]. That said, in tourism and hospitality, the use of OA is extremely limited. In Events and leisure, OA is not used at all. Thorough a systematic literature review of the 52 journals in tourism, hospitality, leisure and events listed in the Association of Business School (ABS) list (now 'Academic Journal Guide', since 2018), reveals that 12 articles have been published between 2014 and 2018 with the words: 'Ambidexterity' or 'Ambidextrous' either in their title and/or keywords. A summary of existing research on OA in the area of hospitality and tourism is summarised in the table below (Table 1). There is a dearth of research in this area which this work is going to contribute to address. The same could be said about cultural tourism and innovation [20].

**Table 1.** Systematic literature review on organisational ambidexterity (OA) in hospitality and tourism.

Area	Author	Year	Journal
Destination Management	Mihalache & Mihalache	2016	Annals of Tourism Research
	Martinez-Perez et al.	2016	Int. Journal of Cont. Hosp. Mgt
	Seraphin et al.	2018a	Journal of Dest. Marketing & Mgt.
	Seraphin et al.	2018b	Journal of Dest. Marketing & Mgt.
Hospitality	Tang	2014	Inter. Journal of Hosp. Mgt.
	Tsai	2015	Current Issues In Tourism
	Ubeda-Garcia et al.	2016	Cornell Hospitality Quarterly
	Cheng et al.	2016	Inter. Journal of Hosp. Mgt.
	Bouzari & Karatepe	2017	Int. Journal of Cont. Hosp. Mgt.
	Wang et al.	2018	Int. Journal of Cont. Hosp. Mgt.
	Ubeda-Garcia et al.	2018	Int. Journal of Cont. Hosp. Mgt.
	Ma et al.	2018	Inter. Journal of Hosp. Mgt.

### 3.2. Heritage/Cultural Tourism Management

Seraphin et al. ([21]: 92) explain that “heritage” “covers a wide range of areas (including culture; history; politics; religions and communications) that can be classified into three main groups: built heritage (forts, relics, etc.); scientific heritage (plants, birds, natural habitats, etc.); and cultural heritage (fine art, customs, languages, etc.).” They also added that: “heritage tourism, which typically falls under the purview of cultural tourism (and vice versa), is one of the most notable and widespread types of tourism and is among the oldest forms of travel.” As highlighted by Di Fazio and Modica [22], what ethnologists, anthropologists, geographers, and other researchers in Europe had started documenting, collecting and valorising from the end of the 19th century, today can be seen as a common heritage of largely recognised and consolidated value. Today, heritage should be considered as an economic resource to be used in view of long-term sustainability [22]. Additionally, as a field of research, heritage and tourism is well developed and play a major role in the marketing strategies of many destinations, as central in the attractiveness of destination and satisfaction level of visitors [21]. The topics associated with “heritage” are as follows: sustainability; stakeholders; identity; culture; ecology; sustainability; corporate social responsibility; food; authenticity; identity; politics; tourist consumption; world heritage; local community; environment; and interpretation; lifestyle; attraction; experience; tourist motivation; nostalgia; interpretation; and thanatourism or dark tourism [23]. That said, research associating heritage with marketing is rather limited [2]. The same could be noted about research associating heritage/cultural tourism and OA. Martinez-Perez, Garcia-Villaverde and Elche [20], provided the only paper in the area.

### 3.3. Cultural Tourism Clusters

Cultural tourism clusters (CTCs) “entail engaging networks of collaborative and competitive relationships with other local companies, such as, for example, travel agencies, tour operators and institutions” (Sainaghi & Baggio, 2014 cited in [20], p. 1485). Moreover, Martinez-Perez, Garcia-Villaverde and Elche [20], explain that the connection among firms and tourists within CTC is particularly strong in historical and World Heritage Cities destinations due to the ability of these destinations to contribute to the development of social capital (SC). This ability is explained from the fact there is a strong connection between cultural heritage, identity and sense of belonging [20]. Putman (2000, cited in [20]) argues that SC puts together two opposites, namely bonding SC (Reciprocity and solidarity between individuals sharing similar characteristics) and bridging SC (connection from networks of different individuals) (Figure 1). As for Martinez-Perez, Garcia-Villaverde and Elche [20], they argue that bonding and bridging SC are complementary (not opposite) and source of innovation. Based on the preceded information, CTC could be related to OA as “CTC are able to drive the

