

# Assessment of Cultural Heritage in the Town of Shumen by the Locals and Intentions to Contribute to its Development

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**Abstract:** The study aims to reveal the assessment of some sites of cultural heritage in the town of Shumen by locals, the perceived contribution of these sites to the city development, and the intentions of citizens to contribute to their preservation. It is based on the Place standard methodology. The data are obtained through a standardized questionnaire of 510 residents. The results show that the local people are proud of the cultural heritage sites in their town. They indicate also some weaknesses related to the organization of visits and access to these sites, on the basis of which the relevant recommendations are proposed.

**Key words:** Shumen, citizens, sites of CH, significance, recommendations

**Ключови думи:** Шумен, граждани, обекти на КН, значимост, препоръки



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## INTRODUCTION

More than 70 percent of the World Heritage Sites are located in urban areas or have urban areas within their nominated areas. In this regard, in 2011 UNESCO proposed the use of the *historic urban landscape*<sup>1</sup> approach, which is a particular case of the broader concept of *cultural landscape*<sup>2</sup>. This concept considers heritage as an engine for the socio-economic development of the respective places through the expansion of tourism and other economic activities<sup>3</sup>.

The involvement of *local people*<sup>4</sup> is important for the successful planning and maintenance of cultural heritage (CH) sites. At the same time, there is not much research on the role of local people in heritage development and cultural tourism. Therefore, the main *purpose* of this study is to reveal the assessment of some cultural and historical heritage sites in Shumen by locals, the perceived contribution of these sites to the development of the city, and the intentions of citizens to contribute to their development. The city was chosen because of its rich cultural heritage, including a number

<sup>1</sup> UNESCO 2019.

<sup>2</sup> Taylor 2018.

<sup>3</sup> Silberman 2013.

<sup>4</sup> Zhang et al. 2021

of historical and archaeological reserves, houses-museums, churches, community centres, and natural landmarks.

The survey is based on the *Place standard methodology*<sup>5</sup>, and the data were obtained through a standardized questionnaire of 510 residents of Shumen. The opinion of these citizens was surveyed mainly on five of all CH sites in the city: Madara; Shumen Fortress; the complex 'Creators of the Bulgarian state'; the famous Tombul Mosque and some churches; and the Regional historical museum (RHM).

## 2. LITERATURE REVIEW

Policies for the sustainable development of today's European cities are increasingly considering the issues associated with the adequate protection of natural and cultural heritage<sup>6</sup>, which is at the heart of the *historic urban landscape* approach. Transforming the historic urban landscape into an engine for development requires significant changes in urban infrastructure, restoration of historic buildings and rehabilitation of public spaces<sup>7</sup>. This way the approach integrates the goals of urban heritage protection with those of socio-economic development<sup>8</sup>. Following the Covid-19 pandemic, many municipalities were faced with the question of how to improve their cultural landscape so that they can attract visitors again. In this regard, the involvement of local communities in the planning and maintenance of CH sites is crucial<sup>9</sup>.

Local authorities, hoteliers and cultural institutions are most often involved in the practical management of the CH and related tourism, but community representatives are often lacking<sup>10</sup>. At the same time, the participation of local communities is important both for the development of cities<sup>11</sup> and for the preservation of historic urban landscapes<sup>12</sup>. The studies show that inclusiveness is particularly central to planning in cultural heritage settings, due to the multidisciplinary and contested nature of this field<sup>13</sup>. However, other research reveals that engaging the community is difficult because communities are neither universal nor homogeneous<sup>14</sup>. Effective involvement of local

people in the development of heritage requires not only convincing of the value of heritage, but also real empowerment. This is the reason for the need to measure the perceptions of residents about the use of CH in their settlements.

## 3. RESEARCH METHODOLOGY

The research is based on the *Place standard methodology*, which allows to identifying problems related to the management of the sites themselves and the environment. The opinion of 510 citizens of the town of Shumen in the period August-December 2021 was taken through a standardized questionnaire by interviewers from the NOEMA agency. The questionnaire contains 23 questions and 6 socio-demographic characteristics of the respondents. The current survey is based on the answers to only a small part of these questions.

Among the surveyed citizens predominate persons aged 26-65, with secondary and higher education, full-time employees and pensioners, with average gross income per household member between 401 – 1500 BGN.

## 4. ANALYSIS OF THE RESULTS

### 4.1. Visits to CH sites by citizens in the city of Shumen

The data from the survey show that 10 % of the interviewed citizens have not visited the *Madara Horseman*, 16 % have not visited the *Shumen Fortress*, and 11 % have never been to the *Creators of the Bulgarian State* complex. The share of those who have not been to other sites of local importance is significantly higher (three churches, Tombul Mosque and the Regional History Museum (RHM)). Among those who have visited the first three sites only once, persons with primary and secondary education predominate, while among those who have visited these sites over 5 times greater share have persons with higher education.

