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## Article

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Article

# Value Propositions in Heritage Tourism Site Business Models in the Context of Open Innovation Knowledge Transfer

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**Abstract:** This article discusses the structures of value propositions in cultural heritage tourism site business models in the context of the concept of open innovation. The objective of the study is to identify value propositions in tourism sites and the tendency of managers to use open innovation. The analysis was based on the example of European cultural heritage tourism sites associated with the European Route of Industrial Heritage. The research process included literature analysis and empirical research in the form of interviews conducted with managers of 73 sites. The research allowed for identifying 16 key values observed in the business models of cultural heritage tourism sites and then classify them into three groups, i.e., values proposed to the customer, values captured by the enterprise and social values. The following values were of the highest importance: promotion of historical industrial heritage, satisfying cognitive needs, acting as a symbol of the area, brand strengthening and organization of tourist traffic, so that the industrial heritage is preserved. It was noticed that some values were significantly correlated with the attitudes of managers towards the exchange of knowledge within open innovation. The majority of managers participating in the research were convinced that the revitalization of cultural heritage sites and the business models of these sites should be in the form of open innovation. The limitation of the research carried out is the inability to deepen the interviews, which was caused by the lack of direct contact with managers due to the COVID-19 pandemic.

**Keywords:** heritage tourism; value proposition; business model; Europe; open innovation



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## 1. Introduction

Cultural heritages classified by UNESCO World Heritage Convention [1] include 1154 sites, of which almost every second (47.2%) is located in Europe or North America. The majority are cultural heritage sites (77.7%), and 18.9% are world natural heritages. The list is complemented by mixed heritages (3.4%). The management of these sites is extremely complex. Although naming a site a World Heritage (WH) may contribute to increasing the protection of the site, it does not necessarily have a positive impact on the development of the area in which it operates [2].

Heritage tourism sites are made available to a wide group of recipients through their activities in the field of tourism and culture promotion. However, their ownership forms are generally complex, as they are managed by private (enterprises), public (cultural institutions) and nongovernmental organizations (foundations), and there are also mixed forms. Regardless of the form of ownership, however, in the market sense, they are independent economic units, the activity of which is subject to common market rules and competitive rivalry. For this reason, cultural heritage tourism sites, like any other economic entity, need modern management tools to map and effectively organize the processes taking place there in order to achieve competitive advantage.

Regardless of whether it is a business or social enterprise, a key component of any business model is the value proposition, the evolution of which is widely described in scientific literature [3,4]. The source literature, however, does not show the range of values

that arise as a result of the implementation of economic processes in heritage tourism sites. Meanwhile, sharing cultural heritage is also associated with managing inherited tangible and intangible goods so that subsequent generations can also benefit from them. Therefore, it seems justified to develop the practice of mutual exchange of knowledge on the management of the sites, especially in the context of their relationship with sustainable development. The answer to this need may be making this knowledge available in the form of open innovation.

The perceived literature gap that enabled the formulation of the research problem indicates the need to identify a set of values characterizing the value propositions in the business models of European cultural heritage tourism sites. An additional research task is to attempt to link the acquired knowledge with the tendency of managers to use and exchange knowledge within the framework of the open innovation concept.

The aim of this article is to identify the value in the business models of cultural heritage tourism sites and the level of willingness of managers of the sites to transfer knowledge as part of open innovation. It is, therefore, an attempt to discuss the structure of value propositions in the context of the concept of open innovation. An additional research question in this context is whether there is a relationship between the values sites prioritize and the tendency to use and share knowledge in the form of open innovation. The conclusions of the analyses were obtained on the basis of research carried out at European cultural heritage tourism sites.

## 2. Three Aspects of the Undertaken Scientific Problem—Literature Review

The research process aimed at finding answers to the formulated research questions was preceded by a critical literature analysis, in which three key issues were examined. The first issue concerns the general characteristics of cultural heritage. The second one deals with the value propositions in business models, especially in the context of tourism enterprises, and the third one relates to using open innovation for the management of cultural heritage tourism sites.

### 2.1. Heritage Tourism

While many heritage sites and artefacts date back centuries or millennia, the concept of *cultural heritage* was defined only half a century ago. The initial definition from 1972 limited the meaning of this concept to architectural works, sculptures, paintings and buildings, as well as historical, scientific, anthropological, ethnological and artistic values. It was not until 1980 that this list was supplemented with audiovisual works, in 2001 with underwater heritage, and in 2003 with issues related to human traditions and ways of life. As a consequence, four groups of cultural values were selected [5]:

- tangible heritage (movable heritage, immovable monuments, underwater cultural heritage),
- intangible heritage (oral traditions, performing arts, crafts and rituals),
- natural heritage (cultural landscapes, geological, biological and physical formations),
- cultural heritage endangered by destruction and looting in armed conflicts.

According to the definition of cultural heritage given by the United Nations Educational, Scientific and Cultural Organization (UNESCO), this term refers to the legacy of physical artefacts and intangible attributes inherited from past generations and preserved in the present for the benefit of future generations [5].

In addition to audiovisual and online access, which is possible especially for certain intangible cultural values, one of the key means of making cultural heritage accessible is to enable interested persons in physical contact with available artefacts, sites, places or artistic performances. Then, the heritage takes the form of a tourist attraction, generating tourist traffic at the site of the heritage elements and in its vicinity. The heritage becomes a resource necessary for running a tourist activity and at the same time the main motive for travelling to a specific place. In the economic sense, it becomes the basic element connecting the

perspective of the tourist organizer (supply) and the perspective of trip participants, i.e., tourists (demand) [6].

Although the literature shows that what builds a lasting bond with the consumer (tourist) is the authenticity of the shared heritage [7], there are also many examples where the process of continuous negotiation and recreating the shared elements of cultural heritage leads to the loss of the authenticity [8]. Interesting deliberations in this regard are conducted by J. Taylor [9], asking what makes unauthenticity dangerous; T. Dai et al. [10], who study the mutual influence of objective, constructive and existential authenticity; and A. Apostolakis [11], who quotes the that “as capitalism is driven by the greed for money, so is tourism in the case of heritage” (p. 797). These theses seem worth considering in the context of the limits of authenticity of an intact or processed cultural heritage, or at least asking the question of whether heritages increase tourist traffic or the opposite is true and tourism increases the number of heritage sites being restored. Regardless of the answer, it is indisputable that cultural heritages used for tourism purposes require the proper management of these value-generating resources. For this purpose, social media is increasingly used today. A literature review in this area was presented by K.Y. Sin et al. [12], who analysed scientific publications from the period 2012–2019 from the databases of Web of Science, Scopus and Google Scholar.

H. Wang et al. [13] show how sensitive areas of influence are tourist destinations based on cultural heritage. They study the impact of conflicts on cultural heritage. They identify two types of conflicts, vertical (between central and local governance levels) and horizontal (between different stakeholders). The results they obtained indicate that vertical and horizontal conflicts have impacts on cultural heritage sustainability in terms of preservation and enhancement.