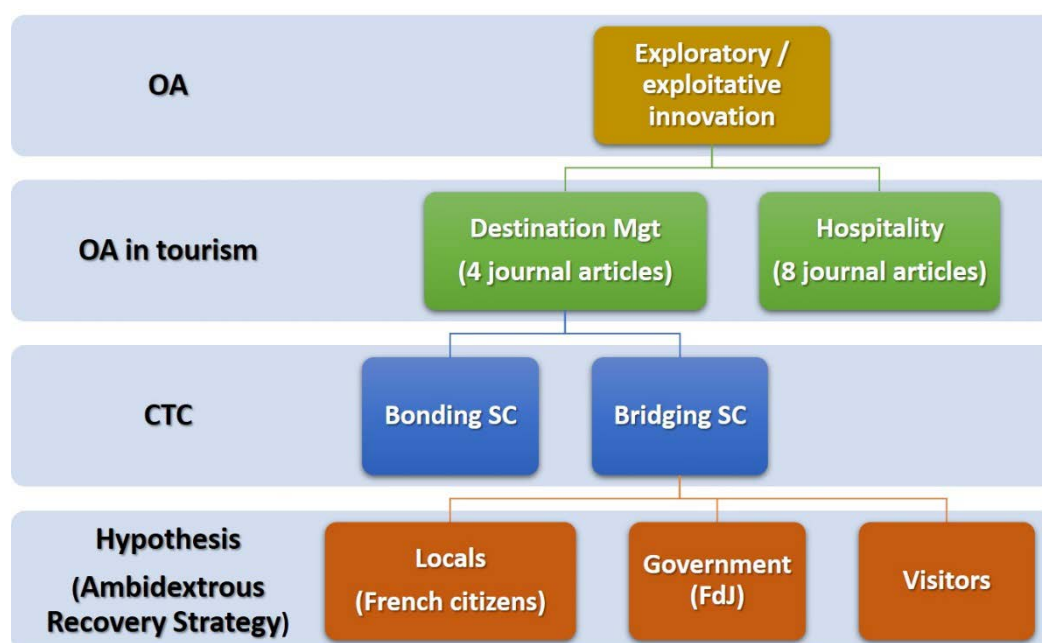
combination of bonding and bridging capital to develop a strategy from exploration and exploitation of knowledge simultaneously, this would achieve better results in innovation” ([20]: 1491).



**Figure 1.** Cultural Tourism Cluster and Organisational Ambidexterity.

### 3.4. Hypothesis

Based on preceded literature, this research paper is going a step further by inferring that within, a bridging SC strategy, can emerge groups that are often presented as heterogeneous. But when combined, the result is an Ambidextrous Recovery Strategy (ARS), which is a source of greater experience and benefits for all stakeholders involved within the cluster. More specifically, this research paper is arguing that by developing the lottery Mission Patrimoine, the French government has the opportunity to initiate a bridging SC strategy. On the one hand, associating local stakeholders, namely the local government and the local population; and on the other hand, visitors or tourists. This segmentation could also be depicted as providers of an experience (local populations and government) and recipients of a service (visitors or tourists). Or even as individuals (locals and tourists) vs government body (FdJ). The trinity locals, FdJ and visitors is made of partners belonging to different spheres, and therefore perfectly fits the characteristics of bridging SC defined by Putnam (2000 cited in [20]). In a nutshell, this study moves from the hypothesis that the different spheres generated within the bridging SC strategy of Mission Patrimoine are complementary rather than opposed dimensions. From this complementarity can emerge the topic of Ambidextrous Recovery Strategy (ARS). Figure 2 summaries the hypothesis and the related process.



**Figure 2.** Ambidextrous Recovery Strategy (ARS).



#### 4. Methodology

In this paper, the French Lottery Mission Patrimoine is used as an exploratory case study. A single case exploratory study “focus on one individual, business or organisation to develop research questions and objectives” ([24], p. 43). The case study which “has become increasingly associated with an in-depth exploration of a particular context ( . . . ) in order to explain how and why about a phenomenon, ( . . . ) it is literally an example of something, a unit of analysis” ([11], p. 16–18), and has subsequently been used to test the hypothesis indicated in Section 3.4. Indeed, ‘there is no reason why case studies, in particular multiple cases, should not be used to test a hypothesis’ ([11]: 18). Thus, to address the research question regarding the benefits and limitations of Mission Patrimoine, key stakeholders were interviewed (semi-directive interviews). To some extent, this approach could be assimilated to the Delphi method, in other words, it was implemented on “the construction of a panel of expert and collecting and interpreting experts responses” ([11], p. 43). The interviewees were told that: the results of the study would be used for research purpose; that their answers would be kept anonymous; and finally that they could withdraw from the study at any time. The following paragraph provides an overview of the panel interviewed.