Visits to immovable sites with cultural values are more popular when various cultural events are organized there<sup>15</sup>, but the pandemic period severely limited these initiatives.

<sup>5</sup> *Place Standard Guide*.

<sup>6</sup> *Nijkamp and Riganti* 2008: 35.

<sup>7</sup> *O'Hare* 1999.

<sup>8</sup> *Bandarin and Van Oers* 2012.

<sup>9</sup> *Necissa* 2011: 875-876.

<sup>10</sup> *Paskaleva and Besson* 2006: 66.10

<sup>11</sup> *Ostanel* 2017.

<sup>12</sup> *Turner and Singer* 2015.

<sup>13</sup> *Lusiani and Zan* 2013: 111.

<sup>14</sup> *Chirikure et al.* 2010: 39.

<sup>15</sup> *Jureniene and Radzevicius* 2014: 240.



MADARA National historical-archaeological reserve Madara National Historical-Archaeological Reserve encompasses a rich history, a wide range of archaeological artifacts, beautiful nature and the unique rock relief Madara Horseman. As the only one of its kind medieval rock relief in Europe dating from the 8th c., the Madara Horseman was included in the UNESCO World Heritage list

(Source: <https://tourism-shumen.com/en>)



FOUNDERS OF THE BULGARIAN STATE Memorial Complex, constructed to commemorate the 1300th anniversary of the foundation of the Bulgarian State, was opened in 1981.

(Source: <https://tourism-shumen.com/en>)



Shumen Fortress Historical-Archaeological Reserve, also known as the Old City, rises about 3 km west of present day Shumen. After its existence as a Thracian fortified city (5<sup>th</sup> – 2<sup>nd</sup> c. BC), a dominating fortress which guarded main Roman roads (2<sup>nd</sup> – 4<sup>th</sup> c.), a Byzantine fort with control of the approach to the Balkan Mountains (5<sup>th</sup> – 6<sup>th</sup> c.), and a strategic fortification in the early Middle Ages (8<sup>th</sup> – 10<sup>th</sup> c.), in late Middle Ages (12<sup>th</sup> – 14<sup>th</sup> c.) Shumen fortress turns into one of the most important cities in the Second Bulgarian Kingdom.

(Source: <https://tourism-shumen.com/en>)



The Sherif Halil Pasha mosque, also known under the name of Tombul mosque, was built in 1744. It was located in the central part of Shumen. It is the country's largest in size and most significant mosque, as well as the second largest on the Balkan Peninsular following the Sultan Selim mosque in the town of Edrine, Turkey.

(Source: <https://tourism-shumen.com/en>)



Shumen Regional Museum of History keeps a collection of more than 150 000 artifacts (5th millennium BC – 20th c.). It makes it one of the richest museums in Bulgaria (Source: <https://www.facebook.com/regionalenistoricheskimuzej.sumen/>).

#### 4.2. Assessment of the significance of the CH sites in the city of Shumen and recommendations for improving their protection and development

When asked which of the sites of CH in the city of Shumen are most important for the transformation of the city into a famous tourist destination, 73 % said 'Madara Horseman', 62 % – the complex 'Creators of the Bulgarian state' and 58 % – 'Shumen Fortress'. Other sites such

as various museums, churches, mosques and community centres collect a much lower share of respondents.

Based on the answers of the respondents to a number of statements concerning the importance of the CH sites, an average estimation of these statements in points is calculated. It takes values from 0 to 100, the closer to 100 – the higher and vice versa (**Tab. 1**).

**Table 1.** To what extent do you agree with the following statements (on a scale of 1 – 'strongly disagree' to 5 – 'strongly agree') (%)

