

Social and Economic Benefits of Cultural Heritage Tourism in the City of Shumen

Zhelyu Vladimirov

Sofia University 'St Kliment Ohridski'

Abstract: The goal of this study is to reveal the social and economic benefits of the heritage tourism in the city of Shumen in 2021. The focus is on the perceptions of Bulgarian tourists as there were almost no foreign visitors due to the pandemic situation. The research is based on data through a standardized questionnaire from 508 visitors to five significant heritage sites (Madara Rider, Shumen Fortress, 'Founders of the Bulgarian State'; Tombul Mosque; and Regional History Museum). The study seeks to answer the following research questions: (1) What are the motives for visiting, impressions, evaluations and recommendations of visitors to these sites? (2) What are the economic benefits for the heritage sites and the city? The results show that domestic heritage tourists benefit mainly from a good combination of culture and beautiful nature, while the heritage sites could not sustain only from their own revenue and need additional support.

Keywords: Shumen, heritage sites, domestic tourists, motives, benefits

Ключови думи: Шумен, обекти на КН, български туристи, мотиви, ползи



DSc Zhelyu Vladimirov is a full Professor at the Faculty of Economics and Business Administration at Sofia University 'St. Kliment Ohridski'. He teaches courses on HRM, Organizational change and Research methods. His main interests are in the field of small business competitiveness, entrepreneurship and the integration of cultural heritage in socio-economic development.

E-mail: jeve@feb.uni-sofia.bg

1. INTRODUCTION

Cultural tourism accounts for a growth in recent decades, which favours the economic development of the respective destinations¹. According to the UNWTO (2018), cultural tourism is a top priority in the tourism policy of 90 % of countries. Data before the Covid-19 pandemic shows that around 40 % of all international tourism trips are culturally motivated². These trips form a special subsector of tourism called *urban heritage tourism*³.

Cultural heritage (CH) makes the territory in which it is located more attractive to visitors, thus becoming an important factor for local development⁴. This is reflected in the contribution of tourists visiting heritage sites to the local economy and community development⁵. If the

¹Ritchie, Hudson 2009.

²UNWTO 2018.

³Ashworth, Tunbridge 2000: 54.

⁴Cristofle 2012.

⁵Di Pietro, Mugion, Renzi 2014.

economic significance of CH refers to the higher attractiveness of the place for tourists and increasing local income, its social significance manifests through strengthening the identity of local communities.

The main objective of this research is to reveal the social and economic benefits of the cultural heritage tourism in the city of Shumen. The focus is on the perceptions and evaluations of Bulgarian tourists visiting heritage sites in the city, as in 2021 there were almost no foreign visitors due to the pandemic situation.

Since the city includes numerous historical reserves, museums, memorial houses, churches and other historical and natural attractions, the visitors to five significant historical heritage sites are interviewed. These sites are the Madara Rider (WHS), the Shumen Fortress and the "Founders of the Bulgarian State" complex (two sites of national importance); the famous Tombul Mosque; and the Regional History Museum (RHM). The research seeks to answer the following research questions:

1. What are motives for visits, impressions, evaluations and recommendations of visitors to these sites?
2. What are the economic benefits for the heritage sites and the city itself?
3. How can the opinions of visitors may contribute to the improvement of the CH sites management to make these sites a more attractive cultural destination?

The research is based on data from 508 visitors to these sites using a standardized questionnaire. The field survey was conducted by interviewers of the Noema agency in the period August–November 2021. The interviews were conducted face-to-face, with the help of a tablet, lasting 15 – 20 minutes. When tourists are with family, friends or another group, one representative is interviewed.

The number of respondents is as follows: 105 visitors to Madara; 108 to the 'Founders of the Bulgarian State' complex; 100 to the Shumen Fortress; 101 to the Regional History Museum; and to Tombul Mosque. Given the official average annual number of visitors to these sites,

from 4,300 for Tombul Mosque to 68,100 for Madara before the pandemic, and from 3,000 for Tombul Mosque and 44,602 for Madara during the pandemic (2021) respectively, the samples of interviewed visitors cannot be considered as representative. Nevertheless, the obtained results would be useful for the strategic planning of cultural tourism in this destination.