R. Y. Chenavaz et al. [14] note that cultural heritage is at the heart of sustainable development, due to its contribution to the richness of the living environment for present and future generations.

## 2.2. Value Proposition and Its Distribution

The literature cites ways of creating cultural heritage tourism sites by creating typologically diverse business models [15]. It is worth paying attention to the various forms of intertwining industrial activities with tourist activities related to visiting post-industrial facilities. The frequent substitutability of both forms of activity as the dominant functions of a given area has been noticed. Most often, this substitutability was unidirectional, i.e., the production function was replaced by the tourism function.

One of the extremely important issues in business models is the structure of the key component of each model, i.e., the value proposition, the organization's generated and captured values. The original approach to value propositions in business models [3] was usually narrowed down to the values proposed to the customer, as it was defined as a set of products and services that generate value for a specific customer segment or as a reason why customers prefer a company's offer over those of its competitors. A. Osterwalder and Y. Pigneur [3] add that value propositions solves customer problems or satisfy their needs. It is also consistent with the definition of the core benefits in the structure of the tourist product, i.e., the set of benefits related to the realization of the main travel motive [16]. Neither the value proposition nor the core of benefits is universal in tourism, as their characteristics differ depending on the analysed forms of tourism.

The literature presents numerous concepts and classifications of values appearing in business models. M. Gasparin et al. [17] propose an interesting method of creating value propositions by Slow Storytelling. The method involves articulating the value proposition, taking the time to explain the heritage and the issues and involving customers. It is based on eight steps: narrating the organization, redefining the audience, articulating the heritage, mapping the journey, enhancing sustainability, engaging the ethical consumer, involving the customer as advocate and enriching the customer experience. Meanwhile, X. Font et al. [18] propose value co-creation in sustainable tourism. They explain how the



design for service approach of K. Wetter-Edman et al. [19] ensures the co-creation of value, and A. F. Alvares et al. [20] also referred to this issue when analysing the Brazilian Network of Tourism Observatories. The analysis covered 26 stakeholders having an impact on the quality of the tourist offerings in this country. Separately, E. Hadjielias et al. [21] describe how strategic agility enables tourism organizations to leverage digital technologies to create and deliver customer value in tourism.

The prototype of many ways of identifying a set of values in an enterprise was the concept of the value chain of M. Porter [22]. The value chain is a pictorial definition of the sequence of activities related to the production of products. These include activities such as internal logistics, operations, external logistics, marketing, sales and service. The value chain is complemented by four auxiliary activities, which include the company's infrastructure, human resources management, technology development and procurement. The presence of several converging elements of the value chain and business models, especially value propositions [23], is also underlined. At this point, it is also worth mentioning the reverse value chain business models, i.e., new value chains that start with the customer and end with resources and competences [24]. A. Kabalska and A. Kozarkiewicz [25] cite the concept of a constellation of values by R. Normann and R. Ramirez [26] and its development into a grid of values by C. Parolini [27,28], as well as A. Weinstein's web of values [29]. In a similar context, Kabalska and Kozarkiewicz's research results are discussed by B. Quattrociocchi et al. [30], who analyse the relationship between the tourism supply chain and strategic partnership.

The values generated and captured by enterprises find their symbolic place at the centre of most business models. W. Rudny [31] points to the value proposed to the customer as the central category of long-term decision-making processes in an enterprise, which is one of the features common to all business models. Regardless of the adopted methodological framework [3,31–34], the structure of each model will be similar in this respect because the proposed value is an element that gives sense to running a business or simply carrying out a project by the organization. However, it should be noted that there are many ways to represent and share values within an organization.

One of the divisions present in the literature is a three-element division of values: the value proposed to the customer, the value captured by the enterprise and the social value [4]. The first two values were included in the models almost from their development. The value proposed to the customer was at the forefront, as their needs are generally to be satisfied by the modelled business. The values captured by the enterprise are either omitted from the model and included in the company's strategy or intertwined in a dispersed manner within some model components, e.g., in revenue streams (profits), in key activities (acquiring new markets) or in market segments (market share).

However, with the spread of the concept of sustainable development [35–40], especially of sustainable business models [41–47], the set of values included in business models has gained a new component in the form of social value, based on the concept of sustainable value [48]. Social value is understood here as the value that an organization tries to achieve by acting in a sustainable manner, generating specific values for the local society. Sustainable value results from the integration of economic, environmental and social value [48]. Interesting research results in this area are presented by E. Parga Dans and P. Alonso González [49], who distinguish a different group of four values: existential, aesthetic, economic and legacy. While J. M. Ramos-Henríquez et al. [50] notice that the peer-to-peer platform value proposition can be decomposed into three components: shared resources, the value package and communications.

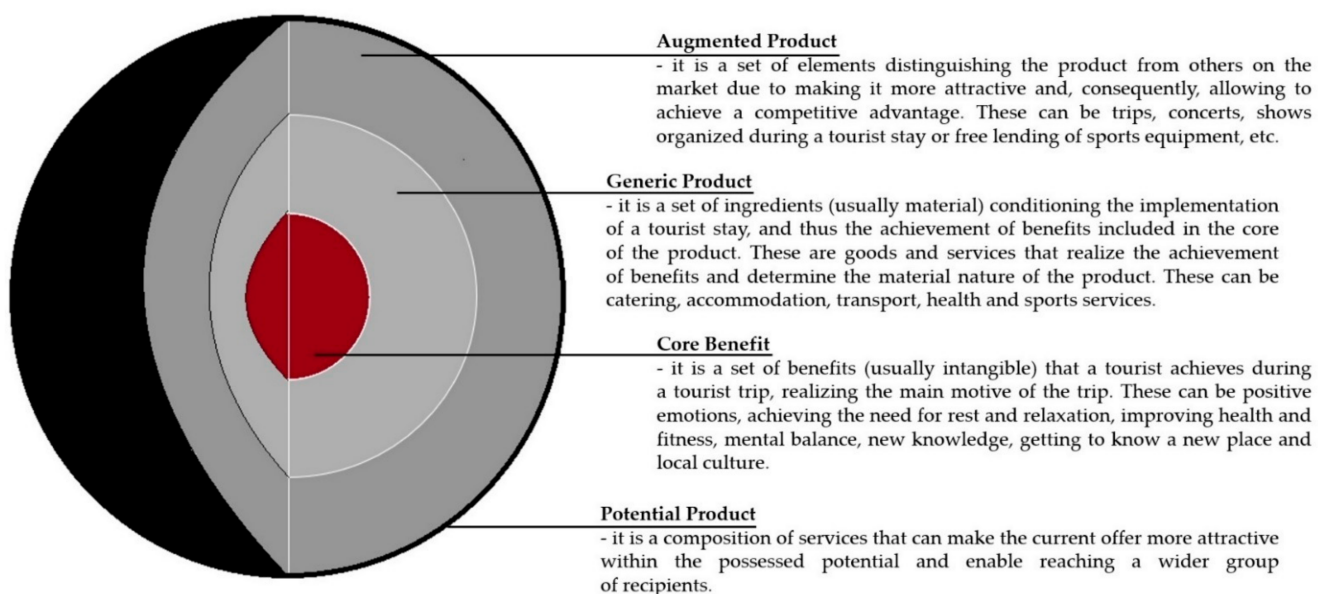
In the context of the social value of cultural heritage tourism objects, one can refer to the interesting concept of creating shared value (CSV) by Porter and Kramer [51]. CSV focuses on “politics and operating practices that enhance the competitiveness of a company while simultaneously advancing social and economic conditions. It is possible to form business strategies that lead to the creation of social and economic value at the same time [52].