Statements	1	2	3	4	5	Average rating
1. The sites of CH in the town of Shumen contribute to the education of adolescents		0.6	7.8	23.9	<b>67.6</b>	92
2. These sites provide key information about the life of previous generations and the history of the Bulgarian state		0.4	6.1	20.0	<b>73.5</b>	93
3. Visits to the sites of CH in the city of Shumen allow a pleasant combination of cultural and historical knowledge, pure nature and attraction for children		0.2	10.2	20.0	<b>69.6</b>	92
4. Visits to the Madara Reserve are well organized by the city - there is good transport, and the city has comfortable hotels, guest houses and places with good food	<b>2.0</b>	<b>10.4</b>	30.0	26.7	31.0	75
5. Visits to Shumen Fortress are well organized by the city - there is good transport, and the city has comfortable hotels, guest houses and places with good food	<b>4.9</b>	<b>11.6</b>	28.8	28.6	26.1	72
6. Visits to the Complex 'Creators of the Bulgarian State' are well organized by the city - there is good transport, and the city has comfortable hotels, guest houses and places with good food	<b>3.1</b>	<b>9.6</b>	29.8	30.0	27.5	74
7. The churches in the town of Shumen and the Tombul mosque are well maintained and easily accessible	0.4	1.8	17.3	39.6	41.0	84
8. The Regional Historical Museum in Shumen is easily accessible and offers a rich collection and cultural program	0.4	1.0	29.2	34.1	35.3	81
9. All these sites together or separately offer an unforgettable experience for local, foreign and foreign visitors		1.0	13.7	31.0	<b>54.3</b>	88

On average, 70 % of respondents fully agree with the first three statements. These statements also have the highest average scores (92, 93 and 92, respectively) and testify to the strong attachment of residents to these CH sites.

However, opinions differ on the organization of visits to the three key sites of CH (Madara, Shumen Fortress and the complex 'Creators of the Bulgarian State'). The share of those who disagree with the fact that visits to these sites are well organized

varies from 12 % to 16 %, and about 30 % express a neutral opinion. Accordingly, these statements have lower average scores – from 72 to 75. This is an indication of a certain *discrepancy* between the perceived importance of these three sites of CH for the city and the organization of their visit.

The individual statements of this question are summarized in *six dimensions*, with the estimation

of each dimension representing the average of the statements that make it up. Despite the high marks for CH sites, citizens recommend a number of activities that would increase their contribution. These recommendations are grouped into *eight groups* with corresponding average scores. The comparison of the two types of estimations is given in **Tab. 2**.

**Table 2.** Average estimates of the importance of CH sites and recommendations for improving their development

Statements about the importance of CH sites	Average rating	Citizens' recommendations on improving the development of CIN sites in Shumen	Average rating
Good organization and transport for visits to the Madara Horseman	75	<b>Easier access to CH facilities around the city</b>	<b>94</b>
Good organization and transport for visits to Shumen Fortress	72	More environmental activities (cleanliness, green areas, places to walk)	<b>93</b>
Good organization and transport for visits to the complex 'Creators of the Bulgarian state'	74	Increasing the state and municipal funds for maintenance and promotion of CIN sites	<b>92</b>
Easily accessible and rich in collections RM in the city	81	Closer links with schools, opening of CH educational programs, more cultural events and local holidays	<b>91</b>
Well maintained and easily accessible churches and Tombul Mosque	84	Better online and offline information and marketing	<b>91</b>
<b>Cognitive and cultural value of the sites of CH</b>	<b>91,25</b>	Using the opportunities of public-private partnership	89
		Better motivation and qualification of employees in these sites, creating interesting stories	89
		Involvement of local people, minority groups in the maintenance and restoration of traditional crafts related to CH	88

The leading recommendation is to improve the access / transport to the CH sites (94 points), which corresponds to the lower evaluation of the transport to the three large and external CH sites (between 72 and 75). Other recommendations relate to: more environmental activities (cleanliness, green areas, places to walk); increase state and municipal funds; better information and marketing; closer ties with schools, opening educational programs; better motivation and qualification of the employees in these sites and creation of interesting stories; involving local people and restoring traditional crafts related to CH.

In the free answers, a total of 392 respondents gave recommendations for improving the protection of all CH sites in the city, with the highest share (24 %) drawing attention to insufficient advertising and the need to restore commercial establishments around these sites.

Terzić et al.<sup>16</sup> received similar recommendation on heritage from the surveyed citizens in the Danube Region of Serbia: renovation and restoration of buildings, lighting and cleaning of the area, installation of benches and rubbish bins,

information boards, parking spaces, shops and workshops, cultural events, etc.

#### 4.3. Assessment of the quality of life in the town of Shumen and recommendations for improvement

Citizens' assessment of the quality of life in the city on different dimensions outlines two extreme situations – a high evaluation of the conditions for raising children and educational opportunities and a low assessment of the quality of public services. The assessment of the municipal government, the general living conditions and the potential for economic development is relatively good. The assessment of public transport is lower both in the city and between the city and the surrounding settlements. In terms of population movement, the city seems to attract people, but there is also the possibility of emigration to more developed places in the country or abroad. The individual statements on this issue are summarized in six dimensions. Citizens' recommendations for improving living conditions in the city and making it a more attractive place to live and visit are also grouped into six groups. The comparison between the two types of assessments is given in **Tab. 3**.