Before constructing the questionnaire, in-depth interviews were conducted with employees of the sites and the municipal tourism office regarding the number and characteristics of tourists in the city of Shumen. These interviews helped to better adapt the questionnaire. Besides demographic characteristics, the questionnaire contains 20 closed-ended questions and two open-ended questions. These questions refer to visitors' perceptions and evaluations of visited and planned to visit heritage sites; their impressions; recommendations; sources of information; mode of travel and number of visitors; reasons for visiting; expenses by items; desire to revisit and recommendations to relatives and friends to visit these sites.

2. SOCIO-DEMOGRAPHIC PROFILE OF BULGARIAN HERITAGE TOURISTS IN THE CITY OF SHUMEN

The socio-demographic characteristics of the heritage tourists are investigated in terms of gender, age, education, professional status, income, mode of travel, companions and place of residence. In this study, 37 % of respondents are male and 63 % female, which is consistent with the results of other studies⁶. Similar to other data⁷, tourists aged 26 – (50 %) predominate, followed by those aged 46 – 65 (33 %). The smallest is the group of visitors up to 24 years (9 %), as well as those aged 65 and over (9 %). On average, 70% of respondents are employed full-time; 15 % are pensioners; 5 % are hourly and 2 % are temporarily employed; students are 3 %; and the unemployed – 3 %. These data are in line with findings that over

⁶ Remoaldo et al. 2014b.

⁷ Antyn et al. 2017.

50 % of visitors to CH sites are full-time or self-employed⁸. Similar to other studies⁹ these heritage tourists are mostly with a university (54 %) and secondary education (43 %) and with a middle (29 %) and middle-high income level (27 %).

From 75 % to 82 % of the respondents visited the sites mainly with a car, and from 12 % to 18 % were with organized tourist transport. The role of other transport like train and bus is very small. The widespread use of individual motor vehicles (57 %) to cultural sites in Bulgaria is shown also by other researchers¹⁰.

Most of the visitors were with families (51 %) of two to six members; 34 % were with a group of friends between two and twelve people; 11 % – in organized tourist groups of up to 25 people and 9 % – alone. The interviewed employees from these sites and other house-museums in the city confirm that in recent years there has been an increase in visitors with families at the expense of organized tourists¹¹. By place of residence, on average, 70 % of visitors are from larger district cities, 15 % – from small towns, 10 % – from Sofia-city and 5 % – from villages.

3. MOTIVES FOR VISITS, IMPRESSIONS, EVALUATIONS AND TOURISTS' RECOMMENDATIONS

On average, 75 % of visitors received information about these sites from relatives and friends, followed by those who used social networks (29 %), television and newspapers (18 %), books (15 %), tour agencies (13 %), and other

sources. The low share of booking sites, hotels and guesthouses as sources of such information is striking. These data show that word of mouth information is a key for the decisions of the surveyed tourists to make visits¹².

The main reasons for visiting these heritage sites in the city of Shumen are that respondents like to visit cultural sites (average 73 %); know that there is a World Heritage Site (46 %); want to learn something new about Bulgarian history (44 %); the sites offer a good combination of culture and beautiful nature (44 %); there are multiple cultural sites in one place (42 %); the sites are interesting and beautiful places for the whole family (37 %). For about 21 % of them, the reason is that the sites represent a close, convenient and naturally beautiful location; another 23 % follow positive feedback from relatives and acquaintances; for 20 % the sites are part of the tourist route; and 16 % were in the area by chance and wanted to diversify their stay.

Another factor that influences the decisions of tourists is the previous visit. In this study, the largest share is for first-time visitors to the respective site – from 57 % for “Founders of the Bulgarian State” complex to 80 % for RHM and Tombul Mosque, followed by second-time visitors (on average 19 %) and more than twice (10 % on average) at these sites.

