

Strategic approaches to rural tourism and sustainable development of rural areas

Strategické přístupy ve venkovské turistice a udržitelný rozvoj venkova

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Abstract: The paper describes the role of rural tourism for the sustainable development of rural areas and stresses out the importance of strategic approach in the planning of their development. The author identifies core problems, which eliminate their use and disable individual strategies set by some entrepreneurs in rural tourism. Concretely it is the absence of developing projects and focus on the development of individual villages. Then it is the lack of will to cooperate, local resources are not effectively used and the local community is not adequately involved.

Key words: sustainable development, rural areas, rural tourism, strategic plan, marketing

Abstrakt: Příspěvek se zabývá posouzením role venkovské turistiky v rámci udržitelného rozvoje venkovských regionů a poukazuje na nezbytnost strategických přístupů při zabezpečení jejich rozvoje. Analýzou strategických dokumentů a na základě výzkumného šetření jsou identifikovány základní problémy, které omezují jejich využití a znesnadňují uplatnění strategií jednotlivých podnikatelů ve venkovské turistice. Jde zejména o absenci skutečně rozvojových projektů a soustředění se na rozvoj jednotlivých obcí, chybí vůle ke spolupráci, nejsou efektivně využívány místní zdroje ani dostatečně aktivizována lokální komunita.

Klíčová slova: udržitelný rozvoj, venkov, venkovská turistika, strategický plán, marketing

One of the important features of modern society is focus on sustainable development. As described by the commission of Gro Harlem Brundtland, sustainable development can be seen as meeting our needs without threatening the needs of future generations. Sustainable development is based on three pillars: sustainable economic growth, social growth and environment protection. Focus on sustainable development is, however, different for municipalities and the so-called "open space" areas, which can be rural areas.

In many countries, rural areas are less developed areas which have many specific problems. This is also the case in the Czech Republic, where rural areas have been out of the general public interest for many years. This resulted in an undesired situation of Czech farmers (in particular the small ones), high unemployment rate, shortage of finance and legislative support, which would promote business investments and new job creation (<http://www.mze.cz>). The situation has

changed after the EU entry. The EU member states in general want to increase the quality of life, clear or mitigate regional disparity and keep sustainable development in rural areas (<http://www.mmr.cz>). The whole process is planned and managed. Goals for the development of a region are set on productivity and competitiveness with the use of proactive, planned and strategic realisation. Strategic development of rural areas is one of the basic tasks of municipality managers. Strategic planning is therefore the main tool for the social-economic development. The plan is a key document and there are many issues that positively or negatively influence such strategic plan.

Besides strategic planning, extremely important is the support of small and medium size enterprises as well as the possibility of networking of such entrepreneurs. The individual regions, towns and municipalities compete among themselves in attracting economic subjects. They create and stabilize new jobs and by this they influence prosperity and living

standard of regions' or municipalities' inhabitants. Such subjects can be also entrepreneurs in tourism. Tourism in rural areas is a very important factor, which can positively influence regional development. Tourism, however, must be supported and conditions for its positive development have to be created. One way to make rural regions more attractive and help solving problems of agriculture businesses are various forms of rural tourism. That is an alternative way of agricultural business which may be useful to return to profitability, increase in competitiveness of agriculture and new job creation (http://www.mmr.cz/upload/files/cestovni_ruch). Due to this, links in the management of public administration – its strategic management and strategies of individual entrepreneurs in rural tourism – are very important.

LITERATURE REVIEW

Definition of rural regions and rural tourism

The definition of rural areas is a much discussed issue. The roots of this discussion can be found as back as in the 19th century when first mentioned in 1929 Sorokin and Zimmerman in their "Principles of Rural Urban Sociology" (Sorokin, Zimmerman 1929). The authors bring more than 200 indicators of rural areas and set out to discover the differences between the rural and urban worlds. Pahl (1968) in his paper "The Rural-Urban Continuum" suggests that an exact definition of rural areas may be very difficult.