<sup>16</sup> Terzić et al. 2014: 192.

**Table 3.** Average assessments of the quality of life in the town of Shumen and recommendations for its improvement

Statements about the quality of life in the city of Shumen	Average rating	What is missing / what would you recommend to improve living conditions in the city	Average rating
Raising children and education	79	- no recommendation	-
Municipal government and urban living conditions	71	Better social policy, municipal housing, personal safety	88.3
		Better urban planning, more parks and green spaces	87.5
Public transport	64	Better public transport, streets and sidewalks	89.5
Economic development	66	Business conditions, entrepreneurial skills and new jobs	90
Immigration and emigration	60	Conditions for retraining, support for traditional crafts and local farmers	87
<b>Utilities</b>	<b>41</b>	<b>Better and more affordable utilities (water, electricity, heating)</b>	<b>94</b>

The lowest score (41 points) for the current situation with public utilities and the corresponding recommendation for its improvement with the highest value (94 points) are clearly visible. Other recommendations also have higher values than their current assessment. There is no recommendation on the conditions for raising and educating children, probably because the current situation in these dimensions is very high (79 points).

In the context of increased competition between CH destinations, increasing the benefits of cultural tourism requires combining CH investment with the improvement of the overall urban environment<sup>17</sup>. 'Without these infrastructures (roads, waste management system, etc.), tourism is unlikely to prosper', as mentioned already in scholarship<sup>18</sup>.

#### 4.4. Declared intentions to engage with activities for CH protection

Nearly 74 % of the respondents say that they like to participate in events dedicated to CH. On average 68 % of the respondents state that when they have time, they participate (or would participate) in the activities for CH protection in the city. About 60 % of them would be involved with volunteer work in initiatives related to the development of CH sites in the city. However, a significantly lower share of respondents would engage in a campaign to donate funds for the protection of CH sites (56 %).

Other studies also found that respondents acknowledge the cognitive and aesthetic benefits of participating in cultural heritage, but are reluctant to increase their participation in maintaining it<sup>19</sup>. The results of Gunjić<sup>20</sup> show that although locals are

aware of the importance of cultural heritage in their city, there are no initiatives for its development. The local community expects the authorities to deal with infrastructure improvements and what is offered to visitors.

#### 4.5. Willingness to Pay for visits to various sites and Willingness to donate

Research in cultural economics uses the method of expressed preferences or 'Willingness to Pay' to assess the social (non-market) benefits of CH sites<sup>21</sup>. When asked, depending on your possibilities, what is the amount that you think is reasonable to pay for a visit to the following CH sites in the city, an average of 94 % of respondents indicated up to BGN 5 and nearly 5 % indicated up to BGN 10. The rest amounts of BGN 15 and up collect less than 1 % of the answers. Therefore, despite the high assessment of the importance of these sites, their use is seen by locals with minimal costs.

On average, 87 % of the respondents answered the question how much they are willing to donate once for the protection of various sites of CH in the city of Shumen. On average, 25 % of them indicated BGN 0, which means that such donations can be expected from about 62 % of respondents. The largest share among them (51 %) have indicated the amount of BGN 5, and another 4.5 % have indicated the amount up to BGN 10. Higher amounts collect very low percentages.

Research on philanthropy reveals that personal donation to the CH sites is a form of pro-social behaviour, most often determined by personal motivation<sup>22</sup>. Maybe because of that there are differences in the preferences of different income groups between the three major CH sites

<sup>17</sup> Capello et al. 2019: 15.

<sup>18</sup> Otero 2013: 34.

<sup>19</sup> Musialik and Malik 2020: 182.

<sup>20</sup> Gunjić 2017.

<sup>21</sup> Yung and Chan 2015.

<sup>22</sup> Bertacchini et al. 2011: 43.

near the city and the sites within the city itself, such as churches and RHM. Middle- and middle-income earners are more likely to make donations with higher amounts than high-income earners. People with the highest incomes, for the most part, refrain from donating to large CH sites around the city and RHM, probably believing that they are the concern of the municipality and the state. At the same time, these individuals are more represented among potential donors with larger sums for churches and the Tombul Mosque in the city.

According to NSI data from 2021, the total number of inhabitants of Shumen municipality is 86,387 people, of which 52,124 are of working age; 21,246 are of overworking age; and the remaining 13,017 are of under working age. Assuming that half of people over working age are also willing to donate, it can be assumed that the total number of potential donors is 62,000. According to the average shares of the persons in the sample, willing to donate with different amounts, the following **Tab. 4** is obtained.