The impressions that tourists would share with a friend who has not been with them are different for different sites¹³. The **Fig. 1** presents key words used for a similar narrative by visitors to Madara and the ‘Creators of the Bulgarian State’ complex.

⁸ Adie, Hall 2017.

⁹ Ramires et al. 2018.

¹⁰ Marinov et al. 2020.

¹¹ Interview with an employee from Madara.

¹² Lypcz-Guzmán et al. 2018.

¹³ Remoaldo et al. 2014a.

Madara Rider

Base – 108 comments

Complex "Creators of the Bulgarian State"

Base – 105 comments

(Authors elaboration through Word Cloud Generator)



Figure 1. Key words reflecting what visitors would tell a friend who was not with them about their visit to the Madara Rider and the complex ‘Creators of the Bulgarian State’

Фигура 1. Ключови думи, отразяващи какво посетителите биха казали на приятел, който не е бил с тях, относно тяхното посещение на „Мадарския конник“ и комплекса „Създатели на българската държава“

Over 90 % of the respondents claim that they learned new and unknown things or that they reinforced previous knowledge about history. These data are similar to those obtained by other research¹⁴, where 91 % of respondents stated that the visit increased their knowledge of the heritage.

On average, 74 % of surveyed visitors believe that the protection of CH sites is primarily the responsibility of the state, and 73 % claim that it is the responsibility of the municipalities. This share decreases to about 50 % regarding the responsibility of citizens and businesses, but it is 62% in respect to the associations of all actors (state, municipalities, citizens and business).

To the question of what is missing/what would you recommend to develop these sites as an even more attractive destination, answers are such as: 'Everything is good. Everything is fine. Everything is OK. I don't think anything is missing. There is nothing missing...' etc.

However, in respect to the Madara Rider some visitors share that more online and offline advertising and information is needed, leaflets in foreign languages, as well as more signs at the detours along the eco-path to the plateau. For the 'Creators of the Bulgarian State' complex the

recommendations are to have more advertising, information in foreign languages, but also a corner for children, restaurants and a lift. The few recommendations for Shumen Fortress refer to 'having places to rest, because it is very large to tour, especially in summer; to have classes for children; dining area; more information on media; more signs; more benches and gazebos'. Some of the specific recommendations for RHM are that 'the storage fund needs ventilation' and also 'to improve the facade of the museum'. Among the few recommendations for Tombul Mosque are: 'there should be more advertising; traditional delicacies such as Turkish delight and baklava should be offered in front of the entrance; explanations from a tour guide; better maintenance; advertising and promotional materials; transport instructions'.

A clear differentiation is observed in terms of full agreement with the statements regarding the significance of the sites and the visitors' personal engagement with CH (**Tab. 1**). Visitors to the Madara Rider have the highest proportions of fully agreeing with all statements (except the first) and especially with the last two, which refer to personal commitments to participate in preservation activities or to donate funds to CH sites.

¹⁴ *Kempiak et al.* 2017.

The share of those who fully agree with the statements decreases among visitors to the complex “Creators of the Bulgarian State” and subsequent sites, especially in relation to the statements regarding the good organization

of the visits and personal involvement in preservation and donating activities. This is understandable, as the significance of CH sites is related to political, religious and other values that are different for different visitors.

Table 1. Full agreement with the following statements
Таблица 1. Абсолютно съгласие със следните твърдения:

CH sites in the city of Shumen/ Statements	Madara Rider	Complex ‘Creators of the Bulgarian State’	Shumen Fortress	Regional historical museum	Tombul Mosque
1. Contribute to the education of adolescents	78%	79%	56%	65%	36%
2. The sites provide key information about the lives of previous generations	78%	77%	60%	55%	42%
3. The sites allow a pleasant combination of cultural and historical knowledge, pure nature and an attraction for children	78%	71%	52%	34%	33%
4. The sites are well organized by the city - there is good transport, comfortable hotels and guesthouses	62%	55%	47%	43%	39%
5. I like to participate in cultural and historical heritage events	72%	58%	50%	43%	18%
6. When I have time, I participate (would participate) in the activities of various organizations for the preservation of cultural and historical heritage	60%	47%	37%	34%	15%
7. I would engage in a campaign to donate funds for the preservation of cultural and historical heritage sites	65%	49%	29%	38%	16%

