

## Article

# An Attempt to Estimate the Social Value Resulting from Making Cultural Heritage Available in the Form of a Tourist Product

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**Abstract:** Cultural heritage tourism is a multidimensional tourist activity because, apart from the advantages associated with practicing tourist activity, it is particularly associated with cognitive motives when it comes to practicing it, and even with discovering cultural identity. Such an activity has a specific value in relation to the adopted perspective. Researchers often attempt to determine the value that a tourism-related product has for the customer (tourist). Sometimes, it is defined as the value captured by the entity providing the tourism product. However, it is extremely rare for research to assess the social value of tourism. The aim of this work is to identify issues that can be used in measuring the social value resulting from cultural heritage made available in the form of a tourist product. The authors review the literature on cultural heritage and cultural identity, and then use a particular methodology to develop a tool for assessing social value. To develop their own research tool, the authors use the results of research conducted in 2021/2022 among managers of 70 cultural heritage tourism facilities in Europe. As a result, a tool was created that includes six statements that can contribute to the assessment of the social value resulting from the provision of material cultural heritage in the form of a tourist product. The reliability of the tool was estimated at 0.69 and its standardized rating at 0.71. The social value of cultural heritage, in the opinion of experts, achieved an average rating of 4.06 (on a scale from 1 to 5), with the 6-item version of the tool attaining an average rating of 4.10. Taking into account the usefulness of the proposed solutions, remember that the paper reflects only the European vision, which is one of many possible views.

**Keywords:** cultural heritage; heritage tourism; social value; tourism product



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## 1. Introduction

Cultural heritage made available in the form of a tourism-related product holds great value for many beneficiaries, including tourism enterprises, tourists, and even the local community. Stakeholders of a tourist destination in an area where cultural heritage tourism dominates, for example, receive substantial benefits. The literature classifies these values within three dimensions [1–3]. We can mention the economic dimension, which provides economic value to enterprises and organizations, offering access to heritage (in the form of profit, market shares, etc.). Cultural heritage may also be of significant use to recipients (tourists) by providing them with many impressions and other elements. However, the least researched dimension is the social dimension, expressed in the benefits deriving from cultural heritage tourism. Although this issue has been the subject of research, little is still known about the elements that should be taken into account when constructing a measurement tool that can be used to assess the value of cultural heritage in the social dimension.

The research problem addressed here requires the development of a set of statements assessing the social dimension of cultural heritage, as well as the verification of this tool

by estimating its reliability and discriminatory power. Therefore, the aim of this work is to identify issues that can be used in measuring the social value resulting from cultural heritage made available in the form of a tourist product. This is a very complex research task, but it is also undertaken to contribute to the discussion on the development of tools for measuring social values, which are extremely difficult to estimate due to their elusiveness. This article is limited to the value resulting from tangible cultural heritage. Before this happens, however, it is necessary to mention key issues regarding cultural heritage and tourism for cognitive reasons.

## 2. Heritage Tourism

Contemporary data on the world heritage that humanity protects in a special way includes 1154 objects of diverse nature [4]. The vast majority of them are cultural heritage objects, while the rest constitute natural and mixed heritage. However, it is worth noting that cultural values are divided into four categories [5]. The first is material heritage in the form of movable, immovable, and underwater heritage. The second group is intangible heritage, i.e., oral traditions, rituals, and crafts, while the third category consists of natural heritage, within which literature includes geological, biological, and physical formations, as well as landscapes. The last category is cultural heritage at risk of destruction and destruction in armed conflicts.

One of the key forms of popularization of and learning about cultural heritage is the activity of visiting heritage sites through tourism. Thanks to the undertaken tourist activity in places of cultural heritage, it becomes both an important cultural resource of contemporary communities and an economic resource in the form of value.

The literature on business models cites many studies on value. Generally, value in the model approach is divided in three categories—value for the customer, value captured by the organization providing it, and social value, i.e., a set of values for the local community. A. Szromek's [6] research on values resulting from cultural heritage in Europe proves that among the key values from the first group, i.e., customer values, is the satisfaction of cognitive needs by cultural heritage. The values captured by the organization were dominated by the strengthening of the brand thanks to the presented heritage, but also satisfaction with the implementation of the social mission, as well as direct customer satisfaction. Finally, the category of social values is dominated by the promotion of historical industrial heritage and by the fact that cultural heritage serves as a local symbol.

F. Varet et al. [7] remind us that social value can be considered in two dimensions, as social desirability and social utility. The social desirability dimension refers to the perceived quality of the person's interpersonal relationships, while the social utility dimension refers to the perceived competence and resources investigated by the person in its activities [8].

In turn, L. Franchin et al. [9] emphasize that various profiles of social value orientation can be found in the literature: individualist, competitor, cooperator, egalitarian, and altruist. However, they can be grouped into two macro-labels: proself (individualists and competitors), i.e., people who tend to accept unfair distribution of resources, but only to their advantage, and prosocial (cooperators, egalitarians, and altruists), i.e., people who prefer a fair division, even if they could benefit from an unfair division. In the context of the conducted research, it is about the social value generated by the activities of cultural heritage tourism, which, similarly to the human dimension, can take prosocial and antisocial forms. The first one favors the environment of heritage tourism sites, cooperating both for their own benefit and for the benefit of the residents, and the second one degrades the local community by draining local resources.

However, social value in the economic context is determined by two basic meanings, discussed by D. Mihailov [10]. The first meaning concerns the value that tourism activity brings to society, then social benefit is one of the goals of that activity. The second meaning refers to social processes as new ways of taking action, as new social practices, behaviors and institutions, or new relationships between stakeholders [11].