In the opinion of many researchers [47,48], the essence of sustainable business models is taking into account not only the adopted areas determining the scope of creating value propositions but also the needs of stakeholders at the same time. Therefore, it is necessary not only to define a value category but also to define the needs of customers, investors and shareholders, employees, suppliers, partners, the environment and the society [53]. However, their interests then become inseparable. Due to the fact that there are doubts about the feasibility of achieving such an assumption, it is worth paying attention to the research by C. Carrasco-Farre et al. [54], who prove that it is possible and beneficial under conditions of mutual adjustment and business model adaptation, although it is a complex and gradual process. M. Pellicano et al. [55] described an example of a model based on stakeholder engagement and value co-creation.

A. Cammarano et al. [56] present interesting results of research on the state of the art of sustainable practices within supply chains by employing data collected from the repository “Business Process Framework for Sustainability”. They noticed among other things that the tourism industry supports Sustainable Development Goal (SDG) No. 8, i.e., Decent work and economic growth, by orienting customers towards ethical food consumption; promoting local culture; offering local and organic products; and purchasing food that is locally produced, eco-certified or fair-trade. Similarly, C. H. Chin et al. [57] refer to the management of a tourist area in the context of sustainable development but this time in relation to rural tourism.

Achieving the goals underlying this article required the analysis of the value propositions generated and captured by modelled businesses in the form of value proposed to the customer, captured value and social value. The reason for this is both its simplicity related to the limitation of groups of values to three basic categories and the flexibility that allows for defining social value in the context of the concept of sustainable value [48]. The selected tripartite division of values also enables the integration of the identified values with the product model known in tourism, known as the atomic model of the tourist product [16,54]. The construction of this heuristic model was based on Ph. Kotler’s Five Product Level Model [58], including: core benefit, generic product, expected product, augmented product and potential product, but the model applies to tourists as well. The developed heuristics (Figure 1) can describe the products offered within various forms of tourism.

#### MODEL OF TOURISM PRODUCT



**Figure 1.** The atomic structure of a tourist product.

Although the atomic structure of a tourist product contains a different classification of values and narrows the scope of obtaining benefits to the offered product, it basically presents a similar logic of conduct, in which the core of benefits is surrounded by elements implementing it in the material dimension. It is worth noting, however, that the progress in detailing such models is so great that it should be expected that in the near future, the form of a tourist product will not be based on an atomic structure but a quark structure (continuing the practice of linguistic borrowings from the field of physics).

### 2.3. Open Innovation

An important element in tourism activity is also the innovativeness of a tourism enterprise as this enables achieving competitive advantage. According to M. J. Ruiz-Ortega [59], innovation capability is a key antecedent of pioneering orientation in tourism enterprises. The possibility of participation in the mutual transfer of knowledge and then the application of the acquired social or technical innovation in the creation, protection and sharing of cultural heritage are of particular importance in this context. However, the practical dimension of knowledge transfer is based on the use of open innovation.

M. Pichlak [60], based on the source literature, highlights that open innovation as a new paradigm in innovation management, meaning the use of the intended inflow and outflow of technical knowledge, includes two main processes of creating economic value. The first is the external acquisition of technical knowledge, that is, technology exploration, and the second process is the external use of that knowledge, that is, technology exploitation (p. 284).

Of course, this division is determined by the fundamental assumptions of the concept of open innovation. The concept, developed by H. Chesbrough [61–65] and also developed by many other researchers [66–71], is based on two processes, the deliberate inflow and outflow of knowledge. As stated by M. Pichlak [72], the intended inflow of knowledge determines the degree of absorption of the knowledge possessed by various entities in the market environment and may take the form of market research, networking, outsourcing in the context of research and development activities and the acquisition of intellectual property rights. Meanwhile, the intended outflow of knowledge is the degree of knowledge sharing with entities in the market environment. It can take the form of creating new ventures based on the knowledge base of the organization, developing informal ties between employees of different organizations or selling intellectual property rights.

U. Lichtenthaler [73], while formulating a conceptual framework for open innovation, proposes multilevel determinants of the make-or-buy, integrate-or-relate and keep-or-sell decisions in opening up the innovation process. The make-or-buy approach assumes the independent development or external acquisition of new technology or knowledge, in contrast with the keep-or-sell approach, in which the decision concerns a situation in which the entrepreneur has new knowledge or technology at its disposal and should decide whether to use it only for its own benefit or sell it. There is also the third possibility of integrate-or-relate, which is an intermediate solution.

In the context of cultural heritage management, it is worth referring to interesting developments of the concept of open innovation. One of them is an interesting methodology based on a rectangular Yun-Zhao's Compass [74,75] that is then applied in the open innovation knowledge funnel. He analyses four aspects, i.e., over-shooting of the modern business model, expanding the bottom of the modern business model, cultivating the forward neighbourhood of the modern business model and cultivating the backward neighbourhood of the modern business model. Consequently, researchers and managers have gained information that is highly useful for developing innovative business models or innovating existing models, which allows for matching the four types of business model innovation. This seems to be an interesting example of determining the scope of open innovation.

J. J. Yun and Z. Liu [76] also developed a conceptual framework for understanding open innovation micro- and macro-dynamics as a way to achieve economic sustainability.

For this, they used a quadruple-helix model for social, environmental, economic, cultural, policy and knowledge sustainability. J. J. Yun's team [77–79] developed the concept of open innovation and dynamic open innovation in many other directions, e.g., “culture for open innovation dynamics”, which can motivate open innovation dynamics and control open innovation complexity.

J. J. Yun et al. [78] explicitly state that culture has always been a critical driver of innovation, especially of open innovation dynamics. These researchers, referring to various aspects of firm culture, corporate culture and organizational culture, define culture as a pattern of basic assumptions that is invented, discovered or developed by a given group as it learns to cope with its problems of external adaptation and internal integration that has worked well enough to be considered valid. Cultural tourism is undoubtedly one of the next interesting dimensions of entrepreneurship that fit into the concept of open innovation.

