

Original article

Identification of the tangible immovable cultural heritage for the development of local tourism. Matanzas case



Identificación del patrimonio cultural tangible inmueble para el desarrollo del turismo local. Caso Matanzas

Identificação do patrimônio cultural tangível imobiliário para o desenvolvimento do turismo local. Caso Matanzas

Arlett Medina Rodríguez¹  0000-0001-8570-723X  arlett.medina@umcc.cu

Jensy Tanda Díaz¹  0000-0002-0214-7888  jensy.tanda@umcc.cu

Roberto Carmelo Pons García¹  0000-0002-0836-8323  roberto.pons@umcc.cu

Yanlis Rodríguez Veiguela²  0000-0001-6220-0209  yveiguela@gmail.com

¹ University of Matanzas "Camilo Cienfuegos". Faculty of Business Sciences. Matanzas, Cuba.

² University of Matanzas "Camilo Cienfuegos". Vice-Rectorate. Matanzas, Cuba.

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ABSTRACT

The tangible immovable cultural heritage is made concrete in the constructions or the set of them made by the man from the prehistory until the present time that represent the identity of the city. Matanzas is an example of city that possesses a high wealth as for cultural and patrimonial values that are sample of identity. As a result of the need for cities to adapt to the new changes existing worldwide, tourist destinations emerge, which must consolidate their identity in order to differentiate themselves from other cities and respond to the demands of the market. The purpose of this research is to identify the tangible immovable cultural heritage in terms of local tourism development. It is of an exploratory-descriptive type and uses theoretical and empirical methods that validate the

procedure and its practical application in the city of Matanzas. Among the main results are: the application of the designed procedure in the case of the city of Matanzas, which allowed establishing the most identifying manifestations for its valorization and the integration of all the organizations that govern the immovable tangible cultural heritage in that city, which makes possible the modeling of the guidelines for the development of local tourism.

Keywords: urban management; tangible cultural heritage; heritage identification; local tourism.

RESUMEN

El patrimonio cultural tangible inmueble se concreta en las construcciones o el conjunto de ellas hechas por el hombre desde la prehistoria hasta la época actual que representan la identidad de la ciudad. Matanzas es un ejemplo de ciudad que posee una elevada riqueza en cuanto a valores culturales y patrimoniales que son muestra de identidad. A partir de la necesidad de que las ciudades se adapten a los nuevos cambios existentes a nivel mundial, surgen los destinos turísticos los cuales deben consolidar su identidad para así diferenciarse de otras ciudades y responder a las exigencias del mercado. Esta investigación se propone identificar el patrimonio cultural tangible inmueble en función del desarrollo del turismo local. Esta es de tipo exploratoria-descriptiva y utiliza métodos teóricos y empíricos que validan el procedimiento y su aplicación práctica en la ciudad de Matanzas. Entre los principales resultados se encuentran: la aplicación del procedimiento diseñado en el caso de la ciudad de Matanzas, lo que permitió establecer las manifestaciones más identitarias para su puesta en valor y la integración de todas las organizaciones que rigen el patrimonio cultural tangible inmueble en dicha ciudad, lo que posibilita la modelación de las pautas para el desarrollo del turismo local.

Palabras clave: gestión urbana; patrimonio cultural tangible; identificación patrimonial; turismo local.

RESUMO

O património cultural tangível imobiliário consiste nas construções ou grupo de construções feitas pelo homem desde a pré-história até aos dias de hoje que representam a identidade da cidade.

Matanzas é um exemplo de uma cidade que possui uma grande riqueza de valores culturais e patrimoniais que são um sinal de identidade. A necessidade das cidades se adaptarem às novas mudanças globais levou ao aparecimento de destinos turísticos que devem consolidar a sua identidade para se diferenciarem das outras cidades e responderem às exigências do mercado. Esta investigação tem como objetivo identificar o património cultural tangível imobiliário em termos do desenvolvimento do turismo local. É exploratório-descritivo e utiliza métodos teóricos e empíricos para validar o procedimento e a sua aplicação prática na cidade de Matanzas. Entre os principais resultados estão: a aplicação do procedimento concebido no caso da cidade de Matanzas, que permitiu estabelecer as manifestações mais identificadoras para a sua valorização, e a integração de todas as organizações que regem o património cultural tangível imobiliário na cidade, o que permite modelar as orientações para o desenvolvimento do turismo local.