1. A regional director for the Fondation du Patrimoine. This non-profit organization is eligible to receive donations suitable for a tax deduction. This regional director leads an important local network of donors and companies involved in skills-based sponsorship. He has also played an important role in identifying the monuments eligible for the heritage lottery.
2. An academic, specialist of cultural tourism in France, who also happens to be knowledgeable about monuments restoration initiatives in France, as well as the challenges of cultural tourism. This academic is also familiar with the various financing mechanisms existing in France for heritage conservation.
3. The co-founder of a non-profit association, whose purpose is to restore endangered castles and create sustainable communities around them. He also created a crowdfunding platform dedicated to raising funds for buildings that need to be restored. This platform is used by the NGO, as well as by other restoration project leaders. The founder is an expert in strategies for creating and animating communities around heritage sites (digital strategy, communities around restoration sites).
4. The owner of a heritage site. In order to secure funding for the conservation of his domain, he became at creating events aimed at attracting national and foreign visitors, all over the year.
5. The founder of a destination management company (DMC). Specialist of a tourist destination including 2 castles of major touristic and heritage importance, she also leads a local NGO bringing together donors and sponsors in skills.

#### 5. Results

##### 5.1. The Heritage Lottery as a Tool to Raise Funds for the Restoration of Pre-Identified Sites

They were collected 15 million euros for the benefit of the Mission Patrimoine. To quote the president of FDJ, the “French are [with the Loto du “Patrimoine] twice winners, since they can win as players but also because they will financially support something useful”. The amounts collected, supplemented by donations made directly to the Fondation du Patrimoine for the rehabilitation of identified sites, will make it possible to reach a budget of around € 35 million [25]. This amount represents 10% of the annual budget allocated by the Ministry of Culture to historic monuments. On 15 January 2019, the Mission Patrimoine disclosed the exact amount of funding allocated to each of the 269 earmarked sites: while some project leaders were disappointed by the amounts they would finally receive, others were fully satisfied.

The other sources of funding for the restoration of the sites are both public (city, administrative district, the Ministry of Culture via its regional delegation) and private, namely by way of tax deductible

sponsorship. The Mission Patrimoine proves to be a powerful vehicle to facilitate the involvement of private stakeholders: financial donations earmarked to the Foundation are automatically recognized as tax-deductible, and donations in kind are also facilitated (for example, a catering service offered for an event aimed at promoting the endangered site, then invoiced to the Mission Patrimoine, is tax exemption eligible in the same way as a financial donation). Despite the absence of a tax rebate, the expectation of a gain with the heritage lottery was a strong enough incentive to secure a significant budget. The sums collected might have been higher if a communication campaign had succeeded in giving greater prominence to the sites, particularly via mass media, of which Stéphane Bern is a specialist.

### *5.2. On the Relevance of the List of Sites to Receive the Proceeds from the Heritage Lottery*

Established by the Ministry of Culture and the Heritage Foundation, the list contains sites of significant historical importance, as well as other sites of more questionable historical importance. Greater transparency in the selection process, and perhaps also the involvement of other stakeholders—particularly within local communities—in the selection of sites, could have a significant impact on the amounts collected in future occurrences of the lottery.

### *5.3. On its Ability to Nurture the Public's Interest in National Heritage*

The public, whether local residents or not, show little awareness of the beneficiary sites. This first occurrence of the lottery seems to have an effect which limited fundraising for monument restoration, with little effect, on communities, potentially interested in the site. Besides offering tickets in the effigy of the 18 emblematic sites, the lottery could have been more effective in developing the general public's awareness and interest for the 269 restauration projects, for example using TV documentaries. As such, the decision to purchase a lottery ticket might be merely motivated by the hope for winning than the keen intention to sponsor heritage. Because of the large number of tickets sold and the strong notoriety of the project leader, the lottery is nonetheless a potentially powerful means for structuring communities around the designated sites. If "sponsorship in skill" (*mécénat de compétence*) were to be made a mandatory component of the financing plan, it would result in enhancing the local community's involved and trust in heritage management [26,27], whilst stimulating the local economy and contributing to the preservation of craftsman skills.