The need to explore the issue of open innovation is also noted by M. Perano et al. [80], who undertook developing an innovative conceptual framework focused on the relationship between firms and innovation intermediaries within the service-dominant logic premises by capitalising on the innovative capacities of firms and intermediaries. In their conclusions, they note the great need to better define and refine the set of innovative management capabilities.

The formulated research problem that at the same time determined the aim of this work prompted the author to carry out empirical research in the context of the presented theoretical issues. The description of the research can be found in the next two sections of the article.

### 3. Materials and Methods

Empirical research, the purpose of which was primarily to define the structure of the business models of cultural heritage tourism establishments, was preceded by a literature review on the combined aspects of business models and tourism enterprises, especially cultural heritage tourism entities. On the basis of the accumulated knowledge, it was possible to put forward research assumptions, develop research tools and select analysis tools in order to obtain objective answers to research questions. Additionally, the analysis of the literature takes into account the issues of open innovation in the context of socially and business-justified exchanges of knowledge in this area.

In view of the formulated research problem, it was justified to carry out qualitative research consisting of conducting questionnaire interviews with managers of cultural heritage tourism sites. These objects are associated with the European Route of Industrial Heritage (ERIH), which made it possible to invite all objects for research. After repeating the invitation to the research twice, the consent of almost every fourth subject was obtained. Then, after obtaining research questionnaires, a database was created, data were analysed and then conclusions were drawn.

The survey was conducted in the form of interviews at 73 heritage tourism sites across Europe, representing 23.3% of all European heritage tourism sites. The majority came from Germany (30.1%), Spain (21.9%) and Great Britain (9.6%), but others came from Poland (5.5%) and Sweden, Portugal, France, Norway, Italy, Luxembourg, Bulgaria, Finland, Slovenia, Croatia, the Czech Republic, Ireland, Ukraine, Austria and Belgium. Reaching the sites was possible thanks to their association in the European Route of Industrial Heritage. The research was carried out from December 2021 to January 2022 using a research questionnaire sent to the sites by e-mail. It contained 54 questions. The reliability of the research tool was verified using Cronbach's alpha, which exceeded the critical value of 0.7 after replacing the missing quantitative data with average values.

The research covered eight economic aspects, but the main topic was the identification of the structure of the business models of cultural heritage tourism sites. In this article, the obtained research results were narrowed down to the values generated and captured by the sites. The remaining issues discussed in the research will be the subject of further scientific publications. The data were collected as part of the research work of the Department of

Computer Science and Economics of the Silesian University of Technology as part of the work of the team composed of A. R. Szromek, M. Naramski and K. Herman.

Some of the issues raised in the questionnaire required an assessment of the potential values that should be included in the model. Managers of the studied sites assessed the occurrence of individual values in their business models using a 5-point Likert scale. This way, the significance of individual elements of the model was determined. The obtained ratings were transformed by means of quotient transformations, assigning selected opinions to specific evaluation ranks (1 for the extreme positive rating,  $-1$  for the extreme negative rating,  $-0.5$  and  $0.5$  for intermediate ratings and  $0$  for neutral ratings). This way, partial scores were obtained that were then averaged to obtain an average rating scale in the range of  $-1$  to  $1$ .

The collected data in the form of a database were subjected to statistical analysis. In the analysis of the collected data, various methods of statistical analysis were used ranging from descriptive analysis (arithmetic mean and standard deviation), through correlation analysis (Karl Pearson linear correlation coefficient and causal diagrams) and ending with multidimensional data mining techniques, i.e., logistic regression.

#### 4. Results

The results of the research were divided into two parts. The first one covers the obtained proposed value structure, according to the division into the three mentioned groups of values, i.e., the value proposed to the customer, value captured by the enterprise and social value. In the second part, the tendency to exchange knowledge through sharing and using it in the form of open innovation and the implications resulting from it were defined.

##### 4.1. The Tripartite Division of Values in Business Models

The three-element division of generated, captured and social value, adopted on the basis of the literature, was used for their actual identification in business models of tourist sites. Additionally, a variable differentiating sites according to their ownership form (public, private, nongovernmental organizations) was taken into account. Table 1 presents the individual identified values in each category.

It is worth noting that almost all customer-oriented values received positive feedback from managers. Values with an average rating of at least  $0.2$  were considered particularly important. The values aimed at satisfying the cognitive needs of customers were highly rated ( $0.76$ ), while the values satisfying the needs of rest, hunger and thirst were rated quite low ( $-0.11$ ). However, this is the result of a specific profile of tourism activity, the aim of which is not so much to offer leisure to guests but to make cultural heritage available. There is, however, a noticeable agreement among the assessments according to the site ownership with one slight exception.

A slightly smaller differentiation is observed in the case of values captured by the enterprise. The average ratings for individual items are slightly lower than before, but at the same time, there is no negative rating. Four items were rated the highest: positive reviews of tourists ( $0.56$ ), satisfaction with the implementation of the mission of the site ( $0.51$ ), satisfaction with building a network of business clients or institutions ( $0.46$ ) and acquiring new markets and customer groups ( $0.39$ ). The results obtained for the group of public sites are noticeably lower than in the case of private ones. The difference was not discernible for the value proposed to the customer.

The case is different for values generated with the local community in mind. This time, higher scores are observed in the case of sites that are nongovernmental organizations. The most popular social values turned out to be promoting the historical industrial heritage of the area ( $0.79$ ), fulfilling the symbolic role of the area ( $0.71$ ), organizing tourist traffic to preserve the industrial heritage ( $0.54$ ), activating the local community ( $0.50$ ) and diversifying the economic potential ( $0.49$ ). However, it is worth noting that among the social values, there is no one rated below  $0.26$ , which indicates the high importance of this group of values.