A very important contribution to the measurement of heritage value was made by Q. Fang and Z. Li [12], who, in response to the unclear definition of heritage value, developed a conceptual model and a system of indicators for the value of traditional rural heritage based on cultural ecology. The measurements allowed them to introduce their own typology of traditional villages and propose improvements to their management processes.

In turn, A.R. Szromek and R.W. Butler [13] discuss the value and importance of heritage through the prism of the Industrial Monuments Route in Poland (IMR)—one of the largest post-industrial heritage tourism routes in Europe. However, L. Weng et al. [14] decided to study the impact of tour interpretation on perceived heritage values. Thanks to this, it is known that tourists focus more on the contents of the interpretation than on the media through which the interpretation is delivered. Moreover, this research analyzed the differences in the values of cultural heritage perceived by tourists in interpersonal and impersonal interpretation scenarios. It turns out that interpersonal interpretation is superior to impersonal interpretation in providing heritage value.

Still, further research is presented by the team of R. Lawton et al. [15], who measured the economic value of heritage. They designed an online survey tool used to collect information on many heritage objects. A valuation scenario and payment vehicle were used.

### *2.1. Heritage Tourism Functions*

Heritage tourism, one of the oldest leisure travel practices, is a significant tourism industry sector. It refers to the practice of visiting places because of their links to cultural, natural, and intangible heritage [16]. Travelers practice heritage tourism to experience places, artifacts, and activities that are authentic and represent the stories and people of the past and the present [17]. Recently, we have seen a tendency to expand research on heritage tourism, which is dictated by a rapidly growing heritage tourism industry [18].

One of the important attributes of heritage tourism is authenticity, which is recognized as a universal value and an important driving force motivating tourists to travel to remote places [19]. Research on heritage in tourism has focused on specific ecological, economic, political, cultural, and health impacts.

Heritage can contribute to economic development (including the tourism economy). It is a tool for the enhancement of social cohesion [20]. What unites people testifies to their separateness and history; it is a huge value on the basis of which various prosocial and proeconomic activities can be undertaken.

Cultural heritage (including culinary heritage) is of great importance for the level of satisfaction with services [21]. Research by C. Brooks et al. [16] showed that cultural tourism had both positive and negative effects on the social determinants of health. Positive effects were related to economic benefits, infrastructure development and improvement of social services. However, cultural tourism has also had a negative impact on community health, a phenomenon which has been ascribed to loss of access to land, loss of livelihoods, relocation and/or fragmentation of communities, increased migration, increased crime, and the erosion of culture. Therefore, while heritage tourism can be a poverty alleviation strategy, its success depends on the right governance processes—a holistic view of the benefits and harms of sustainable tourism [16].

The benefits that can be obtained from heritage tourism depend on several factors—not only the attractiveness of the place, customs, historical, or sentimental values, but also the involvement of all stakeholders in the tourism area. For example, research on the effectiveness of pilgrimage tourism has shown that itineraries depend on several factors, including travel convenience, accommodation options, ability to perform pilgrimage rituals, and institutional management for tourism [22]. Managers of cultural heritage sites need to remember to ensure authenticity, culinary appeal, atmosphere, and quality of service [23]. Other research conducted in Indonesia has shown that the visual qualities, atmosphere, and spaciousness of a place are important in enhancing the attractiveness of cultural heritage. These factors were especially important to young people [24].

It is important to notice the positive and negative effects of tourism development in economic and natural terms. When writing about the functions of heritage tourism, one should bear in mind the compromise and synergy between heritage protection and tourism development [25]. B. McKercher and H. Du Cros [26] point out that some time ago it was claimed that the benefits of economic development outweigh any unfavorable costs that such development may incur. This is now considered to be a myopic view and emphasizes a balanced approach, encompassing both beneficial and harmful impacts on host communities and their cultures. These negative effects include overuse by tourists, tourism dependency, tourist behavior, unplanned tourism infrastructure development, limited beneficiaries, loss of control over cultural property, and physical deterioration of assets. However, the positive effects include awareness of the need to protect and preserve cultural heritage, development of local economies, co-financing of local infrastructure, revival of traditional culture, increased tolerance for cultural differences in multicultural societies, and increased investment in documentation, planning, and management of cultural heritage assets.

Research in cultural heritage tourism is carried out by researchers dealing with culture as well as tourism economics, history, and many other scientific trends. This is evidenced by numerous conferences, discussed in scientific communications, for example, by researchers such as B. Weiler and S.F. Witt [27], as well as I.P. Tussyadiah [28]. G. Ashworth [29] cites conference reports containing even a whole volume of case studies, usually from a single site.

There are other studies in the literature, not discussed here, which also deserve at least a mention. These are studies described by M.P. Hampton [30], D.J. Timothy and S.W. Boyd [31], J. Tribe [32], N. Ginting [33], and G. Richards [34]. Noteworthy is also research by Y. Li and R. Lap Bong Lo [35] on heritage tourism in Hong Kong, research by D. Rahmawati et al. [36], and classifications cited by G. Ismagilov et al. [37]. The interesting research by M.-R. Surugiu and C. Surugiu [38], who discuss the role of social media in supporting the development of entrepreneurship related to cultural heritage tourism in Romania, or the work by the team of Z. Bujdosó et al. [39], which identifies changes in the perception of cultural heritage development experiences, should not be omitted. J. Franczuk et al. [40] cite interesting research on the use of virtual reality in heritage tourism. Among the advantages of such a solution, they indicate the unlimited time of visiting and getting to know the object, its history, and details. It is also an important channel for the promotion of the region and the creation of its tourist brand.

