

## THE PLACE OF THE SHUMEN REGION IN THE HIERARCHICAL STRUCTURE OF THE TOURISM SECTOR (ON THE BASIS OF CULTURAL TOURISM)

**Abstract:** The article examines the hierarchical structure of the regionalization of the tourism sector and attempts to identify the position of the Shumen region in it. The cultural and cognitive tourism – being the predominant types, have served as a base of the study. Certain socio-economic indicators have been analyzed and a comparative characteristic of the different ideas (adopted for the inclusion of Shumen in the tourist regionalization) has been made. The discussed LoCuS-es have been analyzed as a form of concentration and specialization in tourism resources. Finally, a suggestion for the formation of the Shumen region as a tourist micro-region has been made, substantiated by relevant facts and evidence.

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Historically, the city of Shumen and the region around it has been a part of various hierarchical spatial schemes of the tourism sector. In a previous regionalization, for example, the city has been placed within the so called “Old Bulgarian capitals” region. The region encompassed areas such as Veliko Tarnovo district as well. Here we give our standpoint on why such approach is inapplicable.

Meanwhile, as of the summer of 2015, a new tourism regionalization of the country was introduced. According to it Shumen district is within the Danube tourist region. In purely geographical terms, there is nothing wrong with that. However, it is clear that although the area between Vidin and Silistra has been defined as one region, the differences within that area exceed the similarities. The critical analysis of this idea is going to be the subject of other publications of the authors. Here we present our vision of the tourism regionalization of Shumen district as part of the general and subordinate hierarchical structure of a formed economic sector, which exists as a single "organism".

We are aware of the fact that we mean cultural tourism in particular while making the analysis that follows. But the indicators in the table below give us a clearer picture of the uneven development of the different areas within the same tourist region.

Table 1 Relative share of tourist base and tourism activities in Targovishte and Veliko Tarnovo districts in 2002 and 2006 (%)<sup>1</sup>.

District	Year	Population	Beds	Bed-nights	Nights spent			Visitors			Revenue
					total	of which		total	of which		
						Bulgarians	foreigners		Bulgarians	foreigners	
Targovishte	2002	1.8	0.2	0.2	0.1	0.3	0.0	0.4	0.6	0.1	0.1
	2006	1.7	0.2	0.4	0.2	0.4	0.1	0.4	0.5	0.2	0.2
V. Tarnovo	2002	3.7	1.6	2.3	1.2	2.6	0.3	3.4	4.6	1.1	1.1
	2006	3.7	1.3	2.2	1.3	3.2	0.4	3.1	4.8	1.0	1.0

Source: National Statistical Institute

<sup>1</sup> As of 2015 the trends concerning the discussed districts show no changes

The table shows that the tourism development in these two districts is extremely uneven. In 2006 Veliko Tarnovo district generates 3.2 % of the nights spent nationwide, while the share of Targovishte district is only 0.4 %. The ratio between other indicators is similar. Clearly, the basic principle of homogeneity in the formation of the tourist region has not been taken into consideration. There is no way that these two districts belong to the same tourist region. The situation is similar regarding Shumen district. Its indicators are also lower than those of Veliko Tarnovo district. Obviously, the delineation of the "Old Bulgarian capitals" region, done by the then-existing National Tourism Agency (NTA) was not based on substantial scientific arguments. This also applies to the rest of the tourist regions in the country. The only guiding idea for the Agency was that the national territory was completely covered by the tourism regionalization. As Fig. 3A shows, provided that scientific arguments are applied, the national territory does not necessarily need to be fully covered in the process of tourism regionalization. This can only be considered natural, since part of the territory is neither specialized in tourism, nor does tourism have any significant prevalence in the local economy. Moreover, the analysis of the data shows that such regions fall considerably behind others.

We believe, therefore, that Shumen district should be defined as a separate tourist micro-region. Apparently, its inclusion in the "Old Bulgarian capitals" region is not appropriate enough. The tourism indicators of the region differ significantly from those of the others regions and its values are similar to the indicators values of other tourist micro-regions. A major indicator, such as the tourist intensity exhibits similar values throughout all micro-regions defined by the authors<sup>2</sup>. Shumen district neighbours regions which do not have similar or even close values of tourism indicators (criteria). The data analysis reveals that neither Targovishte district, nor Razgrad district can be attached to Shumen region so as to form a higher hierarchical group. Thus, the territories of Veliko Tarnovo and Shumen districts remain isolated from each other. Again, the principle of homogeneity, discussed above, can not be implemented. Therefore, in our opinion Shumen can and should be defined as a separate micro-region.