**Table 1.** The importance of value propositions in the business models of heritage tourism facilities.

| The Importance of Value Propositions in Business Models<br>(Scale from −1.0 to 1.0) | General | Private      | Public      | Nongovernmental Organization |
|---|---------|--------------|-------------|------------------------------|
| <b>Values proposed to customer</b>  |         |              |             |                              |
| Satisfying cognitive needs  | 0.76    | 0.78 ± 0.29  | 0.73 ± 0.29 | 0.81 ± 0.33                  |
| Satisfying the complementary needs of customers                                     | 0.34    | 0.37 ± 0.55  | 0.37 ± 0.44 | 0.27 ± 0.53                  |
| Satisfying cultural needs   | 0.24    | 0.20 ± 0.59  | 0.27 ± 0.56 | 0.04 ± 0.48                  |
| Satisfying the needs of relaxation  | 0.10    | 0.06 ± 0.53  | 0.16 ± 0.46 | −0.08 ± 0.53                 |
| Satisfying the needs of rest, hunger and thirst                                     | −0.11   | −0.17 ± 0.59 | −0.1 ± 0.56 | 0.00 ± 0.58                  |
| <b>Values captured by the enterprise</b>  |         |              |             |                              |
| Brand strengthening   | 0.56    | 0.65 ± 0.30  | 0.56 ± 0.29 | 0.54 ± 0.32                  |
| Satisfaction with the implementation of the mission                                 | 0.51    | 0.56 ± 0.25  | 0.47 ± 0.40 | 0.54 ± 0.38                  |
| Satisfaction of business customers (institutions)                                   | 0.46    | 0.50 ± 0.28  | 0.43 ± 0.33 | 0.5 ± 0.35                   |
| New markets, customer groups  | 0.39    | 0.46 ± 0.34  | 0.34 ± 0.37 | 0.46 ± 0.32                  |
| Operating income (profit)   | 0.20    | 0.41 ± 0.52  | 0.07 ± 0.53 | 0.38 ± 0.46                  |
| Acquisition of new exhibits/historical objects                                      | 0.08    | 0.09 ± 0.56  | 0.13 ± 0.53 | −0.12 ± 0.65                 |
| <b>Social values</b>  |         |              |             |                              |
| Promotion of historical industrial heritage   | 0.79    | 0.78 ± 0.25  | 0.8 ± 0.27  | 0.85 ± 0.24                  |
| Acting as a symbol of the area  | 0.71    | 0.74 ± 0.35  | 0.68 ± 0.37 | 0.85 ± 0.24                  |
| Organization of tourist traffic so that the industrial heritage is preserved        | 0.54    | 0.54 ± 0.54  | 0.5 ± 0.48  | 0.54 ± 0.48                  |
| Involvement/activation of the local community                                       | 0.50    | 0.52 ± 0.35  | 0.51 ± 0.36 | 0.46 ± 0.52                  |
| Diversification of economic potential   | 0.49    | 0.56 ± 0.47  | 0.40 ± 0.50 | 0.58 ± 0.34                  |
| Revitalization of post-industrial areas   | 0.39    | 0.37 ± 0.55  | 0.39 ± 0.56 | 0.46 ± 0.43                  |
| Natural environment preservation  | 0.33    | 0.3 ± 0.58   | 0.31 ± 0.47 | 0.04 ± 0.48                  |
| Protection and presentation of local art.   | 0.29    | 0.26 ± 0.61  | 0.33 ± 0.56 | 0.31 ± 0.43                  |

Source: own study.

When analysing the assigned ratings of the significance of the values in each group, it can be seen that the highest average score was obtained for social value (0.5), followed by the values captured by the enterprise (0.37) and then the value proposed to customers (0.26). The breakdown by ownership form reveals that the value proposed to the customer was most relevant for public sites (0.28), then private sites (0.25) and finally for NGOs (0.21). The averages were different in the case of the values captured by the enterprise. The highest scores were noted in private sites (0.44), then nongovernmental sites (0.38) and finally public ones (0.33). Meanwhile, social value had almost the same average ratings in private (0.47), public (0.46) and non-government sites (0.46).

#### 4.2. Tendency for Open Innovation

When analysing the managers' responses to open innovation, 71.4% of them believed that the primary method of revitalizing cultural heritage sites and their business models should be open innovation, i.e., based on mutual knowledge exchange such as sharing the applied solutions with potential investors wanting to set up similar sites. A small proportion, 28.6%, had some doubts about this, but no one denied it.

According to 82.0% of managers, knowledge about the entire revitalization process should be available to all investors. Only 12.0% of managers proposed limiting this knowledge to associated or organized sites on post-industrial tourism routes. Few want to share their knowledge with investors only from the private sector or only from the public sector.

In view of the responses obtained regarding the tendency for open innovation in cultural heritage tourism sites, further analyses of the items included in value propositions were expanded due to this additional dichotomous breakdown, specifically, managers willing to exchange knowledge about the revitalization of sites as part of open innovation and those who agree with such exchange but have some doubts whether access should be



open to everyone. This approach to the explanatory variables made the correlation and logistic regression analysis correct methods of analysis.

Through the logistic regression analysis, it was found that there were significant relationships between the significance of some value propositions included in business models and the degree of confidence in sharing and exchanging knowledge as part of open innovation ( $p < 0.05$ ). The analysis showed three statistically significant results.

The first was the willingness to meet complementary customer needs as part of a value proposed to the customer. The odds ratio in this case was 0.31 ( $p = 0.039$ ), which means that the approach to this solution significantly, that is by 69%, decreased the tendency to share acquired knowledge in the form of open innovation.

The same odds ratio was recorded in the case of acquiring new exhibits or historical objects as part of capturing values by the site ( $OR = 0.31$ ;  $p = 0.016$ ). That is, managers who tried to capture values in the form of new exhibits or objects in their business models usually showed a lower tendency (by 69%) to exchange knowledge as part of open innovation than other managers.

A slightly lower result, although statistically significant, was recorded for the revitalization of industrial areas ( $OR = 0.23$ ;  $p = 0.006$ ) as a social value. Proponents of this solution were even less willing to share knowledge on this subject as part of open innovation. In this case, the tendency to do so decreased by 77% in relation to managers who did not consider this value in their models to be significant.

These findings mean, therefore, that when a site's value proposition included: (1) meeting the non-tourism needs of customers, (2) acquiring new exhibits or (3) the intention to revitalize the site for social purposes, the site managers showed significantly weak support for the exchange of knowledge within open innovation. This probably resulted from the real need to disclose to potential competitors the aforementioned methods of generating and capturing value.

## 5. Discussion

The results of the research conducted among the representations of cultural heritage tourism sites in Europe presented above indicate significant determinants differentiating the structure of value proposition and thus of entire business models. A strong influence of the form of ownership of the studied sites is noticed, as private sites emphasize captured values, while public ones emphasize the value proposed to the customer. Social value, meanwhile, is highly significant for all types of sites, which only proves their extremely important role in the dissemination of cultural heritage, especially in the area of local culture. This finding is also confirmed by the results of other studies. For example, R. Y. Chenavaz et al. [14] not only confirm that cultural heritage activities are subject to fundamental economic laws, in which visitor numbers increase with the attractiveness of the site and decrease with entrance fees, but also underline the importance of heritage conservation policies. The finding also emphasizes the important social values presented next to economic values.

### 5.1. Observed Relationships and Their Causal Diagram

While interpreting the obtained research results, it was noticed that the form of ownership is not the only variable differentiating the responses of managers. Statistical analysis also proved the existence of a statistically significant linear correlation between the level of significance of social value in the form of activation of the local community (involvement/activation of the local community) and the potential tourists served ( $r_{xy} = -0.28$ ;  $p = 0.022$ ).