**Table 4.** Estimation of the amount of potential one-time donation by the citizens of Shumen for the development of one CH site (in BGN)

Preferred donation amount	0	Willing to make donations to CH					Total	No answer
		Up to 5	Average 8	Average 17.5	Average 40	100 и >		
% of respondents	25 %	51 %	4,5 %	3,0 %	2,5 %	2 %	87,3 %	12,8
Estimation of the number of potential donors	15500	31620	2790	1860	1550	1240	54126	7936
Estimation of the amount of donations	0	158100	22320	32550	62000	124000	398970	0

Thus, the one-time donation from the residents of Shumen for the development of one of the CH sites would amount to nearly BGN 400,000. This amount is conditional insofar as it reflects an opinion and not a real donation. Even if it were halved due to the conditional nature of the 'donation', the amount would be very useful for some of the CN sites.

#### 4.7. Reasons to recommend or not to recommend acquaintances to visit the sites of KH in Shumen

Of all respondents, 93 % would recommend relatives and acquaintances to visit some of the sites of CH in Shumen, 6 % were hesitant and only less than 1 % would not make such a recommendation. As reasons for visiting these sites are noted that they provide knowledge about the history and culture of Bulgaria and the region; allow a pleasant combination of a walk-in nature with cultural and historical knowledge; the city as a whole is beautiful, accessible and there are other interesting places. However, three of the reasons collect less than ¼ of the respondents who would indicate these as attractive, while at the same time they were not selected by more than 70 % of them. The highest percentage of respondents (76 %) did not choose the statement that ticket prices and entrance fees are affordable for the majority of visitors. A little over 71 % did not choose the reason that authentic and original souvenirs for unforgettable memories are offered in these sites. Also, 70 % of the respondents would not point out

as a positive reason the fact that the stories of the curators of the sites are very exciting and evoke strong experiences.

When asked about the most important reasons why the respondents would not recommend acquaintances to visit some of the sites in the city of Shumen, over 99 % of them did not answer. Only 5 respondents (1 %) said that there is no convenient transport for visitors, no lift or other convenient vehicle. The results of other studies also show that both local and external visitors are attracted by places with CH that are accessible, offer good value for money, and interesting stories from curators<sup>23</sup>.

## CONCLUSIONS

The analysis of the opinions of the surveyed citizens allows us to draw some conclusions related to the development of both the CH sites and the city of Shumen. On the one hand, the locals are proud of these sites and a significant part of them would participate in activities for their protection. On the other hand, it is expected that visits to CH sites will not require high costs. Although just over 60 % of the respondents are inclined to one-time donations for these sites, the prevailing attitudes are for minimal amounts.

The main problem of the three major sites of the CH outside the city (Madara, Shumen Fortress and the complex 'Creators of the Bulgarian State') is access and lack of public transport, but also

<sup>23</sup> Shaw et al. 2020: 1.

the need to restore commercial establishments around these sites, insufficient advertising, the lack of authentic and original souvenirs, and the insufficiently interesting stories about these places. Such problems for life in the city itself seem to be the quality of utilities, public transport,

underdeveloped business conditions and job creation.

Undoubtedly, solving these problems would contribute to making the city a more attractive destination for cultural tourism and a more pleasant place to live.

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## Оценка на културното наследство в град Шумен от местните жители и намерения да допринесат за неговото развитие

Желю Владимир

Изследването има за цел да разкрие оценката на някои обекти от културно-историческото наследство (КН) в град Шумен от местните жители, възприемания принос на тези обекти за развитието на града и намеренията на гражданите да допринесат за тяхното опазване. То се базира на Place standard methodology. Данните са получени чрез стандартизиран въпросник от 510 жители на Шумен.

Резултатите показват, че от една страна, местните жители се гордеят с тези обекти и значителна част от тях биха участвали в дейности за тяхното опазване. От друга страна, преобладават очакванията, че посещенията на местата с КН не би трябвало да изискват големи разходи. Малко над 60 % от анкетирания са склонни към еднократни дарения за тези обекти, но доминиращите нагласи са за минимални суми дарения.

Основните проблеми за посещения на трите големи обекта на КН извън града (Мадара, Шуменската крепост и комплекса „Създатели на българската държава“) според гражданите са достъпът и липсата на градски транспорт. Другите слабости се онасят до необходимостта от възстановяване на търговски обекти около тях, недостатъчната рекламата, липсата на оригинални сувенири и не особено интересните разкази на кураторите за тези места. Такива проблеми за живота в самия град изглежда са качеството на комуналните услуги, градският транспорт, неразвитите условия за бизнес и недостатъчното създаване на нови работни места.

Несъмнено решаването на тези проблеми би допринесло за превръщането на града в по-привлекателна дестинация за културен туризъм и по-приятно място за живеене.

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