Interesting research and an applicable methodology were proposed by L. Wang and S. Xiao [41], who investigated the South China Karst World Natural Heritage Area using actor network theory in a case study of the Shibing Karst space. They showed that Shibing Karst experienced two consecutive space reconstruction processes, the normal tourist site construction phase and the world heritage site construction phase. They also noticed that initially foreign companies became the new actors in this space, with residents successively and gradually gaining more decision-making rights. An important role was also attributed to the UNESCO World Heritage Committee and the World Heritage Centre, which oversee these relations.

M. Licata et al. [42] reflect on the consequences of COVID-19 in the context of heritage tourism and recognize the need to develop new strategies. Their proposal is to emphasize lesser-known cultural heritage, an approach which could lead to a reduction in mass visits to key tourist attractions. An example is an open-air museum at bioarchaeological sites, which can include many walking and virtual routes and, thus, offer a new visiting experience.

Research perspectives related to the management of heritage tourism facilities are also familiar. B. Garrod and A. Fyall [43] conducted research on all historic buildings in the UK, asking about three main issues, i.e., the basic mission of the building, factors influencing the decision to charge admission fees, and the perception of the role of buildings and public

agencies in financing conservation heritage tourism. This topic is addressed with regard to Destination Management Organizations (DMOs).

However, another threat to heritage tourism should also be mentioned, which may be mass tourism. Z. Barišić Marenčić et al. [44] cite an example of industrial heritage being overshadowed by the values of historic cities. The article notes that the advantages of historical tourism attracting the attention of tourists often make industrial complexes gradually become a redundant relic of the past.

On the other hand, L.T. Chai [45] notes that cultural heritage tourism in the urban environment acts as an engineering tool that raises the profile of the city in a globalizing world, but its further perspective related to the preservation of the authenticity and integrity of cultural heritage is less optimistic. However, this is related to the protection of heritage, which, if preserved for at least one generation, constitutes a valuable intellectual resource for the local population.

A.P. Russo et al. [46] cite yet another interesting aspect revealed in the studies they describe. They note that cities wanting to protect their own cultural heritage reduce the focus on their heritage and conservation techniques and increase the impact on the quality control of complementary products, services for tourists, and accessibility.

## 2.2. *Caring for Heritage*

Heritage management processes can rely on a variety of managerial factors (e.g., resource allocation, strategic management tools) (e.g., [47–49]), as well as on social factors (e.g., value emphasis, tourist participation) (e.g., [50–52]). Modern projective programming and mapping technologies are also increasingly used [51,53].

It is important that research on cultural heritage tourism allows for the identification of the strengths and weaknesses of cities and entire regions. What is needed is knowledge about the spatial distribution of cultural heritage and various resources. The knowledge gathered in this way allows for political and economic decision-makers to make more informed decisions regarding tourism development (cf. [54]). Understanding and analyzing heritage environments as a significant driver of tourism development, especially in developing countries, is important for policymakers with respect to program operations and regeneration and development plans [48]. One of the possibilities offered is the use of simple and well-known strategic tools, such as SWOT analysis (cf. [48]) or its extended version TOWS/SWOT.

M. Št'astná and A. Vaishar [49] attempted to answer the question: why do two destinations with extremely valuable cultural heritage obtain completely different results in terms of tourism? Their study revealed significant differences in strategic planning. It turned out that in the case of one of the destinations, the historical heritage was only an added value. For other sites, the use of tourist heritage has been one of the main development priorities.

An essential task is to identify risk factors. It turns out that the main reason for the failure of plans to renew the heritage of urban areas is ignorance of the risk factors associated with tourism. Assessing tourism risks requires in-depth knowledge of the current situation [47].

An important role is also played by the system of social, cultural, and historical values, as well as by measures to eliminate the fear of change.

It is important for tourists to know how to evaluate the socio-historical and historical-cultural values of industrial heritage [52]. How decisions on heritage protection are made may also depend on the cultural outlook of the inhabitants [55]. In the business models of organizations providing cultural heritage, this aspect is called the customer value proposition, which, in the case of cultural heritage tourism, will be addressed by the tourist.

Another important task is overcoming resistance to the changes taking place. In this case, tourism managers must do their best to overcome resistance to change and resolve various controversies and community misconceptions that hinder the use of heritage. There is interesting research on the sustainable transformation of brownfields in Sweden in this regard. Della Lucia and Pashkevich recognized that community resistance and misconcep-

tions hindering the adaptation and reuse of industrial heritage are mainly determined by institutional norms resulting from industrial monoculture (cf. [50]). This also emphasizes the social value of cultural heritage related to the revitalization of the surroundings.

Actions taken must take into account the specificity of particular types of heritage. Thus, in the case of industrial heritage, elements such as spatial planning, improvement of the utilitarian function, and strengthening of cultural potential are important (cf. [41]). L. Wang and H. Zhichao [56] argue that holding demonstrations from the perspective of practice and adopting comprehensive development means is an effective way to solve different problems associated with industrial heritage tourism. Various studies increasingly emphasize that care for heritage must be linked to sustainable management. This is a very difficult task, but we must not forget the principle that economic development must not contribute to the destruction of heritage. Efforts should be made to preserve and protect it, and to properly plan places for visitors [51,57,58].

In the case of gastronomic tourism heritage, it is important to promote the heritage through activities such as tourist exhibitions, marketing activities, and promotion of the diversity the authentic food offers in catering establishments [59].

Taking care of heritage requires, above all, its confirmation and the demonstration of its authenticity. This is the case, for example, with research on the cultural heritage of sport (in this case soccer). Objective indicators of authenticity of original artifacts and authoritative confirmations are used. Cultural heritage indicators are then identified and linked to authoritative sources [60].

Tourists themselves can play an important role in the process of cultivation and protection of cultural heritage, especially in the so-called ancestral tourism, where visitors are actively involved in co-creating experiences in museums, archives, and related heritage sites [61].