Similar results were recorded for employment at tourist sites ( $r_{xy} = -0.31$ ;  $p = 0.01$ ). However, the identified associations should not be understood as causation, or perhaps even relationships, but only as a coexistence of two phenomena. The number of employees and the number of served tourists may (but do not have to) result from the size of the tourist site. This is confirmed by very strong and statistically significant relationships between employment and the number of tourists served ( $r_{xy} = 0.89$ ;  $p < 0.001$ ). The more

people the site employed, the more tourists were served. For this reason, it is reasonable to make a hypothetical generalization of the interrelationships. Specifically, an important conclusion resulting from the observation is that larger sites, as expressed in the number of tourists served and the number of people employed, less frequently undertake activities towards the involvement and activation of the local community. Smaller sites more often tried to activate the local community.

The discussion on this topic may be continued by trying to define the causality of the observed and inferred features and the directions of their mutual interaction because it could as well be expected that in sites with a greater human potential, there would be a greater tendency to activate operations among the local community. However, the opposite was true, as evidenced by the negative correlation. The sites with lower employment more often tried to activate residents of the tourist area (Figure 2a). Causal diagrams [81] for this issue should, however, also take into account the other two variables, the influence of which may be slightly greater than just their contribution to the quantification of the site size (Figure 2b).

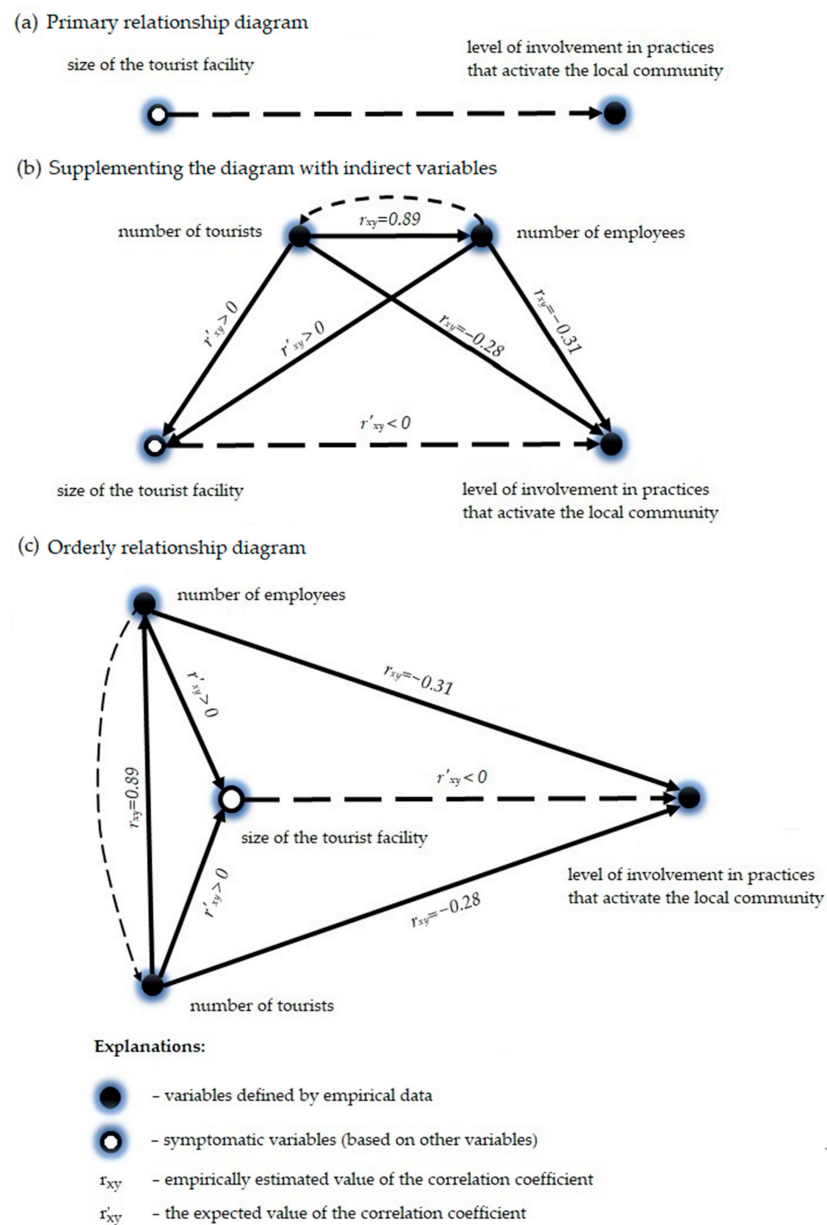


Figure 2. An attempt to develop a causal diagram.

The number of tourists seems to have a direct impact on the number of employees employed in tourist establishments. A reverse cause-and-effect relationship is also possible, as increasing the number of employees allows the site to increase its service potential and to increase tourist traffic in the area. However, according to the principles of causality in the temporal order, the cause should precede the effect, and therefore the main direction is from the number of tourists to the number of employees. Both variables have an impact on the size of the site, and they also directly affect the level of the site's involvement in activating the local community. In this situation, the third version seems to be a better approach to the causality diagram (Figure 2c).

### 5.2. Integrating the Value Proposition and the Structure of the Tourist Product

Returning to the identified value proposition structure in the business models for cultural heritage tourism sites, it should be stated that their classification can be carried out in various ways that are briefly discussed in the literature review, for instance the eight steps by M. Gasparin et al. [17], who propose Slow Storytelling, X. Font et al. [18] and their user-centred design process and even the methodology used to define the Peer-to-Peer Platform Value proposition [50]. An interesting example of the applied solutions is also the case study described by M. Pellicano et. al. [55], which is based on the Destination South Network. The solution described there is the example of a destination branding model based on stakeholder engagement and value co-creation. The theoretical framework of the model is built around three dimensions: the relational view (RV), stakeholder engagement (SE) and value co-creation (VCc).

However, it is worth considering their incorporation into the philosophy of running a business in the field of heritage tourism. It seems reasonable to refer to the marketing foundations of product characterization [58], especially the tourist product [82]. Therefore, an important issue discussed in this article is also characterizing the tripartite division of values appearing in business models in the context of the structure of the tourism product. First, however, it is worth determining the potential components of the structure of a tourism product in cultural heritage tourism sites.