### *5.4. On the Heritage Lotto's Ability to Contribute to National Heritage Besides the Restoration and Conservation Missions*

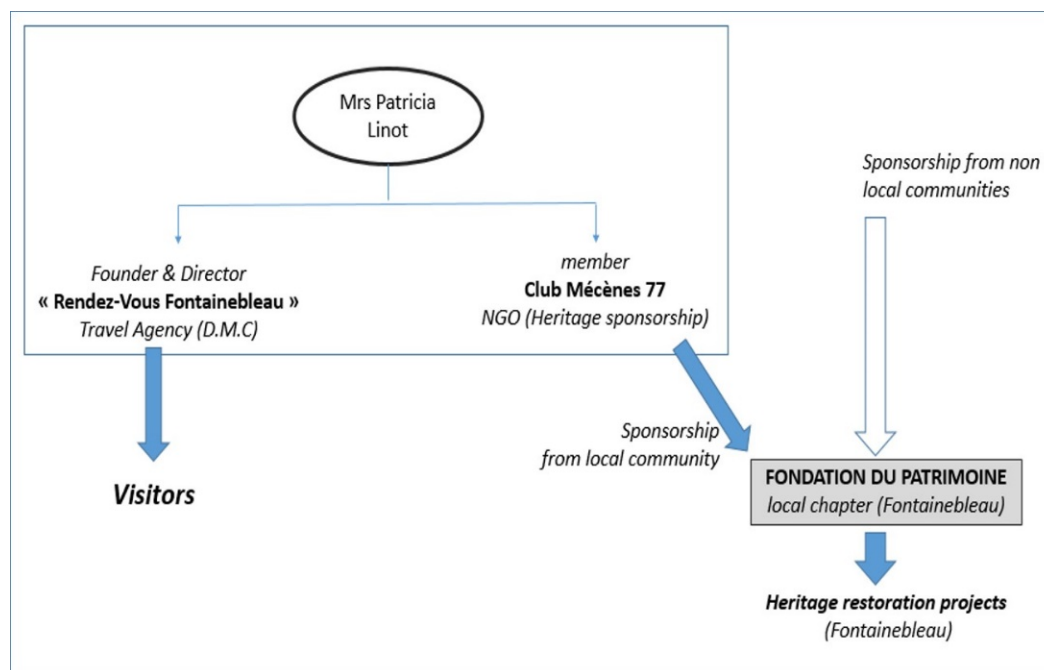
If we define heritage as the "features belonging to the culture of a particular society, such as traditions, languages, or buildings, that were created in the past and still have historical importance" (<https://dictionary.cambridge.org>, accessed on 26 April 2019), such communities are liable to play a role beyond restoration building in order to preserve or even resuscitate events and traditions directly associated with the monument. It is considered regrettable that this first occurrence of the lottery did not play a more important mediating role with the general public. Instead of leading the latter to express a more lasting interest than the ephemeral act of buying a lottery ticket bearing the image of one of the 18 chosen sites. This occurrence of the heritage lottery fails to contribute in building a real community of individuals, close or remote, willing to visit the site, to get involved in a prolonged and tangible way.

Based on the findings of this research, the following section is going to provide some recommendations. Indeed, Section 6.1 is going to provide recommendations and further discussed Sections 5.1 and 5.2. Section 6.2 will address Sections 5.3 and 5.4.

## 6. Recommendations and Discussions

### 6.1. Building a Community Around the Heritage Site

A community, geographically defined, which is involved in preserving the heritage associated with a monument, is characterized by the diversity of its stakeholders, as well as the nature and impact of their contributions (Figure 3).



**Figure 3.** Stakeholders from the tourism industry. A key actor in a local heritage community. Example of the founder of a Destination Management Company (DMC)-Fontainebleau, France.

The first occurrence of the heritage lottery brought members (general public) into a loosely defined community, with a common interest: getting a chance to win than contributing to the restoration. An interesting illustration of successfully engineering community is the one of Adopte un Château (Adopt a Castle). Established in 2015, this French association aiming at restoring castles has laid-out a very specific strategy for collecting funds, intensifying donors' involvement into the project, and, last but not least, attracting stakeholders into the site, or during the restoration phase, or after its completion. With its crowdfunding platform named Dartagnans, the NGO offers to the general public in France and overseas the opportunity to sponsor the restoration of monument from a list of selected sites. This initiative is remarkable in many aspects.