Cultural heritage is increasingly promoted with the use of modern technologies. Implementing different technologies provides a visual operating environment for tourism, enabling heritage tourism companies to leverage user preferences so that users can effectively access the travel options of interest to them [53]. One study designed a tourist information statistical platform. It was built using secondary GIS programming technology and APIs of front-end programming technology HTML + CSS, Echarts, and other elements of image features [53].

Research on digital cultural heritage is interesting. It concerns the implementation of projection mapping (PJM) technology, projection viewing, and interactive programs in cultural heritage sites [35]. PJM technology is playing an increasingly important role in attracting visitors to museums, heritage pavilions, and various other heritage sites [35]. Virtual reality plays an important role in the tourism sector, particularly in enabling the experience of remote attractions [62]. To promote tourism and cultural heritage, the concept of gamification is also used, involving the application of elements of game design and game rules in non-gaming contexts. Applying this concept to interactive exhibitions has great potential to attract visitors and increase their fun, engagement, and learning [63].

It is also worth emphasizing references with respect to the concept of brand value as a central component of marketing theory and practice, already in use in the 1990s [64], which nowadays—according to S. del Barrio-García and M. B. Prados-Peña [65]—is one of the most commonly used brand performance indicators.

### *2.3. The Importance of Cultural Identity*

The question of cultural identity is at the heart of many debates in cultural studies and social theory that have been going on for years. One of the frequently discussed issues is whether those identities that have defined the social and cultural world of modern societies for so long are disappearing, thus giving rise to new forms of identification and fragmentation of the contemporary individual as a unified theme [66]. It is important whether people notice these threats and to what extent they can use their own cultural identification. Cultural identity:

- Strengthens consumer preferences and purchasing power of local brands [67]
- It is an important element connecting and rendering local communities distinctive that shape their own identity through the mechanisms of accepting, adapting, and rejecting specific elements of culture [68]
- Increases group preference and brand purchase [69]
- May be a factor affecting people's adaptability to a new environment (cf. [70])

Tourism-specific research has focused on negative effects on cultural identity [71], cultural disorientation and globalization phenomena [72–75], the use of local customs and cultural identities to enhance tourism potential [76–78], the importance of landscapes for cultural identity [79], and the importance of education for identity maintenance [80].

Research shows that tourism affects cultural identity. Various communities that rely on tourism as their main source of livelihood are actively changing their activities, image, or behavior to attract tourists and increase their profit [71]. L. Tavarez [71] identified three negative effects on cultural identity: (1) members of the community are marginalized, (2) culture is essentialized and commodified, and (3) these processes have a negative impact on traditions, customs, and values.

The phenomenon of cultural identity is complex in many respects. It is widespread, multi-layered, and has an active and passive form. On the one hand, cultural identification can be something that is attractive to tourists, while, on the other hand, some communities are forced to modify their identity as well as the services they offer in order to better cope with the challenges of global tourism. In this context, research on the development of the Balinese tourism industry is interesting. Representations of Balinese cultural identity have evolved from national, top-down constructs of “cultural tourism” to a global tourist destination through the organization of international events [73]. We observe a growing interest in tourism and growing crises of national, regional, and personal identity. Therefore, research is being undertaken to determine how globalization contributes to cultural confusion [74]. Some scholars speak explicitly of McDisneyization and cultural erosion [71].

Cultural potential, including strong identification with a specific type of culture, makes sense if it is strengthened and certain traditions and rituals are cultivated and passed down from generation to generation. This is happening in many parts of the world. Studies conducted in Mexico on the effectiveness of the Program Magical Towns (Programa Pueblos Mágicos) have shown that if tourism is properly organized and appreciates the importance of cultural identity, it can positively affect both the socio-economic level and the cultural identity itself, it can contribute to a sense of belonging and cultural preservation [76]. In the district of São Bartolomeu, the artisanal production of sweets, handed down for generations, attracts hundreds of tourists, and locals are actively involved in the organization of traditional events [77]. In turn, for the inhabitants of Spycimierz (Poland), the custom of laying flower carpets during church processions, cultivated for over 200 years, has become an important element to increase tourist attractiveness [78].

It is not only customs, beliefs, or rituals that are important for identity. Tourists are interested in beautiful, magical views and landscapes. Some studies have shown that the indigenous people of certain regions gain a slightly stronger cultural identity and autonomy from the impressive landscapes [79].

It is important that cultural identity is not only strengthened, but also properly communicated. Therefore, it is an important task to educate people engaged in tourism activities. Otherwise, cultural identities may be constructed by intermediaries (e.g., guides), whose interpretations of cultural meanings could be lost in translation [80].

#### 2.4. *Typology of Tourist and Their Cultural Identity*

The literature argues that identity-related motivations are fundamental to all touristic experiences and are essential to the understanding of why individuals engage in tourism and how they benefit from the experience. Tourism is often used by individuals as a means to discover, maintain identification, or even disengage from certain aspects of their identity [81]. It can be said that we are dealing with the search for identity through leisure

time (recreational activities). Falk [82] stated that “we affirm who we are by actively choosing and participating in recreational activities.”

J. Falk’s model of identity motivation [82] is enriched by multiple aspects of the theory of identity proposed, among others, by B. Simon [83] and J.P. Gee [84]. Individuals try to build both their personal and group identities and use their leisure time as a means to this end. This is confirmed by various studies carried out in art museums, zoos, aquariums, and science centers [85–87].