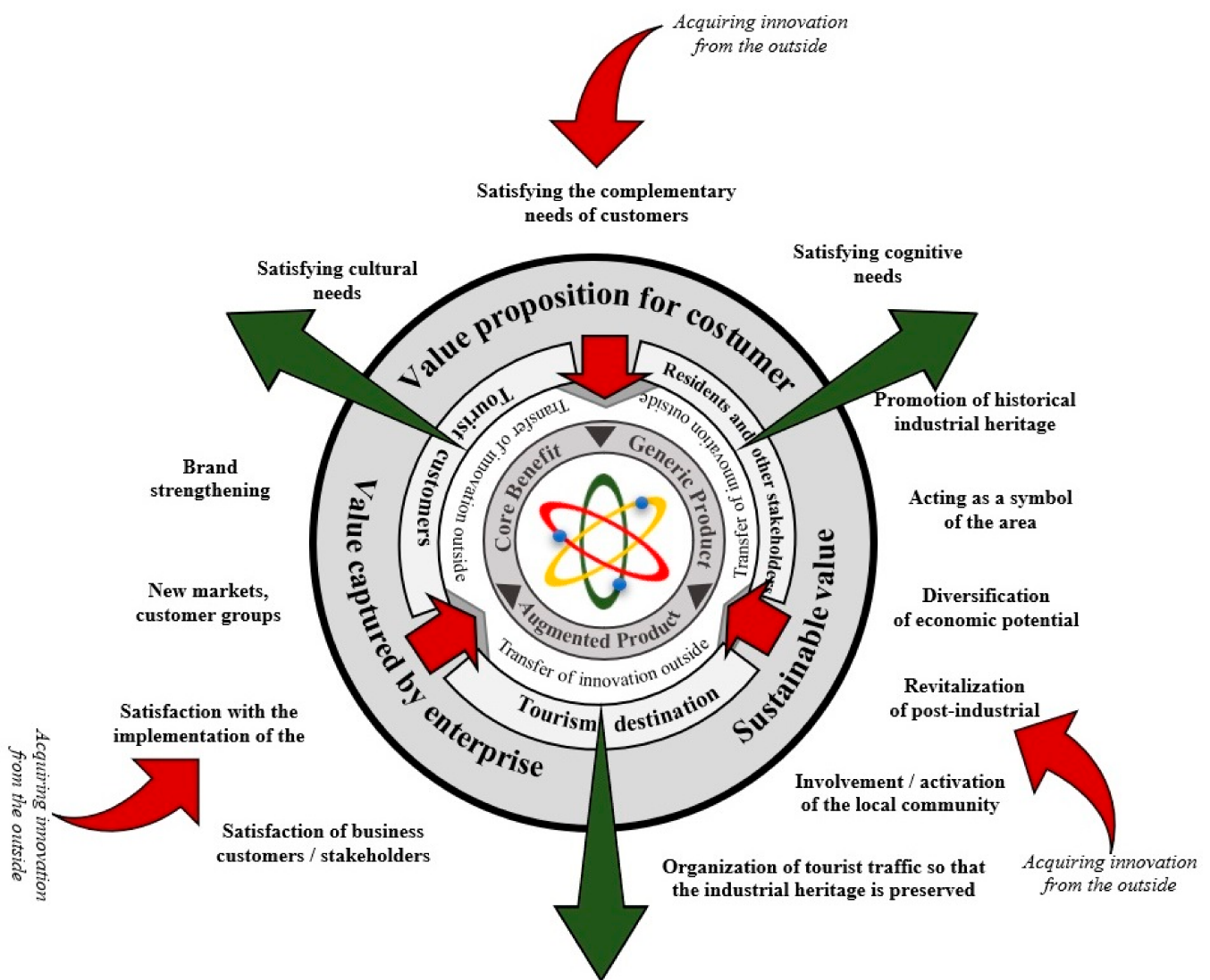
The greatest value for a tourist visiting a place is usually the achievement of the purpose of the trip, i.e., satisfying the need resulting from the for of the tourist trip. In general, it is rest, relaxation, meeting health needs, achieving mental and spiritual balance or meeting cognitive and cultural needs. However, in the case of cultural heritage tourism, the core of the tourism product takes a different order of motivation because here, the most important will be cognitive and cultural goals, and recreational goals will play a complementary role.

In the structure of the tourist product, the basic means of implementing the core benefit should be included in the generic product. It is a set of ingredients that determine the implementation of a tourist stay and thus the achievement of benefits included in the core of the product. Tourist products should include shows, exhibitions, tourist routes, historical narratives or artistic works and their performances.

The augmented product concerns the elements that distinguish it from others on the market. It makes the stay itself attractive and at the same time creates a competitive advantage. Increasing the attraction of the stay may involve many aspects of the everyday lives of tourists, ranging from the company's own services (souvenirs, books) to the services of other entities related to tourism (gastronomy, accommodation, etc.).

As part of a potential product, it is also possible to list several elements that complement the current offer within the scope of the existing potential, benefits that can make the current offer more attractive within its potential and reach a wider audience. Attractions should be tailored to the key segments of this market. This activity can bring many benefits, especially in the off-season.

Thus, the key values of business models identified in the research can be included in the activity in various ways. One of them is the integration of the value proposition and the structure of the tourism product. The integration scheme is shown in Figure 3.



**Figure 3.** The highest-rated values in the business models of European cultural heritage tourism sites with the transfer of innovation.

Undoubtedly, the highest rated social values, values proposed to the customer and values captured by the site should be consistent with the core benefits of the tourism product offered by the site. Others, such as the exhibits and objects themselves should be classified in the group of expected products, and those that complement the offer should be in the group of augmented products.

The product, as a direct instrument of creating and capturing value in the enterprise, requires the close integration of its structure with elements of the business model to avoid the implementation of low-profit or even unnecessary processes and to increase the importance of highly profitable processes. The scheme (Figure 3) captures the complexity of integrating both issues within one business process, as these issues should be considered jointly and at the same time should also take into account elements related to the service of tourist traffic, the development of a tourist destination and solving problems of residents and cooperation with other stakeholders.

### 5.3. Value Proposition and Tendency to Open Innovation

According to the majority of the surveyed managers of cultural heritage sites, the methods of revitalizing cultural heritage sites and their business models should be open innovation. According to the managers, cooperation in terms of using open innovation

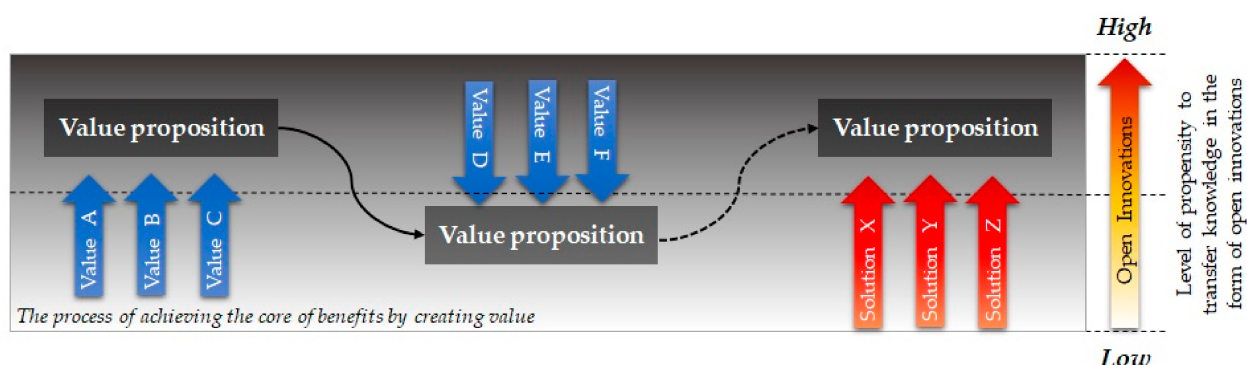


should be based on mutual exchanges of knowledge, sharing the applied solutions with potential investors in a specific cultural heritage. However, it is worth noting that a significant group of managers approached this idea with caution, and, as demonstrated above, their scepticism was significantly related to the growing assessment of the importance of the three values: (1) meeting the non-tourism needs of tourists, (2) acquiring new exhibits and (3) revitalizing the site for social purposes. It can therefore be assumed that the above-mentioned values and the actions to achieve them are often perceived as creating a site's competitive advantage and therefore that managers would be reluctant to consent to their disclosure.