#### **Benefits from defining Shumen district as a separate tourist micro-region?**

The positive effects of that can be:

- Opportunities for self-branding;
- Easier management and utilization of financial assets;
- Easier recognition;
- Lack of competition between the rest of the territories delineated by the NTA;

Negative effects can be:

- The lesser degree of hierarchical subordination could be a downside in the process of allocation of funds;
- Ability to offer a more limited tourist mix;
- Problems with the provision of appropriate staff.

Although briefly discussed, the issue of tourism regionalization is a serious one. It becomes clear that tourism regionalization can only be applied after a sufficient set of primary statistical information and its proper interpretation. Regionalization is not an end in itself. It entails many management decisions. Let us recall how the Administration assigned, in a purely "mechanical" way, the districts of Pleven and Lovech to the Northwest region, with the sole purpose to meet the requirement of a population minimum (of over 850 thousand residents) for the NUTS II-level regions. Such an act distorts the statistics and conceals most of the demographic and socio-economic problems in Northwestern Bulgaria. The proposed alternative regionalization has its weaknesses, but it is done in order to apply scientific methods and criteria. In our view Shumen is a formed tourist micro-region and should not be placed within the "Old Bulgarian capitals" region outlined by the NTA in recent times. Such a region practically does not exist. The same applies to the newly formed Danube tourist region.

*The tourist LoCuS-es as an alternative to the tourist regionalization in cultural tourism.*

Bulgaria is a country rich in diverse cultural heritage and its uniqueness is a result of the immediate interaction between cultural, historical, archaeological and natural resources. The local

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<sup>2</sup> Similar indicators' values can be seen between micro-regions and tourist regions "in formation". The difference between these two and why such division exists are a subject of additional analysis.

systems strategy should contribute to highlighting this singularity, aiming to connect the resources of a given area within a common framework, which should be able to turn those resources into factors for amplifying the tourist attraction and hence - factors for economic development.

The main unit in the strategic plan is the so-called LoCuS - an acronym which stands for Local Cultural System (*sistema locale culturale*), i.e. an area which, by sharing values, cultural resources, territory and infrastructure systems, is able to combine the various elements of a potential tourist offer aimed at a specific target group. This is a complex concept that unites the territory with its cultural resources, the relevant topics and the target market segment.

LoCuS means:

- a system based on the historical, cultural, ethnic and natural identity of the locations (= LOCAL);
- a concept for attracting visitors interested in getting to know the cultural values of towns and villages other than those in which they live permanently, in order to obtain new information and gain new experience so that they satisfy their cultural needs (= CULTURAL);
- an integrated combination of resources related to the historical and cultural traditions, fine and performing arts, the arts industry, all organized and interconnected by sharing a common vision for the region, strategies for its development, target market segment (= SYSTEM)

Choice of different LoCuS-es:

The joint analysis of territorial resources and sectors of cultural tourism allows the identification of 13 local cultural systems (LoCuS-es), different in their composition, type of resources and tourism development potential.

Identifying the LoCuS-es enables the determination of the potential offer, valid for the tourist market, as well as the presentation of advantages recognized by the visitors. Cultural heritage is able to create greater value if and when it is characterized by its identity, accompanied by its own distinguishing features.

The designated LoCuS-es reflect the variety and the diversity of cultural and natural resources of Bulgaria. Each LoCuS is presented by its own offer, each in a different way, but yet in direct relation to the overall plan for the development of cultural tourism in Bulgaria. In the process of identifying the LoCuS-es, the various elements of different regions and their tourism development potential were taken into consideration. In this sense, the cultural and natural resources of the territory were defined so that they can be brought into line with the theme chosen for each LoCuS. More specifically, for each LoCuS a thorough analysis of cultural resources, infrastructure, hotels availability and possibility of attracting visitors was carried out.

The development strategy, based on resources of both cultural and natural heritage of Bulgaria, has determined for each LoCuS the following:

1. Area of affiliation, which should not be regarded as strictly defined by unchangeable limits, but instead - as a selected area for designing, experimenting and implementing specific actions related to its development.

2. A market target, at which the strategies and products of cultural tourism are aimed. And in this case it is not about strong groupings but instead - about a process which would increase the importance of the given regions, their natural and cultural resources, in clearly defined market sectors.