However, tourists also have features that determine their relationship to cultural identity. The aspect of tourists’ identity and their motives for their tourist trips has already been taken up by researchers. N. Bond and J. Falk [81] have reviewed the various studies in detail. They developed different typologies of tourist. These are:

- Explorers, i.e., people characterized by curiosity driven by general interest
- Facilitators, i.e., people who are socially motivated and focus on enabling the experience and learning in others
- Professionals/Hobbyists, i.e., those who feel closely related to the services offered due to their professional or hobby passion
- Experience Seekers, i.e., people who perceive places of stay as important destinations, and their satisfaction comes from being in these places and experiencing numerous sensations
- Rechargers, who primarily seek a contemplative, spiritual, or restorative experience

The specified types were supplemented by two more, limited to visitors to ethnic museums, sanctuaries, and memorial sites [81]. These are:

- Respectful Pilgrims, i.e., people who have a sense of duty to honor the memory of people represented by the institution/monuments
- Community Seekers, i.e., tourists who have a strong sense of heritage and/or personality

These categories are neither fixed nor mutually exclusive. The same person may be motivated by any of these factors, depending on the specific context of the tourism activity or the specific destination visited [81].

However, the problem is not only the motives, but also the duration of the stay, as well as the distance to the places visited. It can be assumed that, in the case of confirming spiritual and cultural identity, trips to nearby places (e.g., churches, historic buildings) predominate. On the other hand, in the case of longer stays, trips are predominant, aimed at (1) conscious or unconscious development of one’s own identity, and (2) searching for new elements and other identities.

To sum up the issues discussed, it should be noted that cultural heritage is an extremely interesting research issue, but at the same time it requires being able to capture many aspects of its social impact. It should be noted that the beneficiary of heritage may be both the local society and the visitors (tourists and visitors). However, expanding the group of recipients of cultural heritage requires its organization in the form of a tourist product. One of the key advantages of expanding access to cultural heritage, especially in the material dimension, is its ability to influence the cultural identity of the beneficiaries of the shared cultural heritage. Exhibitions, objects, building complexes, or even individual artifacts made available to the local and non-local community can generate different values for all stakeholders who have contact with the presented heritage. It can be a value offered to tourists and one-day visitors, as well as to local people who get to know a foreign or their own, although forgotten, culture. This may be economic value (so-called captured value), especially for tourism organizers and their contractors, but also for the local community which may benefit from tourism expansion. This may ultimately be a social value that brings benefits to the local community. These benefits concern not only material values, including financial ones, but also values related to building cultural unity and, at the same time, identity, which becomes the only guarantee of maintaining the continuity of local culture for subsequent generations. This action clearly meets the assumptions of



sustainable development, the aim of which is, among others, to care for local culture and unity as well as activation of local communities.

### 3. Materials and Methods

The study of new phenomena is based on observations and measurement of something that may not be directly observable (latent). Since the subject of research cannot be observed, its measurement is even more intuitive. However, it is possible to use methods of quantification of the phenomenon (measurement, scaling, and constructing an indicator) which bring researchers closer to a more accurate description of the level of the phenomenon [88]. Constructing original measurement scales is, therefore, helpful in obtaining an approximate quantification of the phenomenon under study. The measure obtained in this way is a theoretical and estimated variable resulting from the measurement of a specific feature representing (characterizing) the phenomenon under study.

The development of a new feature measurement tool may involve errors that are invisible in its overall assessment. It is then necessary to determine the reliability and validity of the created tools [89,90]. When assessing validity, it is helpful to validate the measurement tool [91]. It involves, among other things, the content assessment of the research tool. In turn, the reliability of the questionnaire measurement scale can be assessed with various measures. Most often, it is assumed that a scale is reliable if it has uniformity in terms of the answers provided (homogeneity). The analysis of the homogeneity of the scale can be carried out based on the value of the Cronbach's alpha coefficient (Cronbach's  $\alpha$ ). It takes values from 0 to 1, and the scale is homogeneous if it reaches 0.7 (although there are sources that allow scales exceeding 0.6). It is expressed in the Formula (1) [92]:

$$\alpha = \left( \frac{k}{k-1} \right) \left( 1 - \frac{\sum_{i=1}^k \delta_i^2}{\delta_t^2} \right) \quad (1)$$

where:

$k$ —number of items (statements).

$\delta_i^2$ —variance of the  $i$ -th item.

$\delta_t^2$ —total variance.

When selecting test items to be measured, it is helpful to estimate the discriminatory power of individual items in the form of sentences on which respondents express their opinion. The discriminatory power is estimated based on the value of the biserial correlation coefficient between a given statement (item of the tool) and the overall result. However, a necessary condition is to reduce multicategory scales (e.g., Likert scale) to two-category scales.

This can be done using the Edwards–Kilpatrick rule [93,94], which takes into account the rating values of 27% of respondents ( $n_0$ ) who gave the lowest ratings ( $M_0$ ) and 27% of respondents ( $n_1$ ) who gave the highest ratings ( $M_1$ ). The results should be substituted into the formula for the value of the biserial correlation coefficient  $r_b$  in Formula (2) [95]:

$$r_b = \frac{M_1 - M_0}{s_n} \sqrt{\frac{n_1 n_0}{n^2}} \quad (2)$$

where:

$M_1$ —average value of the dichotomized variable in the first group, consisting of  $n_1$  respondents (where the answers above the line have a value of 0, and the answers below the line have a value of 1).

$M_0$ —average value of the dichotomized variable in the second group, consisting of  $n_0$  respondents (where the answers above the line have a value of 0, and the answers below the line have a value of 1).

$s_n$ —standard deviation from all answers provided.

$n$ —total number of responses ( $n = 70$ ).

The discriminatory power is sufficient when the biserial correlation reaches a value of at least 0.4.

A review of the literature on cultural heritage and cultural identity related to heritage made it possible to identify several basic statements that could describe the social value of cultural heritage. Therefore, the authors propose eight preliminary items for the measurement tool to develop a tool for the quantification of the social value of cultural heritage. These include the following issues, presented in Table 1, in the form of slogans and short justification.