This reluctance could in turn be a significant obstacle in creating open innovation for cultural heritage tourism sites, especially if a competitive site may be created in the neighbourhood based on the shared knowledge. This is why it is difficult to expect that the manager of a site would be willing to share the developed knowledge about an effective method of revitalizing a site that may, in a certain perspective, take the form of a cultural heritage. On the contrary, resistance to sharing knowledge may result from the desire to maintain market barriers that give a competitive advantage to the holder of "know-how". This, however, may be a source of many conflicts, both vertical and horizontal, according to the classification of H. Wang et al. [13].

The creation of open innovation of a social nature may be an exception. Social innovations mainly relate to specific value systems and are not as oriented towards creating economic utility as in the case of technical innovations [83,84]. However, even then, this transfer will be conditioned by, for example, a competitive force against a potential competitor that transfers knowledge (location, size, impact strength). Even if the exchange of knowledge takes place as part of social innovation, e.g., on the basis of local or regional solidarity, or because of ordinary philanthropy towards the local society, it is likely that the entity providing open innovation will put its own survival on the market above the social interest.

It seems that the resistance to the transfer of knowledge in the form of open innovation may be overcome if the entity offering the desired knowledge will be able to obtain a benefit exceeding the expected income from this by the amount of risk compensation related to the removal of competitive barriers. Of course, these may be financial benefits, but not only financial because a precious value may turn out to be a share in the profits of a new venture or even cooperation based on the co-opting of competing sites, bringing an increase in income thanks to an increase in turnover (synergy effect of joint activities) or a reduction in the costs of operations conducted jointly or alternately in different areas. The symbolic course of the impact of the values included in the model is presented in Figure 4.



**Figure 4.** Hypothetical impacts of values in the business model on the course of changes in the tendency of managers to transfer knowledge in the form of open innovation.

The mutual exchange of knowledge between entities for mutual benefit is also possible, and in this case, the forecast of the expected mutual competitive influence of both entities may also turn out to be decisive. Therefore, it is necessary to examine the conditions changing the level of competitive risk.

Yet another solution is to formally limit the scope of knowledge shared in the form of open innovation. This may be for value proposed to the customer and for social value but ignore the captured values. However, such knowledge may also have limited usefulness, which destroys this knowledge transfer.

The proposed solutions are only a set of possible recommendations for counteracting the decline in the tendency to use knowledge transfer in the context of open innovation. The key premise for future research is the conclusion that some values are characterized by closing off the possibility of knowledge transfer (values D-F), which in turn gives rise to the assumption that some values or innovative solutions may open the possibility of knowledge exchange (values A-C and solutions X, Y, Z). Thus, the tendency to transfer knowledge as part of open innovation may depend on the structure of the value proposition and the tourism product. The result may be both the abandonment of knowledge transfer and participation in it but also an indirect form based on its unidirectional dimension.

Referring to the foundations of the concept of culture for open innovation dynamics and the definition of culture quoted by J. J. Yun et al. [78], practicing open innovation in cultural tourism can help to refine a pattern of underlying assumptions that will help to cope with problems in the tourism market.

## 6. Conclusions

The aim of this article was to identify the values present in the business models of cultural heritage tourism sites and the level of willingness of managers of these sites to transfer knowledge as part of open innovation. It was also important to answer the research question of whether there is a relationship between values prioritised by the studied sites and the tendency to use and share knowledge in the form of open innovation?

Based on literature and empirical research, 16 values were identified by managers as very important in their business models. Social values predominated, but the distribution of the importance of individual groups of values indicated a strong dependence on the form of ownership of the site. The value proposed to the customer was most relevant for public and private sites. On the other hand, in the case of values captured by the enterprise, the highest scores were obtained for private and nongovernmental ones. Social value was equally important for private, public and nongovernmental sites, and it scored high in importance in the business models.

Among the values that received the highest marks among managers were value proposed to the customer (e.g., satisfying cognitive needs, satisfying the complementary needs, satisfying cultural needs), value captured by tourism enterprises (i.e., brand strengthening; satisfaction with the implementation of the mission; satisfaction of business customers, new markets and customer groups; operating income) and social value (i.e., promoting historical industrial heritage, acting as a symbol of the area and organizing tourist traffic to preserve the industrial heritage, involving/activating the local community, diversifying economic potential, revitalizing post-industrial areas, preserving natural environments, protecting and presenting local art).

The majority of managers participating in the research were convinced that the methods of revitalizing cultural heritage sites and the business models of these sites should be in the form of open innovation, and four out of five managers believed that knowledge about the total revitalization process should be available to all investors without restrictions. Moreover, the research made it possible to identify three values differentiating the attitude of managers to sharing knowledge in the form of open innovation. Thanks to this, it was possible to answer the research question and to indicate not only whether the identified values related to the tendency to transfer knowledge in the form of open innovation but also which of these showed such a relationship.

The weakness of the research carried out is the inability to deepen the acquired knowledge, which results from the fact that it was conducted during the COVID-19 pandemic. As it was impossible to talk with managers directly, it was also impossible to carry out



in-depth interviews, e.g., with regard to doubts in the use and sharing of knowledge with investors. It is to be hoped that further research will provide such a possibility.

An important problem was also the refusal to participate in the research of many invited sites, which resulted in the lack of sufficiently diverse answers to the question regarding the attitude towards using and sharing innovation. Among all the respondents, no opponents of open innovation were found, which hinders the precision of the analyses.

The perspective of future research based on the results obtained here indicates the need for in-depth analysis towards identifying other components of business models and determining the scope of knowledge subject to exchange as part of sharing and using open innovation. Undoubtedly, this knowledge would complement the discussed topic and could allow for a precise outlining of the reasons for the doubts of some managers of cultural heritage tourism sites regarding sharing revitalization methods as part of open innovation. It may also be interesting how the location, and even more so, the distance from another site, affects the tendency of managers to share knowledge about the revitalization of the sites they manage.

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