Palavras-chave: gestão urbana; património cultural tangível; identificação do património; turismo local.

INTRODUCTION

Twenty-first century cities are facing various problems that increasingly affect society. Among them, the accelerated and growing process of globalization and urbanization stand out. The latter is a key phenomenon of this century because it is in cities that demographic, economic and social transformations are taking place. Currently, cities need to take on these transformations in line with the demands of the global context, and have therefore had to rethink their objectives and seek new management alternatives that guarantee a certain level of competitiveness (Ramos Vecino et al., 2020; Rodríguez Veiguela, 2016; Rodríguez Veiguela et al., 2019). One element that enhances the search for the aforementioned alternatives in terms of economic and social development is the development of local tourism. This contributes to the city's competitiveness in the midst of a changing market. In this sense, the city must differentiate itself from its competitors, so the use of its heritage becomes a key aspect.

Heritage is understood as a legacy that integrates monuments and sites of great natural and cultural wealth that belong to a society. In general, heritage is classified into natural heritage and cultural heritage; within cultural heritage there is tangible cultural heritage and intangible cultural heritage.

The heritage of cities is built progressively through their own historical development, so that it reflects the distinctive elements of the city. This is why its identification is essential for the development of local tourism. In particular, the Tangible Cultural Immovable Heritage (TCIH) is composed of monuments, groups of buildings and sites that have historical, aesthetic, archaeological, scientific, ethnological or anthropological value. It takes the form of constructions, or as a whole, made by man from prehistoric times to the present day, and is an important resource that must be preserved for future generations (Varona López et al., 2020).

Heritage is one of the resources that localities have to provide experiences to those who visit them, since these are a reflection of the history of the place and its identity. They bring recognition to the cities to differentiate them from others and generate motivation for their visit. For these reasons, heritage is one of the most important resources available for the development of localities; its revaluation makes it possible to keep alive the identity of cities, which can be used for the development of local tourism (Coello Gaviño & López Sánchez, 2018; Duis, 2018; Picco, 2021).

Heritage management requires the cohesion of all the stakeholders involved in this process (Cantú Martínez, 2018; Salim Cerqueira, 2021). So, cities must achieve an articulation between their institutions that allows the exploitation of the potential of heritage under local tourism as a way for the economic development of the city itself.

Small-scale sustainable local tourism, approved by the Cuban State as one of the policies for territorial development in Cuba (Betancourt & Rugh, 2020) approved by the Cuban State as one of the policies for territorial development in Cuba, is considered an activity that can have an accelerated growth, both in the state and private sectors, considering its international behavior, contributing to local economies and complementing the conventional Cuban macro-products and tourism offers that have predominated so far in the management of tourism activity, from the Ministry of Tourism (Ramírez Pérez et al., 2020).

In the city of Matanzas, since its declaration as a tourist destination, the city is working on its development for tourism, so the need arises to identify the TCIH because of its importance as a reflection of the locality, which allows the creation of authentic tourist products. The objective of this work is to identify the immovable tangible cultural heritage as a function of the development of local tourism.

MATERIALS AND METHODS

To achieve the proposed general objective, the research uses the following theoretical methods: Historical-Logical to know the foundations and evolution of the different positions regarding heritage and tourism, especially on tangible cultural heritage and its relationship with tourism; Analysis and Synthesis that made it possible to reach conclusions based on the different sources, from the study carried out on the subject under research and to appreciate its valuation from different theoretical positions, and Inductive-Deductive allowed to move from the general to the particular and vice versa, by establishing the links between the different elements related to the identification of cultural heritage and its valorization for tourism.

In addition, the following empirical methods were applied: Consultation of documents, used in the review of specialized literature, international agreements and the guiding documents of the Cuban policy of culture, heritage and tourism to extract the necessary information related to the object of research; Observation, in order to obtain information from the bearers of the heritage, as well as on the conservation of the tangible heritage in the locality under study; Interview to obtain information on the level of participation and involvement of social actors; Survey applied to stakeholders in order to establish the relationship between heritage and tourism.; as well as Expert consultation was applied to theoretically validate the procedure.

The mathematical statistical methods applied were Descriptive statistics used to process the results obtained from the diagnosis and the practical evaluation of the procedure by means of tables and graphs and Non-parametric statistics, which allowed the assessment of the procedure by means of the Delphi Method, Kendall's coefficient, comparison of proportions, IADOV logic table and Anochi coefficient.