All this indicates that to define rural areas is very complicated. The current literature shows that rural areas, or rural population, respectively, can be defined in various ways. It may be the official document of the EU the "Proposal for a Council Regulation on support to Rural Development by the European Agricultural Fund for Rural Development" which identifies local areas (municipalities) as rural if the population density is below 150 inhabitants per 1 square kilometre (<http://ec.europa.eu/agriculture>). This definition has proven to be useful in making international comparisons of rural conditions and trends. At the regional level, (NUTS 3) the OECD distinguishes:

- **Predominantly rural regions:** over 50% of the population lives in rural communes (with less than 150 inhabitants/km²).
- **Significantly rural regions:** 15 to 50% of the population living in rural communes.
- **Predominantly urban regions:** less than 15% of the population living in rural communes.

After the EU entry, we use indicators commonly used by the OECD and the Eurostat (Majerová et al. 2002).

- First indicator is the population density per km², which for rural villages was decreased from max 150 inhabitants/km² (OECD) to the level used by the Eurostat, which is 100 inhabitants per km².
- Second indicator is the number of inhabitants living in villages with population of less than 100 people per km².

Based on the above mentioned methodology, rural area, or rural population, are defined as an area, or population, of local communities/municipalities, with density of less than 100 inhabitants per 1 square kilometre. As of 1 January 2001, the rural area of the Czech Republic at the NUTS 3 level (kraj) consisted of all the country with the exception of Prague and the North Moravian region and covered 92.3% area of the Czech Republic. Rural area at the NUTS 4 level (okres) consisted of 64 regions (okres). There were 66.5% inhabitants living in the area, and it covered 90.9% of the Czech Republic. The total number of economically active inhabitants accounted to 45.1%. Rural area of the Czech Republic at the NUTS 5 level (obec) accounted to 79.2% of all communities and represented some 75% of the country area. There were 22.5% of all inhabitants living in there. The real social-economic problems of rural area are visible only at the NUTS 5 level (Majerová et al. 2002).

To determine what countryside is, different criteria can be used, from the simplest one to more complex ones like economic features or combination of factors characterizing particular types of municipalities or rural regions. For example Perlín (1998) defined various types of Czech rural regions: *suburban zone, rural areas in rich agricultural regions, north (rich) Sudety, south (poor) Sudety, upcountry periphery and Moravia-Slovak frontier*. Each parameter used for the evaluation of conditions has its advantages and disadvantages, which limit the use of the parameter. The most often used criterion in the Czech Republic is the number of inhabitants – a municipality is considered to be rural if it has less than 2000 inhabitants.

Similar to the definition of rural area it is also the idea of rural development, which is often discussed in literature for many decades. It may be the rigid understanding of how rural areas should look like and what roles they should have. Rural areas were perceived as the source of national heritage, culture and an essential part of national symbols. Today, we look at rural areas from a much broader perspective. Rural areas are places for living, recreational areas, cultural and natural space. It is part of nature and has

many economic, ecologic and social functions. On the other hand, rural areas are perceived as problematic issues of modernization, transformation of agriculture, increasing unemployment. The differentiation of rural areas and cities is seen in broadening of income and employment opportunities.

Discussion on rural development often leads to the question of the role of agriculture. Its place is often questioned by saying that agriculture is not able to provide economic stability of rural areas (Van der Ploeg 2000). Therefore, the focus is directed to non-agricultural enterprise (for example enterprise in rural tourism or agro-tourism). In reality, this multifunctional perception of the agricultural sector means not only the preservation of landscape, forests, water and environment, but also the protection of rural areas as the place for life in the developed infrastructure and employment opportunities (<http://www.mmr.cz>).

But what exactly is rural tourism? Rural tourism is tourism which takes place in rural areas. According to Stříbrná (2005), rural tourism relates to low population, open space and locations with less than 10 000 inhabitants. Pourová (2002) defines rural tourism as the tourism evolving both outside recreation and tourism centres and outside of urban areas. Many authors are engaged in the problems of tourism and their segmentation. For example Librová (1994) classifies tourism into “soft” (or “alternative”) tourism and “hard” tourism. According to her, “soft” tourism, which is also rural tourism, tries for new social and ecological access to the host areas. Soft tourism takes sustainable development into consideration and is more ecological.