The majority of tourists at each of the five sites also visited the other four. For example, from 60 % to 82 % of the visitors to the “Founders of the Bulgarian State” complex, Shumen Fortress, the RHM Tombul Mosque were also on Madara. From 51 % to 81 % of the visitors to the other four sites also visited the ‘Creators of the Bulgarian State’ complex; from 42 % to 77 % of the visitors to the other four sites were at the Shumen fortress, etc. This share decreases regarding visits to RHM, Tombul Mosque and other churches.

The interviewees answer also to the question about other planned visits. From 60 % to over 80 % of them at each of the sites such as Madara, ‘Creators of the Bulgarian State’ and Shumen Fortress plan to visit other two sites as well. The same proportion of respondents plan a visit to Pliska and from 60 % to over 70 % plan a visit to Veliki Preslav (both sites are not included in the present study). RHM is in the plans of an average of 55% of visitors to

the other four sites; Tombul Mosque – of 34 % of these visitors; the church Three Saints – of 37 %; the Church of the Holy Ascension – of 31 %; The Armenian Church – of 27 %, etc.

This is a reason to recommend the creation of a complex ticket for all these sites, even though the complex ‘Creators of the Bulgarian State’, Tombul Mosque and churches are not under the hat of the RHM, which manages other sites and house-museums in the city.

4. ECONOMIC BENEFITS FROM VISITORS TO THE CH SITES IN THE CITY OF SHUMEN

The estimate of the total number of visitors according to the data of the interviewees during their visit to the respective sites is from 468 people for the Madara Rider to 655 people for the ‘Creators of the Bulgarian State’ complex (Tab. 2). The estimate of the total expenditure

of these visitors is from BGN 12,748 for the Madara Rider to BGN 17,485 for the RHM, and the estimate of the average expenditure per visitor is in the range of BGN 24 for the 'Creators of the Bulgarian State' complex to BGN 31 for RHM.

The largest share of these costs is for transport (average 37 %), followed by expenses for lunch/dinner (average 22%), accommodation (average 15 %), food and drink (average 15 %), tickets/taxi entrance (average 8 %), additional attractions (average 39 %) and other (0.06 %).

Table 2. Expenditures of visitors by items
Таблица 2. Видове разходи на посетителите

	Madara Rider	Complex 'Creators of the Bulgarian State'	Shumen Fortress	Regional historical museum	Tombul Mosque
1. For transport	44%	36%	34%	38%	35%
2. Lunch/dinner	20%	22%	23%	21%	22%
3. Food/drinks from shops	14%	16%	16%	15%	13%
4. Accommodations	9%	12%	16%	18%	21%
5. Tickets/entrance fees	8.9%	10.8%	7.7%	6.4%	5.3%
6. Additional attractions	3.4%	2.7%	3%	2.1%	3.5%
7. Others (souvenirs and others)	0.2%	0.1%	0%	0%	0%
8. Total expenses (in BGN)	12 748	15 943	16 685	17 485	17 112
9. Total number of visitors during the visit of the interviewees	468	655	590	566	619
10. Average expenditure per visitor in BGN	27	24	28	31	28
11. Direct income to the site from 1 visitor in BGN (according to item 5 and item 10)	8.9% = 2.40	10.8% = 2.59	7.7% = 2.16.	6.4% = 2	5.3% = 1.5

During the period of the survey, the regular ticket for one adult visitor to the Madara Rider was BGN 5, and the discount for schoolchildren and students was BGN 2. There were also family tickets for adults with children between BGN 7 and BGN 9, as well as an additional payment for talks in Bulgarian and in a foreign language (10 BGN and 15 BGN, respectively). The regular ticket for one adult visitor to the complex 'Creators of the Bulgarian State' and the Shumen Fortress was BGN 4, and the discount for schoolchildren and students was also BGN 1.50-2. There were also family tickets for adults with children between BGN 6 and BGN 7, as well as additional payment for talks in Bulgarian (BGN 10) and in a foreign language (BGN 15). The use of family tickets, since on average half of the visitors were with families, can also explain the lower revenue per visitor at an average of half the value of the single ticket.