3. The relationship between the LoCuS-es and the main directions of cultural tourism development in Bulgaria, suggests that each LoCuS can perform a separate role and yet complements the other LoCuS-es in the presentation of the country as a destination for international cultural tourism, and also in the modification of the tourist behavior of those who already frequently visit Bulgaria.

The choice of a main theme for each LoCuS should improve the communication with the market through its impact as a market brand, as well as the convergence of political factors and the business world into a common horizon through its impact as a starting strategic framework.

In particular, for the visitors themselves, the choice of a main theme would be the basis on which a variety of concepts of different tourist offers is created, turning this formula into guarantee to visitors for the high quality of the territory.

### *The LoCuS-es in cultural tourism:*

- *LoCuS 1 „Great Sofia”*
- *LoCuS 2 „The Valley of the Kings”*
- *LoCuS 3 „The Bulgarian Renaissance town”*
- *LoCuS 4 „Along the banks of the Danube River” – the cities of Pleven and Ruse being the main administrative and cultural centers of the LoCuS.*
- *LoCuS 5 „Stone heart” is a tourist destination mainly for Bulgarian tourists. In the future, the rising of the role of cultural tourism in the cities of Stara Zagora and Sliven can spread its meaning among foreign visitors as well, including those visiting the Black Sea coast.*
- ***LoCuS 6 "The Old Capitals" - based on the uniqueness of the Madara Horseman - aims at the formation of an integrated tourist offer - services and events for changing the nature of the tourist visits - from excursions (mainly to the Black Sea coast) to a cultural experience. The aim is to increase the duration of stay.***
- *LoCuS 7 "On the shores of the Black Sea" – cultural tourism in this region is of secondary importance in relation to recreational tourism.*
- *LoCuS 8 "Strandzha Mountain" has a considerable potential in terms of ecological and cultural sectors thanks to its natural, historical and cultural resources.*
- *LoCuS 9 "The Sword and the Cross" - its strategy is based on the promotion and affirmation of the unique symbol of that area - Perperikon – which is expected to become a cultural tourism center of the whole region.*
- *LoCuS 10 "Plovdiv and the Roman Empire" is rich in cultural and historical heritage.*
- *LoCuS 11 "The Gate of the Rhodopes (The Rodopi Mountains)"*
- *LoCuS 12 "The Big Mountains" is the leader in winter tourism and skiing.*
- *LoCuS 13 "The Petrified Forest" is of importance mainly to the local tourist demand.*

LoCuS 6 "The Old Capitals" is obvious concentrated around tourist sites such as Madara, Pliska, Preslav and those in the city of Shumen. From this perspective, a clarification is necessary: the idea of the Ministry of Culture suggests a targeted financing of these tourist sites and this is also the main purpose of the proposed regionalization. However, this targeted financing can only be done for individual tourist sites, for example - the Madara Horseman. The idea of regionalization is that a defined area, geographically established and appreciated for its cultural, historical etc. resources should develop a certain type of tourist activity. Thus, through the LoCuS-es, many of the locations with a certain tourism potential, which hasn't been used so far, will be deprived of such funding.

While there is some overlapping between a tourist region and a LoCuS, the geographical and the regional principle should be the leading ones. *Would there be a problem if the LoCuS was determined within the Shumen district limits (or at least within the municipalities of Shumen, Novi Pazar and Veliki Preslav)?*

We believe that from a regional development point of view, for the purposes of proper functioning and financing of a particular region, regionalization in its geographical essence should be implemented, namely – the concept of micro-regions. Even in terms of statistical observations and comparisons that would be a more appropriate option. The LoCuS has its cultural and cognitive significance. If it is used in regionalization processes, the LoCuS can follow the limits of the administrative units. Or even better - it can serve as a basis for delimitation of micro-regions. It is our opinion that this does not deny the logic of the region-formation process or any of the localization theories. However, we believe that from managerial and geographical standpoint, the term “**micro-region**” is more accurate.

Considering the suggested hereby possible solutions to some of the problems of the development and management of tourism in Shumen district, the following major benefits can be expected:

1. Revenues for hotel owners as a result of organizing and conduct of multi-day festivals so as to increase the load on accommodation facilities – as it was noted, tourists who visit cultural and historical heritage sites in the region do not usually stay overnight.