**Table 1.** Assessment test results before correction.

Issues Used in Construct Assessment	Comments or Description	Literature References
Protection and presentation of local art	The act of making cultural heritage available may result in the value deriving from its protection, giving hope for its transmission to future generations and the popularization of local heritage through presentation to a wide group of tourists interested in this heritage	[41,50,66,87]
Organization of tourist traffic so that the industrial heritage is preserved	Tourist traffic and its organization may be of value to society and may also enable heritage protection while having a positive impact on the local economy	[1,26,30,49,96,97]
Promotion of historical industrial heritage	Social value may consist of education and meeting cognitive needs thanks to the promotion of industrial heritage to residents and tourists	[1,2,7,13,43,52,56,97]
Revitalization of post-industrial areas	Social value may entail the effects of revitalization processes of areas with cultural heritage (in this case, industrial heritage)	[12,13,34,44,50]
Natural environment preservation	The development of cultural heritage organizations can have a positive impact on the protection of the natural environment	[12,43,49,57,96]
Involvement/activation of the local community	Providing access to cultural heritage can increase the involvement and professional activation of the local community	[1,9,30,45,61,67,68,70,78,83,97]
Diversification of economic potential	Carrying out activities related to the provision of cultural heritage may diversify the economic potential of the region, increasing it with tourist activities	[3,10,15,16,20,26,30,66,86,96,97]
Acting as a symbol of the area	Social value may result from the creation of a tourist brand of the region thanks to the cultural heritage tourism product and a favorable image of the destination having cultural heritage facilities on its territory	[17,20,32,64,65,67,69,98]

Source: Based on own research.

However, it is necessary to select a group of experts who will enable the preparation of an initial version of the construct assessment tool. The authors decided that the group of experts should include people directly related to post-industrial heritage. This narrowing of the scientific problem resulted from the wide scope of cultural heritage. To achieve this goal, managers of post-industrial tourism facilities were selected as experts in the research, specialists whose competences in the field of cultural heritage enabled them to take up managerial positions in these facilities and take responsibility for facilities that are valuable from both a cultural and touristic perspective.

It is worth mentioning, however, that the issues raised concern tangible cultural heritage. They were limited due to the specificity of the facilities in which research was conducted to validate the research tool. Verification of set of issues that constitute the

construct describing social value was carried out based on empirical data. The research was conducted in December 2021 and January 2022 on a group of managers of 70 industrial heritage sites associated with the European Route of Industrial Heritage (ERIH). Facility managers were invited to participate in the research as experts. They came from Germany, Spain, Great Britain, Poland, Sweden, Portugal, France, Norway, Italy, Luxembourg, Bulgaria, Finland, Slovenia, Croatia, the Czech Republic, Ireland, Ukraine, Austria, and Belgium. The research, in the form of interviews with experts, was carried out as part of the research work of the Department of Computer Science and Economics of the Silesian University of Technology, in turn part of the work of a team consisting of A.R. Szromek, K. Herman, and M. Naramski. They covered a wide range of issues related to post-industrial heritage tourism and shared artifacts. In this work, the discussion of research results is limited to the social value of cultural heritage (in this case, industrial heritage).

Each expert was asked to assess the validity of the statements mentioned in the assessment of social value on a Likert scale (from 1 to 5, where 1 was the lowest score and 5 the highest). On this basis, a tool for assessing social value was obtained on an average scale of 1–5.

#### 4. Results

The assessments of individual items of the social value assessment construct obtained in the study were analyzed, and the results are presented in Table 2. The results include the value of the Cronbach's alpha coefficient (when removed), i.e., the assessment of the reliability of the tool after removing subsequent items from the list. Table 1 also takes into account the discriminatory power and the level of significance of differences between the mean values of grades calculated according to the Edwards–Kilpatrick rule [93,94], i.e., the result of the Student's *t*-test for the average level of 27% of the lowest grades ( $M_0$ ) and 27% of the highest grades ( $M_1$ ). The Cronbach's alpha coefficient was also estimated for the construct including all eight items and supplemented with a standardized Cronbach's alpha coefficient.

**Table 2.** Assessment test results before correction.

Social Value Assessment	Cronbach's Alpha When Removed	Discriminatory Power ( $r_b$ )	Test <i>t</i>
Protection and presentation of local art	0.64	0.84	0.001
Organization of tourist traffic so that the industrial heritage is preserved	0.63	0.77	0.001
Promotion of historical industrial heritage	0.65	0.97	0.001
Revitalization of post-industrial areas	0.65	0.81	0.001
Natural environment preservation	0.69	0.82	0.001
Involvement/activation of the local community	0.60	0.77	0.001
Diversification of economic potential	0.63	0.73	0.001
Acting as a symbol of the area	0.64	0.90	0.001

Source: Based on own research.

It should be noted that, while the level of significance of the differences between the mean results of  $M_0$  and  $M_1$  is very clear ( $p < 0.001$ ), the discriminatory power shows some variability. However, it should be noted that all values are greater than 0.4, which allows us to conclude that each item has adequate discriminatory power. However, while Cronbach's alpha values are above the 0.6 level, they are all lower than 0.7.

By reducing the set items in accordance with the criterion of the highest Cronbach's alpha value, the 'Natural environment preservation' item was removed. The resulting set of seven items allowed for improvement of the tool reliability results. Cronbach's alpha

approached the level of 0.7, and the standardized Cronbach's alpha exceeded 0.7. Further analyses also showed the possibility of omitting the item 'Revitalization of post-industrial areas', the removal of which would not reduce the reliability of the tool (Table 3).