First, the overall communication strategy relies on rich contents (video footages filmed from a drone, etc.) made widely available via video-sharing platforms and abundantly commented by national media. More importantly perhaps, the promise made to the donor is very different from the usual tax-deductible donation scheme: Adopte un Château offers the opportunity to become the owner, amongst many others, of the castle to be restored. Each individual donor is therefore symbolically more profoundly engaged into the restoration project:

"I did not want to let 'my' castle down, the castle from my childhood." (A local resident, during a visit organized by Adopte un Château. Château de l'Ebaupinay: <http://bit.ly/2RtI0wV>, accessed on 26 April 2019).

By turning donors into committed owners, Adopte un Château carves around each project a community: participation to the restoration, taking part into events aimed at attracting visitors:



“We will do our best to restore [the castle], and organize events, like in the Middle Age (A local resident, future owner, during a visit organized by Adopte un Château.” Château de l’Ebaupinay: <http://bit.ly/2RtI0wV> accessed on 26 April 2019).

The community is expected to play a large and long lasting role: finance and volunteer restoration work, activities and events to attract visitors. For such communities, bringing back a castle to its original function and attractiveness is as important as restoring it. The relationship between heritage and tourism is well established [28] and it is generally assumed that culture and tourism are interdependent.

The growing interest in cultural resources is likely to benefit culturally rich destinations, and simultaneously to provide the tourism industry with challenges of managing heritage facilities and attractions. Tourism is also an opportunity to generate income for the local community while simultaneously supporting the preservation of its heritage [29].

Stakeholders from the tourism industry are therefore meant to be an important part of such local communities, contributing to the preservation and protection of heritage, whilst incorporating the latter into tourism products and attracting visitors, local or foreign. With local knowledge, expertise and resources, they work in the design and implementation of events, activities, tours, transportation and program logistics.

Together with local chapters of Fondation du Patrimoine (offering the advantage of guaranteeing tax rebates to donor), stakeholders of the tourism industry have a vested interest in the preservation of local cultural heritage, as illustrated in the exhibit above. Another category of stakeholder of the tourism industry are companies managing heritage sites: with the responsibility of bearing the cost of preserving the site, they lay out business models with tourism as the main source of revenue. As an illustration, the company managing the Vaux le Vicomte castle offers a very wide array of events and attractions throughout the year, as well as unique venues for the organization of private events.

The relationship between heritage and tourism is frequently characterized by contradictions and conflicts whereby conservationists perceive heritage tourism as compromising conservation goals for profit [28]. However, the importance of preserving cultural heritage through tourism is receiving increasing attention and has been discussed in relation to sustainable tourism (ibid.). Fostering heritage tourism throughout an extended territory (nationwide) is also likely to efficiently address the rising issue of overtourism and related perverse impacts (tourismphobia and anti-tourism movements) in major cities.

## 6.2. Community Based Heritage as a Tool to Reduce Tourismphobia, Anti-Tourism Movements

The relationship between heritage and the identity of a community makes it possible to address some issues of modern tourism. Here, we talk about the problems related to tourist pressure and its effects.

Public participation in the management of cultural heritage can solve some social conflicts [30] and it also helps to define the meaning of heritage in which the visions of experts and communities are often different [31,32]. As stated by Yung & Chan [31], in recent years the meaning of heritage has shifted from national to local importance, based on cultural value rather than on architectural or historical value.

It must also be said that the management of cultural heritage has evolved [33] by making public participation an essential element in the decision-making process [34]. Active participation at local level and social relevance are, therefore, dominant characteristics of cultural heritage practice of the recent years [35]. The participation of local communities in heritage management and in planning should extend the involved scientific expertise by adding local experiences that allows to recognize the importance of social judgement [36]. Therefore, the participation of local communities is essential for their involvement in the decision-making process. This allows them not only to express their opinions, but also to actually take part in the processes of planning and managing heritage conservation. Local communities are those that are closely linked to cultural heritage. Heritage conservation

should be for local communities and they should have the right to decide what and how to maintain and manage.