RESULTS AND DISCUSSION

The procedure to be used was designed to identify the tangible immovable heritage of a city for its tourism development. For this purpose, other procedures related to the subject, found in the literature, were considered, which act as background for the proposed one, from which the corresponding stages and steps were elaborated and the techniques most used by the different authors in the studies reviewed were defined to comply with the research objectives.

Stage I: Group of Experts on Tangible Cultural Immovable Heritage (GETCIH)

The objective of this stage is to form the GETCIH, a coordinating body for the sectors involved in the management of tangible cultural heritage, the owners and managers of the TCIH.

Step 1. Creation of the GETCIH in the city

Task 1. Establish the structure of the GETCIH.

Task 2. Organization and scope of the GETCIH.

Vision: To be a coordinating organization between the areas of tangible cultural heritage, positioned and recognized in the city in five years in terms of tourism development.

Mission: Management unit of the city's TCIH for the development of local tourism.

Members:

- 1 member of the Provincial Directorate of Patrimony
- 1 member of the Provincial Government
- 1 member of the Provincial Directorate of Physical Planning
- 1 member representing the owners in their personal capacity of the TCIH
- 1 member of the Community Managers of the TCIH
- 1 member of the City Historian's Office
- 1 member of the City Conservator's Office

In all cases, they shall be elected by the organizations or groups they represent.

Objective: Manage and identify the tangible cultural heritage for the development of tourism in the locality through research for the safeguarding and diversification of the cultural offer.

Internal organization: Director elected by the members.

Functions: To be an instance of technical coordination between the areas of tangible cultural heritage.

- To be a link between the community and public institutions
- To be an entity of institutional cooperation in the city under study
- To Recover the tangible cultural heritage through the enhancement of the city's value
- Visibility and recognition of TCIH carriers

Decision Making: By consensus.

Step 2. Characterization of the city study area

Task 1. Historical-geographical description of the city.

The city, provincial capital, is located on the north coast, in the northwestern portion of the province of Matanzas, in the municipality of the same name, at coordinates 23° 02' 50' LN and 81° 35' 00' LW". To the north, it limits with the Heights of La Cumbre, El Estero and the Valley of the Yumurí River; to the south, with the area of the plateau; to the east-northeast it limits with the Bay of Matanzas and the Canímar River, and to the west the hydrographic basins of the Yumurí and San Juan rivers, as a significant exponent the Yumurí Hill. It covers an area of 28 km².

In other times, Matanzas was considered one of the most modern cities in America due to the characteristics of its conception, the regular Renaissance layout and the foundational planning. Later, its privileged location and the dissimilar physical and economic elements favored its progress and gave it an original personality, which stands out in the geo-historic landscape of the Cuban archipelago.

Solid masonry buildings appeared, as well as beautiful and comfortable wooden houses that formed an unrepeatable, unique and uniform ensemble, which transcended the limits imposed by the San Juan and Yumurí rivers. Vernacular architecture proliferated in the neighborhoods of La Marina and Pueblo Nuevo, where the seed of traditions and religions brought from Africa by the slaves took root. Later, in the period between 1840 and 1867, Matanzas reached its greatest cultural splendor. In this city, a peculiar phenomenon took place, since the economic opulence reached by the sugar industry was joined to the sensibility of its inhabitants towards art. Thus, the enlightened Creole bourgeoisie invested a good part of its profits in magnificent and solid constructions of domestic use and of social-recreational character, with which education, literature, musical, theatrical and dance art were fomented.

However, after 1902, Matanzas suffered a generalized stagnation that limited the development of new urban areas and modern constructions.

The foundational square remained unchanged for that reason, free of tall buildings, which is one of the peculiarities of its historic center in comparison with other Latin American cities. Although the effects of urban depredation and the accumulated deterioration due to the scarce conservation actions are evident, the amount of built heritage that has survived is still surprising.

Task 2. Preparation of the heritage map in the geographic system of the city.

The preparation of the map makes it possible to locate the heritage potential of the city; for this purpose, a scale is used to identify the zones from high heritage potential to low potential (Fig. 1).



Fig. 1 - Heritage potential of the city of Matanzas

Source: Own elaboration

Step 3. Analysis of current public policies for the sectors involved in heritage conservation and management in the city

Task 1. Analysis of the city government system.