**Table 3.** Assessment test results after correction.

Social Value Assessment (after Correction)	Cronbach's Alpha When Removed	Discriminatory Power ( $r_b$ )	Test $t$
Protection and presentation of local art	0.65	0.84	0.001
Organization of tourist traffic so that the industrial heritage is preserved	0.68	0.77	0.001
Promotion of historical industrial heritage	0.66	0.97	0.001
Revitalization of post-industrial areas	0.69	0.81	0.001
Involvement/activation of the local community	0.60	0.77	0.001
Diversification of economic potential	0.65	0.73	0.001
Acting as a symbol of the area	0.65	0.90	0.001

Source: Based on own research.

As a result of the calculations, a 7-item tool for assessing the social value of cultural heritage, provided in the form of a tourist product, was obtained. The reliability of the tool was estimated at 0.69 and its standardized rating at 0.71. The social value of cultural heritage, in the opinion of experts, achieved an average rating of 4.06 (on a scale from 1 to 5), while, by considering the 6-item version of the tool, the average rating was 4.10.

The results of the descriptive analysis for the entire set of tool ratings are presented in Table 4.

**Table 4.** The results of the assessment of individual test items and the total result of the assessment of the social value of cultural heritage.

Assessment Test Item	$n$	Average	Standard Deviation	Median	Coefficient of Variation	Min	Max
Protection and presentation of local art	70	3.57	1.03	4	28.83	1	5
Organization of tourist traffic so that the industrial heritage is preserved	70	4.07	0.94	4	23.03	1	5
Promotion of historical industrial heritage	70	4.57	0.53	5	11.52	3	5
Revitalization of post-industrial areas	70	3.79	1.02	4	26.94	1	5
Natural environment preservation	70	3.66	1.08	4	29.40	1	5
Involvement/activation of the local community	70	4.00	0.80	4	19.96	2	5
Diversification of economic potential	70	3.97	0.93	4	23.47	1	5
Acting as a symbol of the area	70	4.43	0.69	5	15.65	3	5

Source: Based on own research.

## 5. Discussion

As B. McKercher and H. Du Cros [26] indicate, virtually every introductory text on tourism contains at least one chapter discussing the social, cultural, and environmental

impacts of tourism. These dimensions very accurately discuss the problems and achievements of tourism in various contexts. This time, the attention was focused on the social value of cultural heritage.

The results of the conducted analyses indicate the validity of using both a seven- and six-element set of statements describing the examined issue. The issue of beneficial impact on environmental protection was eliminated from the eight-element set, as it was found to reduce the reliability of the assessment tool. In the opinion of experts, the aspect classified as 'Natural environmental preservation' is of lower importance for the assessment of the social value of cultural heritage related to industrial heritage.

Similar conclusions can be drawn from the ratings given to the statement related to the benefits of 'Revitalization of post-industrial areas'. It seems that this factor is overestimated due to the fact that the experts were representatives of industrial heritage objects in Europe, but, as calculations show, its removal from the set of factors does not reduce the reliability of the tool; therefore, it seems reasonable to use it only in situations where only industrial heritage will be assessed. However, in the case of the analysis of cultural heritage in general, a six-element set of assessment issues can be used.

In the summary of quantitative results for the given statements, it can be seen that some of them obtained an average result significantly exceeding the average score. These include the statements 'Promotion of historical industrial heritage' ( $4.57 \pm 0.53$ ) and 'Acting as a symbol of the area' ( $4.43 \pm 0.69$ ). Also worth noting is the low level of standard deviation of the ratings for these statements, which indicates the homogeneity of the assigned marks. In the opinion of experts, these two aspects essentially describe the social value of cultural heritage with respect to the local community. The social value of cultural heritage is expressed primarily in the ability to promote the historical heritage of the area, becoming, at the same time, its symbol and the main element of the tourist brand of the tourist reception area.

This issue can also be analyzed with respect to assessments of other values derived from cultural heritage, including the value for tourists and the value captured by heritage sites. The results of such a comparison were previously published [1], although on a different scale ( $-2-2$ ). The authors revealed that social value was rated the highest among all three value categories and transformed the obtained results to a scale of 1–5. It is worth noting that the social value was assigned a value of 3.5, while the economic value (captured by the facility providing access to the heritage) was assigned a value of 3.37 and the value proposed to tourists was assigned a value of 3.26. Therefore, there are slight differences between the assessments of individual value groups; however, the social value was dominant in this case.

In many cases, the value resulting from sharing cultural heritage is limited by problems resulting from changes in the economic function of the area. This is particularly difficult for the local communities living in these areas and involves many sacrifices. Tourism, especially mass tourism, may also have negative effects on maintaining cultural identity [9]. This happens when major changes are introduced, such as the displacement of local people. Tourism affects cultural identification through globalization processes. The reason for this state of affairs is not only the development of the media, but also the fact that operators of tourist services are trying to introduce different standards, recognizing that the services offered may be poorly suited to the needs of tourists [71,99].

Tourist traffic is also an important factor limiting the social value resulting from sharing cultural heritage. This is confirmed by the literature on the subject. N.U. Sekhar [96] recalls that tourism is often seen as an environmentally friendly way of revitalizing vulnerable rural communities and economies. It seems, however, that the opinions of representatives of areas experiencing mass tourism are not so optimistic. C. Agaliotou [97] notes that tourism, in particular mass tourism, may also be responsible for the degradation of cultural tourism. The example of the expansion of mass tourism in Greece shows the degradation of the natural and cultural environment, which is sometimes irreversible and entails many negative effects. The solution to this problem is seen in the adoption of a structured and

systematic development strategy for special and alternative forms of tourism. As you can see, heritage tourism can be a rescue not only for areas subject to deindustrialization, but also for areas degraded by mass tourism.