The presence of a community and its relation with the heritage could develop also a wellbeing condition. Power & Smyth [37] argue that it is important understanding the space that is created by community-based heritage groups and whether it is likely to promote social welfare. Gleeson [38] state that in the era of globalization and ecological risk it is certainly understandable that there is a new desire for social values based on community, belonging and place. That is what Gleeson call the new social yearning: the desire for a safe place in a social networks based on reciprocity, trust and mutual respect [37].

All those elements represent the formal condition to a social and economic development under sustainable condition. In this sense the tourism could be managed in a sustainable form. The importance of the relationship between community and sustainable tourism has been clearly recognized in the last two decades through studies on community-based tourism (CBT). These communities aim to create a more sustainable tourism industry by focusing on hospitality in terms of planning and maintaining tourism development. This idea came to the fore in the 1990s, with Pearce [39] suggesting that CBT represents a way to provide a fair flow of benefits to all those interested in tourism through consensus-based decision-making and local control of development. The CBT, therefore, proposes a symbolic or reciprocal relationship in which the tourist is not given central priority but becomes an equal part of the system [40]. According to Salazar [41] the most promising niche to develop CBT programs is cultural tourism, one of the major growth markets in global tourism.

Communities can also be based on heritage. Power & Smyth [37] state that the preservation of community-based cultural heritage refers to the increasingly popular activity of uniting with community members to research local historical “assets”. It involves the development of a stronger relationship with your local area and is potentially open to everyone, regardless of location.

Unfortunately, participatory protection and enhancement are often linked only to high-value cultural assets. In relation to the low value attributed to local and less important sites and buildings, there is a tendency to separate communities from their local history. Furthermore, oral traditions and local knowledge which in the past supported a sense of place and it was often associated with specific sites and monuments, it has been eroded by the socio-economic and demographic discontinuities that have occurred in both rural and urban communities over the past years.

In many countries, participatory approaches to heritage conservation and management have had success and are more culturally and socially sustainable than using top-down approaches. Experiences of community involvement are related to the integration among urban planning, conservation and public involvement in the field of heritage, also with a growing role in the decision-making process of the voluntary and community sector [31]. These communities are able to support the tourist pressure and the negative impacts of the overtourism. Actually, the concept of overtourism is not easy to define. Recently, the *European Parliament's Committee on Transport and Tourism (TRAN)* [42] defined overtourism as “the situation in which the impact of tourism, at certain times and in certain locations, exceeds physical, ecological, social, economic, psychological, and/or political capacity thresholds”.

As highlighted by Seraphin et al. [43], local communities are being aware of negative effects caused by overtourism. Therefore, they are increasingly interested in their quality of life rather than simply in the additional income generated by the tourism industry [43]. The consequences of overtourism are witnessed in various forms, namely pollution; littering; destruction of amenity of a place; degradation of landscapes; congestion; vandalism; disorders and anxiety among the local population [44]. Overtourism also causes risks to the UNESCO (United Nations Educational, Scientific and Cultural Organization) World Heritage status of some destinations; negative impacts on the quality of life, loss of identity, etc. [2]. Finally, it is important to remember the crowding out effects between residents' and tourism needs related to high pressure on touristic destinations. That said, Moscardo et al. [45], argued that conflicts between residents and visitors can contribute to the development of

social capital among local residents who gather within organizations or associations (anti-tourism movements) to defend their shared values and their sense of community and identity.

By involving local communities in heritage management, the benefits can be generated not only for the communities themselves, but also for society as a whole. At social level, community life can be improved. Community participation helps communities to build a sense of identity offering common identity, history and heritage.

Furthermore, social inclusion, cohesion and understanding can be strengthened by promoting a sense of shared responsibility towards the places where people live. Social capital and trust between people and government can be increased [46]. Furthermore, the relationships between not only within the communities but also between generations can be improved. And, above all, it helps the heritage to continue and maintain the value of the heritage of the past in the current life of local communities [47]. In addition to social impacts, through the involvement of local communities, it is possible to create more job opportunities for them. The economic profits of historical tourism can also go directly to the communities. Finally, the fact of being involved in heritage is good for health issues, which is a significant component.

Overall, we can therefore state that a community based heritage is characterized by the fact that it is the same community that has control over the management of tourism and receives a significant part of the benefits generated by this activity [48]. Therefore, this type of tourism has emerged as a possible solution to the negative effects of mass tourism and overtourism, allowing it to simultaneously become a strategy for social organization for the local community.