At the international level, the Universal Declaration on Cultural Diversity of 2001 in articles 1, 4 and 7 recognizes that culture characterizes groups and societies, acquires diverse forms through time and space; it establishes the relationship between cultural diversity and human rights, cultural heritage as an entity of creation, but which develops fully in contact with other cultures. The city's system of government in terms of ordinances referring to the city's tangible cultural heritage, its management and enhancement, is governed, as in the whole country, by the legislation in force for the protection of cultural heritage, established by the National Council of Cultural Heritage and the Ministry of Culture, protected by the Constitution of the Republic of Cuba in Article 39, paragraphs H and I: The State guides, encourages and promotes education, culture and science in all its manifestations.

Task 2. Analysis of the macro and micro environment of the city.

This task analyzes the macro and micro environment of the city by analyzing factors that influence the conservation and management of the TCIH.

The high impact factors are established and the opportunities and threats of the environment are selected, as well as the strengths and weaknesses of the sector (SWOT), in order to establish short, medium and long term strategies. The comparative evaluation is established on a scale of: (5) Strong impact, (4) Medium to strong impact, (3) Medium impact, (2) Small impact and (1) No impact.

This analysis in its application to the city of Matanzas shows the following results:

Strengths:

- S1) Total interest by social actors in the conservation of the TCP
- S2) Existence of an organization that involves all social actors of the city for the management of the TCP
- S3) Direct influence on the TCP by social decision-makers
- S4) Decision-makers and key stakeholders agree on the criteria for TCP management
- S5) Creation of the Office of the City Conservator and Historian
- S6) The trend towards joint work between cultural institutions and the community

S7) The existence of cultural institutions interested in the conservation of the TCP

S8) Declaration of the city of Matanzas as a tourist city by the Ministry of Tourism

Weaknesses:

W1) Little influence of key social actors on TCP decision-making

W2) Communication between social actors is insufficient

W3) Low awareness of key stakeholders on the elements of the TCP

W4) Insufficient understanding by decision-makers that the TCIH urges community work

W5) Insufficient coordination and integration of cultural and educational institutions in the territory to face the process of safeguarding the TCIH

Opportunities:

O1) Decree 118 of the Executive Committee of the Council of Ministers. Regulations for the execution of the Law for the Protection of Cultural Heritage of September 23, 1983

O2) The quality of the theoretical-methodological and practical preparation of a large number of specialists from cultural and educational institutions in the country

Threats:

T1) Placement of discordant structural and decorative elements

T2) Placement of carpentry elements discordant with the typology of the buildings

T3) Dismantling of wooden decks in good condition or recoverable to replace them with reinforced concrete elements

T4) Substitution of pavements of high quality and/or heritage value for others of dubious quality for the sake of a false modernism

T5) Modification or elimination of structural and/or decorative elements in facade

Once the SWOT analysis has been carried out, the strategic positioning of the city is established, being in a state of survival. To this end, the general strategic solution is structured, taking into account the main aspects of the matrix:

- Main strengths: Creation of the Office of the Conservator and Historian of the city
- Main weakness: Insufficient coordination and integration of cultural and educational institutions in the territory to address the process of safeguarding the TCIH
- Main opportunity: The quality of the theoretical-methodological and practical preparation of a large number of specialists from cultural institutions and teachers in the country
- Main threat: Modification or elimination of structural and/or decorative elements on the facade

General strategic solution: If the city achieves sufficient coordination and integration among the cultural and educational institutions in the territory to face the process of safeguarding the TCIH and relies on the Office of the City Conservator and Historian, it could take full advantage of the cultural institutions interested in the conservation of the TCIH to mitigate the effects caused by the modification or elimination of structural and/or decorative elements on the façade.

Stage II: Social stakeholders (SAs in Spanish) involved in the city

Step 1. Level of participation of the social stakeholders involved in the city

Task 1. Conceptualization of the criteria to identify SAs and their level of participation in the city.

These criteria are established as follows:

- Analysis of interest, power, position and influence
- Qualitative analysis of social actors on other social actors, adopting predominant relationships: interest (sector consulted); power (communication between stakeholders); position (organization) and influence (decision making)

Task 2. Conduct interviews with key decision-makers in the territory.