Also S. Halder and R. Sarda [64] emphasize the double benefits of heritage tourism, i.e., boosting the economy and encouraging sustainable development. They see an opportunity for the development of areas in the implementation of a promotion strategy that combines tourism-related, cultural, and natural values to capture the value for society. They base their observations on the potential for geoeducation, geotourism, and geoconservation of the local community and geoheritage sites in selected areas of India. Their conclusions indicate the need to strengthen such zones and the need for an individual approach to facilities, as well as the need to improve management efficiency to increase the number of domestic and foreign tourists.

It is also worth noting that cultural heritage can contribute to the economic and social development of a touristic destination, but the value of the destination brand and the way of promoting and strengthening the brand capital of the touristic destination are also important. Interesting research in this area is described by S. del Barrio-Garcia and M.B. Prados-Peña [65], who used a sample of 217 tourists visiting the Monumental Complex of Alhambra and Generalife in Spain. They developed an experimental design to determine (1) the extent to which the level of authenticity of a brand extension contributes to the brand equity of that extension and (2) whether this effect is due to tourists' perceptions of the credibility of the brand extension. The experiment involved manipulating the degree of authenticity of the brand extension. As a result, both the direct impact of brand extension authenticity on brand equity and the indirect impact provided by brand extension credibility were revealed.

Research on the use of social media to build the brand of a tourism-related product can also be cited here. M.B. Prados-Peña et al. [98] conducted research to determine how the use of promotional discounts and free gifts on social media contributes to the construction of the brand value of cultural heritage. It turns out that a free gift offered to customers recorded higher values in terms of awareness, perceived quality, and brand image than a discount. Promotional discounts have a stronger impact when the customer shows a high willingness to promote sales.

M.T. Signes-Pont et al. [100] note that heritage tourism can be an important factor in countering the outflow of inhabitants from small villages to cities. The authors see an opportunity to recover stone artifacts and transform them into a cultural tourism product, attracting new tourists and then new villagers.

The development of heritage tourism may also be related to the immigration of the population. M. Pretes [101] stresses that heritage sites, representing a nation's past, are an important element in the construction of national identity and help create a common identity within a diverse population, especially in areas consisting of many immigrant cultures. Objects representing the cultural heritage of a particular nation help build an imaginary community, even if it no longer exists or has been significantly mixed with other cultures. In connection with the intensifying migration of people associated with economic motives or the escape from war zones, it can be expected that tourists will become more interested in this form of compensation with respect to their longing for a deserted country or region.

It should also be remembered that the diversity of cultural identities in a given area can be an asset and even a factor in the development of tourism in this area. Such experiences are sometimes observed despite the presence of multiculturalism in the destination community. An example of what can connect different cultures is, for example, a common gastronomic heritage [59]. Thus, there are premises to claim that, despite the development of tourism, both cultural identity and heritage can be preserved. This can be achieved thanks to organizational solutions aimed at integrating the local community. Another integrating activity may be showing the economic benefits resulting from the conducted touristic activity with the use of cultural heritage and local culture. However, it can also be an

awareness of other values that are shared by multiple cultures, and can thus promote the integration of multicultural and multigenerational communities.

An underestimated aspect of the topic is intangible heritage, the importance of which, with respect to the construction of cultural identity, may be even greater than the importance of tangible heritage. Although in this case the value is even more difficult to measure than in the case of material heritage, it is impossible to abandon this activity in the research process. Intangible cultural heritage requires taking into account much broader diagnostic tools, as it has a much stronger impact on tourists' emotions. This, however, may strengthen the consolidation of cultural identity more than any physical connection to tangible cultural heritage. In this situation, it seems reasonable to focus further research on this aspect of cultural heritage.

## 6. Conclusions

The aim of this article was to identify issues that can be used to measure the social value resulting from cultural heritage made available in the form of a tourism-related product. Referring to the literature that describes these issues and the methodology necessary for the creation of tests for the assessment of social phenomena, six basic statements were specified that enable the assessment of the social value of cultural heritage. Issues that may serve as items in the social value assessment test include aspects such as the protection and presentation of local art, the organization of tourism and its consequences, making historical heritage available to a wide range of recipients, but also the activation and involvement of the local population, expanding the potential of the local economy to include touristic activities and creating a brand for the region or city thanks to the symbolism with which the presented cultural heritage is identified.

The developed construct covering the abovementioned issues that can build social value through cultural heritage tourism is only a starting point in the discussion on the measurement tool. The weakness of the tool is undoubtedly its high subjectivity, resulting from the selection of issues. Although this process was based on a review of the literature on this topic, the authors obviously relied only on the literature that was available to them. However, the main advantage of this process is the attempt itself to initiate it and indicate that it is possible to develop tools for measuring even complex phenomena such as social value.

Although it was stated that as a result of using the developed measurement tool the social value of the post-industrial tourism heritage in Europe should be assigned a value of 4.06 on a 5-point Likert scale, it is important to use the same or adjusted tool in other measurements. Consequently, this will enable the improvement of construct measurement tools and the comparison of the obtained results.

Theoretical implications arising from the research presented here concern how to measure the phenomenon of social value resulting from tangible heritage tourism, while practical implications concern the fact that the tool can be used to compare social values generated in different areas (destinations). Like any study, this one also has some limitations, which have already been partially mentioned. It should be added, however, that a significant strengthening of the presented concept of measuring social value would result from its supplementation with tools to measure other values based on a similar methodology.

Future research should first address the remaining value constructs. It should take into account both the material context and intangible values. In the second step, the developed tools should be used across various destinations where heritage tourism occurs. Such research would allow for comparison of the generated values, and thus increase measurement precision thanks to the generation of larger data sets. An interesting solution may also be the use of artificial intelligence to identify optimal connections and proportions in generating value.

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