For three of the sites, there is official data from RHM on the average annual number of visitors in the last 3 – 4 years before and during the pandemic (2020), as well as on the size of the average annual subsidy plus revenue from

tickets and events. This makes it possible to estimate the average annual expenditure of visitors based on average expenditure per 1 visitor, direct revenue for the respective sites and revenue per 1 visitor, as well as the proportion of these revenues from the subsidy.

Only for the complex 'Creators of the Bulgarian State' there are accurate data on revenue from entrance fees, tickets, rituals and other activities before and after the pandemic, which allows comparing these data with the estimated results of visitors to this site. For example, the average revenue from 1 tourist to this site according to official data is BGN 2.59, which value is identical to the one obtained from the visitors' survey – BGN 2.59. In addition, the calculated direct revenues for the site before and after the pandemic as 10.8% of the total revenue (with the average cost per user of BGN 24 obtained from the survey) are very close to the real revenues – respectively BGN 73,354 and BGN 73,256 before the pandemic; BGN 51,401 and BGN 51,348 during the pandemic (2020) (Tab. 3). This is a reason to assume that the respondents at the other sites gave also correct answers for their expenses.

Table 3. Comparative analysis of the official data and the data obtained from the survey on costs and revenues of the analysed CH sites (in BGN)

Таблица 3. Сравнителен анализ на официалните данни и информацията, получена чрез анкета относно разходите и посещенията на анализирани културноисторически обекти в лева

		Madara Rider	Complex 'Creators of the Bulgarian State'	Shumen Fortress	Regional historical museum	Tombul Mosque
Official data before the pandemic	Average annual subsidy plus revenues from tickets and events	316 376	Само директни приходи = 73 256	105 380	Няма данни	Няма данни
	Average annual number of visitors	68 100	28 300	16 683	10 000 (оценка)	4300
	Average revenue from 1 user		2.59			
Estimated data before the pandemic	Average annual expenditure of visitors	68 100 x 27 = 1 838 700	28 300 x 24 = 679 200	16 683 x 28 = 467 124	10 000 x 31 = 310 000	4300 x 28 = 120 400
	Direct revenues for the site	8.9% = 163 644	10.8% = 73 354	7.7% = 35 968	(6.4%) = 19 840	5.3% = 6 381
	Share of direct revenue from the subsidy	51.72%	≈ 100%	34%	?	?
Official data during the pandemic (2020)	Average annual subsidy plus revenues from tickets and events	316 376	Only direct revenues = 51 401	105 380	No data	No data
	Average annual number of visitors	44 602	19 810	12 141	3 200	3000
Estimated data during the pandemic (2020)	Average annual expenditure of visitors.	44 602 x 27 = 1 204 254	19 810 x 24 = 475 440	12 141 x 28 = 339 948	3 200 x 31 = 99 200	3000 x 28 = 84 000
	Direct revenues for the site	8.9% = 107 179	10.8% = 51 348	7.7% = 26 176	6.4% = 6 350	5.3% = 4 452
	Share of direct revenue from the subsidy	33.88%	≈ 100%	25%	?	?

According to the data from Table 3, the estimated direct revenues of Madara and Shumen Fortress represent 52% and 34% of the total subsidy plus ticket and event revenue before the pandemic and 34% and 25% respectively during the pandemic. This shows that these sites could not be self-supporting from their own income. Only in the complex 'Creators of the Bulgarian State' there is almost complete coverage between official and estimated direct revenues before and during the pandemic.