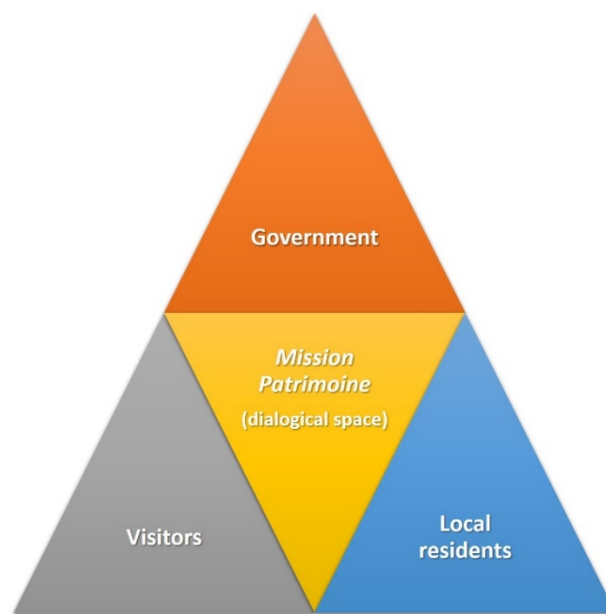
## 7. Conclusions

### 7.1. Key Findings

Despite the good intention behind Mission Patrimoine, the success could be considered to be mitigated by the fact that apart from the financial aspect, the project has failed to foster a sense of community, hence, the importance of the recommendation formulated in this research. The sense of community developed through the development and fostering of social capital is very important. The key findings of this research are directly related to the topic of sustainability.

### 7.2. Theoretical Implications

Carlisle et al. [49] are arguing that when multi-stakeholders are collaborating on a project, it often leads to innovation and success, which means that they are putting together resources and more importantly a shared vision. They took the example of academic institutions working with private and public sector organisations to support their view. Indeed, they argued that this collaboration led to knowledge creation; innovation; and growth in knowledge-based firms. In particular, they used the Triple Helix model [49] to theorise their findings. 'At the heart of this triangulation is the transfer of knowledge and knowledge management to promote the diffusion of ideas from universities adding value to the private sector via innovation' ([49], p. 62). Furthermore, 'the triple helix model is being widely used as a source of inspiration for policies and programmes aimed at fostering innovation. This is evolving across the range of policymaking at geographical scales, as well as independently of the geographies of context that determine different framework conditions for promoting innovation' ([50], p. 1675). The Helix model has also proven to be a suitable leverage tool particularly in less developed countries [49–51]. The case of Mission Patrimoine, support the fact that the collaboration between the government, locals and tourism (triple helix), can be beneficial for each stakeholders and contribute to the creation of a theoretical and practical dialogical space. In other words, a space (Figure 4) that would create positive relationships between the three groups, what might prevent issues like tourismphobia and anti-tourism movements [4].



**Figure 4.** Mission Patrimoine as a dialogical space.

### 7.3. Practical Implications

An ambidextrous management approach applied to the lottery could improve its outcomes and impacts. Among these are:

- Involvement of all stakeholders. Experts disagree on how monuments are selected in order to be restored. They are arguing the lack of transparency in the process. Additionally, not all stakeholders were involved in the selection process. Among these, there are expert in local heritage; or local residents living close to the selected monuments for restoration. Section 7.1 and Figure 4 are clearly highlighting the importance of having all stakeholders working hand in hand. An ambidextrous management approach could help with the development of a dialogical space. Local community involvement offers stronger ties with a common identity, history and heritage. Furthermore, social inclusion, cohesion and understanding can be strengthened by promoting a sense of shared responsibility towards the places where people live.
- Sense of belonging. From the interviews that we carried out, it appears that locals are mainly interested with the financial aspect of the project (winning the lottery), more than the social and cultural aspect. Indeed, in Section 3.3. we highlighted the importance of having a sense of belonging and, as highlighted in Section 7.2, community participation helps communities to build a sense of identity. A communication strategy (as part of an overall ambidextrous management approach) would have helped. Indeed, the organisation Adopte un Château in charge of Vaux Le Vicomte castle is a good example of organisation that has managed to gather locals around a project. Indeed, every member of a local community has the opportunity to invest in a local heritage site and subsequently to be an owner of this attraction. This strategy has contributed to develop a strong connection between the heritage site and the locals. Moreover, Vaux Le Vicomte castle, supports the models developed in Figures 1, 2 and 4.

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