The interview to the AS decision makers of the TCIH in the city of Matanzas was applied to 7 people with decision-making power in the entities involved in the heritage areas and to a sample of 10 owners and managers of the TCIH in the city, based on the database available at the Provincial Heritage Office at this time and on direct observation by the authors.

The work with the SAs started from the moment the city's TCIH was identified, a process that requires trust, respect and, above all, willingness on the part of the authorities, owners and managers, the population, in this case the working group.

The results obtained made it possible to identify the direct and indirect social stakeholders involved in the areas of heritage in the city of Matanzas:

- 100% of the SAs decision-makers consider that their organization, due to the functions it performs, has a direct impact on the management of the TCIH. The mean for this variable is 1.00 with no standard deviation. In the case of the key SAs, they consider that their role as managers of the TCIH directly contributes 30% to the conservation of the city's heritage and 70% indirectly, showing for this case a mean of 1.70 and a standard deviation of 0.483.
- 100% of the deciding and key SAs agree on the interest of preservation, enhancement and recovery of the TCIH in the city; in both cases, with a mean of 1.00 and no standard deviation.
- Regarding communication between the decision-makers involved in the management of the city's TCIH, 71.42% considered it to be good and 28.57% considered it to be average, with a mean of 3.29 and a standard deviation of 0.488. Of the key SAs, 20% rated communication between decision-makers and key social actors as very good, 70% rated it as good and 10% rated it as fair, with a mean of 2.90 and standard deviation of 0.568.
- Regarding the existence of an organization that manages and involves the social actors for the management of the TCIH in the city, 85.71% of the decision-makers consider that it exists and 14.28% consider that it does not exist, with a mean of 1.14 and a standard deviation of 3.78. With respect to the key SAs, 40% point out that it does not exist and 60% point out that there is an organization that manages and involves all the social actors of the TCIH, with a mean of 1.40 and a standard deviation of 5.16 and they recognize, coinciding with the decisional SAs, the office of the Matanzas city conservator as that organization.
- When asked if the organization influences decision-making on the TCIH, 85.71% of the decision-making SAs say yes, with a mean of 1.14 and a standard deviation of 3.78. Regarding the key SAs, 40% of the managers feel that they are included in the decision making process on the heritage by the local authorities and 60% do not feel included, for a mean of 1.60 and a standard deviation of 5.16.
- Regarding the importance of the criteria for the development of local tourism based on the TCIH, the decision-maker SAs point out the importance for the market, original features,

accessibility and availability of the cultural resource as the decisive ones with more than 70% in all cases. The key SAs coincide in the importance for the market, original features and availability of the cultural resource as the most important, this time with more than 60%.

Task 3. Establish the level of participation of the SAs in the territory.

With this information, it was possible to establish the level of participation of the decision-makers and key SAs of the TCIH in the city of Matanzas, it follows that the institutions: Provincial Directorate of Heritage, Provincial Government, Physical Planning, Office of the City Historian, Office of the City Conservator and the Provincial Registry of Cultural Property are direct actors in the conservation and management of the city's TCIH, their relationship is very close in the management of cultural heritage.

Stage III: Identification of the city's tangible immovable cultural heritage

The implementation of this stage in all its steps began with the authorization of the Provincial Directorate of Heritage for the use of the inventory cards for real estate, respecting the methodologies and laws in force. The execution of this stage was possible thanks to the active and determined participation of the managers and owners of the TCIH and cultural organizations in the city of Matanzas.

Step 1. Inventory of the city's TCIH

The inventory is a quantitative tool that allows evidencing the amount of cultural resources available in the city of Matanzas. As a result of this research, 121 real estate properties were registered.

The inventory was carried out in the 28 km² that covers the city of Matanzas. The results of the inventory are presented classified by areas (categories) of the TCP: Domestic: 39, Civil: 49, Industrial: 9, Religious: 7, Military: 4, Commemorative: 13.

Step 2. Establishment of criteria for decision making in terms of tourism development based on the identification of the TCP in the locality

For the intrinsic valuation of the TCIH, the following criteria were defined according to the tourist development of the locality: importance for the market referring to the historical value, social value

and cultural value; original features; accessibility; economic and social feasibility: availability of the cultural resource. With the systematized and updated information of the inventory of the TCIH of the city of Matanzas, it is passed to the evaluation of the real estate.

Step 3. Analysis of the real estate according to the criteria for decision making in terms of tourism development based on the existing TCIH in the locality

To accomplish this step, an intrinsic valuation of the city's real estate is carried out, using a scale of (3) high, (2) medium and (1) low, to value the real estate with respect to each established criterion.