Of the visitors to the Madara Rider, 24 people spent the night in the city, spending a total of BGN 1,195, or an average of BGN 49.8 per 1 visitor. According to the official data, the average income for accommodation per one tourist in the Shumen municipality for the period 2014 – 2017 is between BGN 49.4 and 53.5¹⁵, a value very close to the one calculated

from the survey data. The calculated data for the costs of overnight stays per 1 visitor at the other sites are higher: BGN 81.30 for the 'Creators of the Bulgarian State' complex; BGN 83.59 for Shumen Fortress; BGN 106.93 for RHM; and BGN 115.94 for Tombul Mosque. This can be explained by the higher number of overnight stays, which according to official data for the specified period is between 1.5 and 1.7. These data provide additional grounds for assuming that the respondents were correct for their expenses during the visits to these sites.

It should be considered that the information on the number of visitors to the 'Creators of the Bulgarian State' complex and the Madara Rider is based on paid entrance fees, but *not all citizens of Shumen pay fees, and most visitors to the Madara Rider do not pay an entrance fee, due to unlimited access.*

¹⁵ Program for the development of tourism in the Shumen municipality 2018 – 2021.

5. 'WILLINGNESS TO PAY' AND 'WILLINGNESS TO DONATE' FOR CH SITES

On average, 46 % of all visitors consider that the reasonable amount for paying tickets/ entrance fee at these CH sites is up to BGN 5 (close to the value of real tickets); 26 %

estimate this amount to BGN 10; another 14 % – up to BGN 20, or an average of 86 % of the interviewees estimate this amount from BGN 5 to BGN 20. Only the visitors to the Madara Rider and the complex 'Creators of the Bulgarian State' have a slightly higher share among those who indicate an amount of over 40 BGN (**Tab. 4**).

Table 4. Depending on your possibilities, what is the amount that seems reasonable to you to pay for a visit to:

Таблица 4. Според Вашите възможности каква е сумата, която изглежда логична за плащане, когато посещавате:

In BGN	Madara Rider	Complex 'Creators of the Bulgarian State'	Shumen Fortress	Regional historical museum	Tombul Mosque	Average
Up to 5	54%	32%	49%	45%	51%	46%
Up to 10	18%	28%	17%	35%	34%	26%
Up to 20	12%	18%	18%	7%	13%	14%
Up to 25	1%	5%	7%	4%	0%	3%
Up to 30	0%	5%	3%	8%	1%	3%
Up to 35	1%	1%	1%	0%	0%	1%
Up to 40	3%	4%	2%	0%	0%	2%
Above 40	11%	8%	3%	2%	1%	5%

Not all respondents answered the question about the amount they are willing to donate once for the preservation of the respective sites they visited. As can be seen

from **Tab. 5**, even some of the respondents indicated a possible donation of BGN 0 – from 4 % for the Madara Rider to 32 % for the Tombul Mosque.

Table 5. Depending on your possibilities, what amount in BGN are you willing to donate once for the preservation of the following sites?

Таблица 5. Според Вашите възможности коя е сумата в лева, която бихте желали да дарите за опазване на следните обекти:

Possible one-time donation amount	Madara Rider	Complex 'Creators of the Bulgarian State'	Shumen Fortress	Regional historical museum	Tombul Mosque
0	4%	13%	15%	13%	32%
5	15%	14%	27%	16%	24%
10	30%	28%	22%	38%	19%
20	33%	26%	16%	17%	14%
25	3%	1%	1%	2%	1%
30	3%	9%	10%	6%	4%
50	1%	3%	5%	8%	3%
100	1%	2%	-	1%	-
Above 100	1%	0%	2%	0%	-
Average one-time donation per 1 visitor	1350 : 421 = 3.21	1575 : 537 = 2.93	1530 : 490 = 3.12	1515 : 481 = 3.15	880 : 415 = 2.12
Possible average annual amount of donations before the pandemic	61 290 x 3.21 = 196 741	23 206 x 2.93 = 67 994	13 847 x 3.12 = 43 203	8 500 x 3.15 = 26 775	2 881 x 2.12 = 6 108
Total direct revenue and any donations relative to the grant	163 644 + 196 741 = 360 385 > 316 376	73 354 + 67 994 = 141 348 > 73 256	35 968 + 43 203 = 79 171 < 105 380	19 840 + 26 775 = 46 615 ?	6 381 + 6 108 = 12 489 ?
Possible average annual amount of donations during the pandemic	40 142 x 3.21 = 128 856	16 244 x 2.93 = 47 595	10 077 x 3.12 = 31 440	3 200 x 3.15 = 10 080	2010 x 2.12 = 4 261
Total direct revenue and any donations relative to the grant	107 179 + 128 856 = 236 035 < 316 376	51 348 + 47 595 = 98 943 > 51 401	26 176 + 31 440 = 57 616 < 105 380	6 350 + 10 080 = 16 430 ?	4452 + 4261 = 8 713 ?