2. The Romanian tourist contingent is an unexploited niche. The possibility of attracting this contingent into visiting the region of Shumen will increase the revenues from cultural tourism.

3. From the perspective of the local and regional authorities, the establishment of a tourist cluster will have its multiplier effect on other economic sectors as well. Unemployment, rural development and the exposure of new, unknown sites and customs of our intangible cultural heritage would also be positively affected.

4. The organization of cultural tourism in regional aspect based on the formation of clear, in terms of boundaries, micro-regions or LoCuS-es, will serve as a base for their effective management and financing.

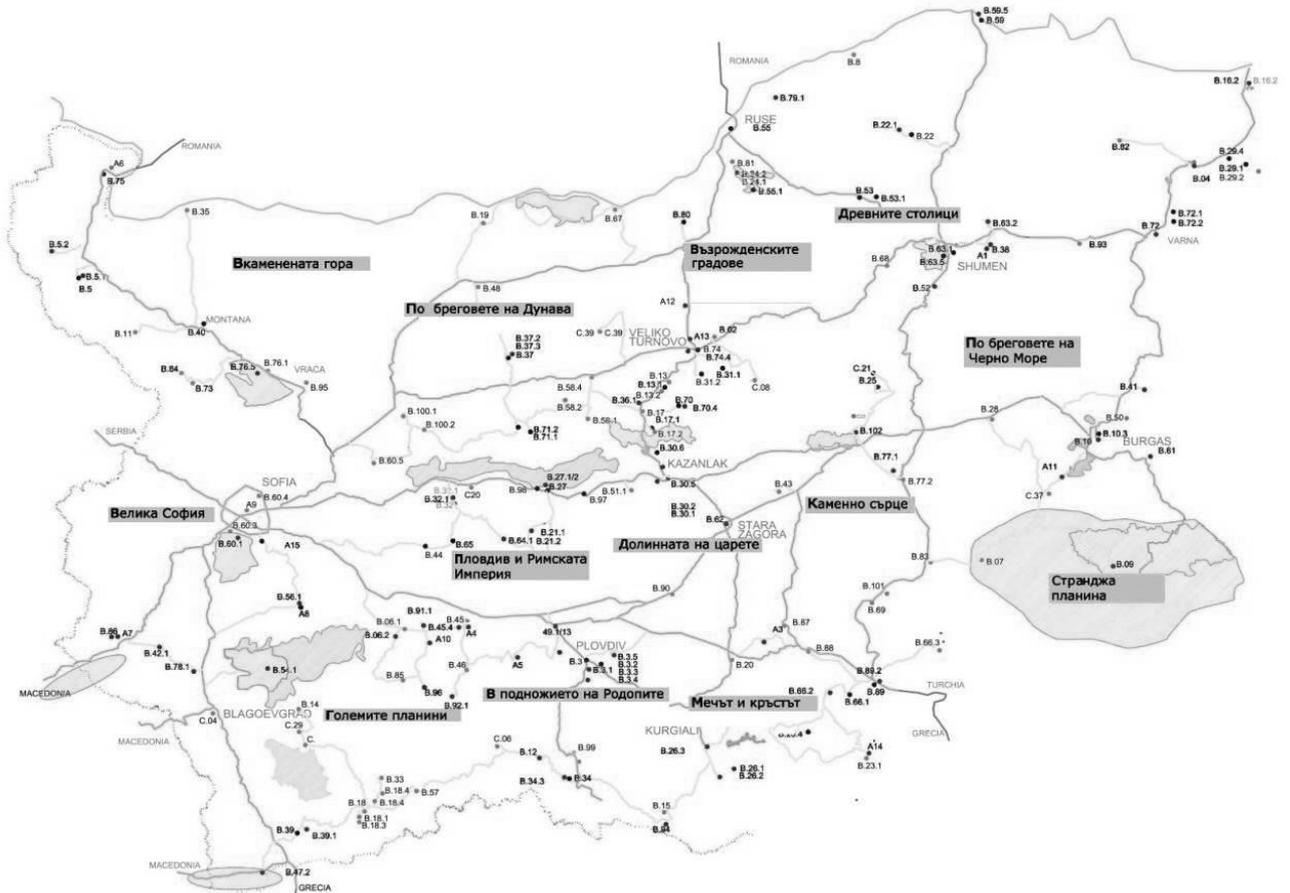


Fig. 1. Cultural tourism LoCuS-es