As a result of the evaluation of the 121 properties inventoried in step 1, the following aspects can be established:

- There are 35 properties representing 28% of the total analyzed that meet 93% of the established criteria and are in optimal conditions for the creation of value in the city.
- Another 21 real estate assets represent 21% of the total analyzed and meet the criteria in a range of 66% to 86%, mainly defined by the low importance for the market. Actions may be considered by the GETCIH to plan actions to raise the deficient parameters.
- The rest of the properties total 60 and represent 49% of the total analyzed, but meet less than 60% of the established criteria, with greater incidence in the importance for the market, which makes it impossible to enhance their value in the short term, the GETCIH must define short and long term actions to manage these properties.

Once the assets in optimal conditions for the creation of value in the city have been identified, an inventory card must be prepared for each property; in this card, each of the criteria will be developed more explicitly and other aspects of importance for their enhancement will be analyzed; as an example, the inventory card for the Matanzas Customs House is prepared (Fig. 2).

The preparation of this sheet is covered by the methodological guidelines for the inventory system of monuments of the Ministry of Culture shown below:

1. Description of the model:
 - 1.1. Location
 - 1.2. Name: (Original name, Current name)

- 1.3. Time of construction
- 1.4. Degree of integrity
- 1.5. Typology: (original use)
- 1.6. Remarks
- 1.7. Control
2. Specifications:
 - 2.1. In all cases, no data may be omitted if it is not possible to determine it or it does not have it, such circumstance must be expressed, but never leave the information unrecorded
 - 2.2. The Registration No. shall be made in accordance with the instructions established by the Directorate of Cultural Heritage for this purpose
 - 2.3. A copy of the form for each property inventoried must be sent to the Directorate of Cultural Heritage to the archives of the Cultural Heritage section of the Province and to the Municipality to which the inventoried property belongs



INVENTARIO BÁSICO
No. Inv.: 001

LOCALIZACIÓN
Provincia: Matanzas
Municipio: Matanzas
Consejo Popular: Matanzas este Barrio: Matanzas

DIRECCIÓN:
Genérica: Magdalena e/ Medio y Milanés
Numérica: s/n

Edificación Declarada: Sí x No __ Área Declarada: Sí x No __
Clasifique la Categoría de Declaratoria: Monumento Nacional

DENOMINACIÓN
Original: Aduana de Matanzas
Actual: Oficina del Conservador de la ciudad de Matanzas

ÉPOCA DE CONSTRUCCIÓN
Por documentación: S. XIX 1ra mitad __ 2da mitad x S. XX 1ra mitad __ 2da mitad __ S. XXI __

GRADO DE INTEGRIDAD
Transformada __ Poco transformada: x No transformada __

ESTADO CONSTRUCTIVO
Bien: x Regular __ Mal __

GRADOS DE PROTECCIÓN
Actual I: x II __ III __ IV __

TIPOLOGÍAS
Doméstica __ Civil: x Religiosa __ Industrial __ Militar __ Conmemorativa __

OBSERVACIONES
Obra realizada por los arquitectos Esteban Best y Julio Sagebien. Impresionante edificio de dos plantas con frontón al centro y soportal en arcos de medio punto. El proyecto fue autorizado por el ingeniero Pedro Abad Villarreal, quien lo consideró arreglado al arte en su distribución.

Confeccionado por:
Centro Rector: Oficina Provincial de Patrimonio Fecha: 12/04/2019

Foto referencial

Fig. 2 - Inventory card for the Matanzas Customs Office

Source: Own elaboration

The design of the procedure for the identification of the TCIH allows the interrelation of all the factors involved in the development of local tourism, which starts from certain premises related to the understanding of the main criteria involved in the valuation of heritage products, which guarantees a starting point and the essential attributes that should characterize it.

Its practical application in the city of Matanzas demonstrates its practical value and the existence of the city's heritage potential, and shows the lack of articulation among the social stakeholders, the insufficiencies in the inventory and evaluation of this type of heritage, and therefore its little use for the development of tourism.

The application of the proposed procedure affirms that the identification of the TCIH for tourism development in the locality is possible to incorporate it effectively, thus fulfilling the general objective of the research.

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All authors reviewed the writing of the manuscript and approve the version finally submitted.



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