The highest share of respondents indicates BGN 10 as such amount (on average 27 % for all sites), followed by those who state an amount of BGN 20 (on average 21 %) and BGN 5 (on average 19 %). The remaining sums have a low percentage of the respondents, with only the sum of BGN 30 indicated by 6 % on average, and the sum of BGN 50 – by 4 %. A total of 2/3 of the respondents (68 %) have their possible one-time donations between BGN 5 and BGN 20.

Following the distribution of respondents according to the indicated sums for a one-time donation and the total number of visitors to the respective sites, the total amount of a possible one-time donation and the average amount of a donation per visitor are calculated. These amounts vary from BGN 2.12 for Tombul Mosque to BGN 3.21 for Madara Rider per 1 visitor.

From the official number of average annual visitors, the share and number of those who would donate some amount are calculated (respectively 90 % for the Madara Rider; 82 % for the 'Creators of the Bulgarian State' complex; 83 % for the Shumen Fortress; 85 % for the RHM; and 67 % for the Tombul Mosque). This number, multiplied by the average donation amount per 1 visitor for the respective site, gives the potential annual average amount of a one-time donation for each of these sites. These amounts range from BGN 6,108 for Tombul Mosque to BGN 196,741 for the Madara complex before the pandemic, and from BGN 4,261 and BGN 128,856 respectively for the same sites during the pandemic (2020).

If the sums of the calculated direct revenue and the possible average annual donations are added together, it turns out that two of the sites

(the Madara and the 'Creators of the Bulgarian State' complex) would have funds higher than their annual subsidies before the pandemic, while Shumen Fortress would collect an amount less than its annual subsidy.

However, for the period of the pandemic in 2020, only the 'Creators of the Bulgarian State' complex would have an amount of revenue and donations greater than the means for its maintenance. This may also be related to the fact that this monument was celebrating the 40th anniversary of its creation. The other two sites, even with a possible donation, would not be able to cover their annual subsidies.

6. INTENTIONS TO REVISIT CIN SITES IN THE CITY OF SHUMEN AND RECOMMENDATIONS TO OTHERS TO VISIT THEM

Tourists' emotions and satisfaction with the visited CH sites are an important factor in their intentions to revisit and recommend the destination¹⁶. In this research, between 80 % and 96 % of the tourists express a desire to revisit the relevant sites in the city of Shumen, and from 84 % to 98 % would recommend their relatives and acquaintances to visit these places.

The highest share of them would make such a recommendation for the Madara Rider, the 'Creators of the Bulgarian State' complex and the Shumen Fortress due to the fact that these sites allow a pleasant combination of a walk in nature with cultural and historical knowledge (respectively 89 %, 78 % and 62 %), while this is not a leading recommendation for RHM and Tombul Mosque (Tab. 6).

Table 6. Please, indicate some of the most important reasons you would recommend to acquaintances to visit the following sites:

Таблица 6. Моля, посочете някои от най-важните причини, поради които бихте препоръчали на близки да посетят следните обекти:

Reasons	Madara Rider	Complex 'Creators of the Bulgarian State'	Shumen Fortress	Regional historical museum	Tombul Mosque
A combination of nature and historical knowledge	89%	78%	62%	40%	31%
Loads with knowledge	78%	77%	62%	70%	54%
Close to Shumen city/location is convenient to be visiting	42%	50%	49%	29%	40%
There are other interesting cultural sites and places in Shumen	52%	55%	57%	48%	62%

¹⁶ Halpenny et al. 2018.

In second place among these reasons for all sites is that the places provide knowledge about the history and culture of Bulgaria and the region (68 % on average). More than half of the respondents (55 % on average) would also indicate that there are other interesting cultural sites to visit in the city of Shumen. A very small number of respondents (from 1 to 3 visitors) would not make such recommendations only for RHM and Tombul Mosque.

6. CONCLUSIONS

According to the data, from 60 % to 80 % of heritage tourists in the city of Shumen are from a large district cities; female visitors prevail over male visitors on average about one and a half times; with a higher share of people aged 26 – 35 years and 36 – 45 years, and pensioners in second place; mainly full-time employed (70 %); with a middle monthly gross income per person of the household. The low share of pupils and students (on average 4 %) may be due to the pandemic situation, when group visits specific to students are not organized.

Information from relatives and friends (*word of mouth*) proved to be the leading factor in the decisions of the surveyed tourists to visit these CH sites. This requires creating a unique experience of visiting these sites so that information can spread and the flow of visitors does not decrease.

The main reasons for visiting the heritage sites in the city of Shumen are that the respondents like to visit cultural sites, want to learn something new about Bulgarian history, but also that these places offer a good *combination of culture and beautiful nature* – a result that was also received from the visitors of the Tzari Mali Grad complex.

The recommendations for improving these sites include mainly more advertising, the creation of recreation areas, a children's corner, places to eat and improving access in the sense of regular public transport or

a lift, which would also be an additional attraction.

More than half of the tourists to Madara, the complex 'Creators of the Bulgarian State' and the Shumen Fortress express their agreement with the importance of these sites for the education of adolescents. Also, from 50 % to 72 % of them share that they like to participate in events dedicated to historical heritage. At the same time, the share of those who participate (or would participate) in the activities of various CH organizations, and especially the share of those who would engage in a campaign to donate funds for CH preservation, is much lower. Not surprisingly, the majority of respondents believe that the state (74 %) or the municipalities (73 %) should be the main responsible for the protection of CH sites.

Estimated direct revenues for the investigated sites range from over 1/3 to over 50 % of the total subsidy plus ticket and event revenue before the pandemic, while during the pandemic these shares drop significantly. This shows that the sites could not support themselves only from their own revenue. On average, half of the visitors consider relatively low price for tickets and entrance fees to be reasonable. Other research has also reported that CH sites are most often perceived as being available for free or at very low cost¹⁷.

As for the 'willingness to donate', on average 2/3 of the respondents have their possible one-time donations in the range of 5 BGN to 20 BGN. For only two of the sites, the sums of the calculated direct revenue and possible donations would be higher than their annual revenue before the pandemic. However, it should be kept in mind that donations can be repeated every year mainly for new and not for all visitors.

These results once again testify that regardless of the efforts for more effective management and entrepreneurial initiatives, the sites of CH must be financially supported by the state and municipalities

¹⁷ Ashworth 2008.

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Социални и икономически ползи от туризма на културното наследство в град Шумен

Желю Владимир

Целта на това изследване е да се разкрият социалните и икономическите ползи от развитието на туризма на културното наследство в град Шумен през 2021 г. Фокусът е върху възприятията и оценките на български туристи, тъй като поради пандемичната ситуация почти няма чуждестранни посетители. Изследването се основава на данни посредством стандартизиран въпросник от 508 посетители на пет значими обекта на културното наследство (Мадара, Шуменска крепост, „Създатели на българската държава“; Томбул джамия; Регионалният исторически музей). В проучването се търси отговор на следните изследователски въпроси: (1) Какви са мотивите за посещение, впечатленията, оценките и препоръките на посетителите на тези обекти? (2) Какви са икономическите ползи за обектите на културното наследство и града? Резултатите показват, че родните туристи се възползват главно от добрата комбинация от история и красива природа на тези места, докато обектите на културното наследство не могат да се издържат само от собствените си приходи и се нуждаят от допълнителна подкрепа.