Rural tourism or agro-tourism becomes very popular especially in the economically developed countries. It is its economically and socially positive impact which allows farmers to gain additional financial sources and create new job positions for other local people. In fact, it is a very positive and ecological form of tourism. Unlike the uncontrolled, mass and purely commercial tourism, these leisure activities have a very low negative impact on the environment. Decentralisation of accommodation allows visitors to spread all over the region and provides good opportunities for individual activities. Very often such activities are specialised, followed by other cultural additional programmes. This allows improvement of the quality and attractiveness of such service, or stabilisation of the targeted group. Such additional programmes include horse riding (hippo-tourism), cycling-tourism, hunting or fishing. All these just fill the gaps in local services which would not be otherwise provided (Šimková 2006).

GOALS AND METHODOLOGY

The author assumes that meeting customer's demands in the current business environment is more and more difficult. It is also very demanding. Prior to setting up a rural tourism oriented business, it is advisable to cautiously analyse the general policy of the region. It is necessary to react to the changes of consumer behaviour, such as increasing demand habits and orientation to goods and services that are not really necessary.

The goal of this article is to set the procedure of the analysis of the rural tourism potential, and stress out the necessity of utilisation of the effective planning and marketing approach as a key aspect in rural tourism entrepreneurship. The article also demonstrates core problems upon the analysis of the strategic documents of the rural community development (rural tourism development problems are usually included here). These core problems limit their future usage and they can also result in barriers to successful implementation of the individual strategic plans of local entrepreneurs in rural tourism.

The analysis of rural tourism and the main strategic business rules are based upon the information from a large number of literatures and practical experience of the author. She analysed strategic documents and gathered a lot of information. Further information was gained from the research performed at the beginning of 2007 through an electronic questionnaire sent to the mayors of municipalities in Hradec Kralove region. The analysed sample consisted of 28 respondents. The questionnaire was made of 13 questions to the composition of strategic documents and their practical realization.

RESULTS AND DISCUSSION

Rural tourism is a business activity as any other. Nevertheless, if the rural tourism is supposed to eliminate the mentioned problems of rural areas (and support their sustainable development), it should regularly match the requirements of the sustainability in respect of social economic approach (<http://www.epa.gov>).

Sustainable development of a region can be seen as:

- *quality of life*, which is living standard, public transport, infrastructure, public services,
- *prosperous economy*,
- *responsibility to the environment*.

Social economy is based upon cooperation, solidarity and relation of the local stakeholders. It supports

local wealth by creating new jobs and helps to the development of social capital.

For this reason, it is very important to analyse or rather cautiously scrutinise the potential of the whole region and its individual spots. It is the only way of mapping the potential of rural tourism.

Procedures for the analysis of the potential of rural tourism

It has been generally accepted that there are good conditions for further development in rural areas covering some 80% of state area (<http://www.mmr.cz>). It could be easily derived that rural tourism can be provided in any rural area. Nevertheless, the investment requirements (such as accommodation capacities, leisure capacities, as well as other infrastructure), place attractiveness and organisational requirements differ one area from another. For this reason, it is necessary to recognise financial and other sources and to define the effective forms of their particular use. The recommended analysis that can be used is the following (Šimková 2004):

I. Evaluation of the place appropriateness for rural tourism.

- Demographic, social and economic features, community plans and stakeholder expectations.
- Analysis of the area potential (natural resources, cultural resources, public resources and services, possible risky areas and environment conditions).
- Analysis of the current state (attractiveness, size of non-urban areas, ecology-oriented responsibility of inhabitants, cultural wealth and experience, access to financial resources, availability of qualified workforce, eco-behaviour).
- Evaluation of organisations and institutions which support tourism.
- Current problems and obstacles to tourism.

II. Analysis of business and local specific risks in relation to rural tourism

- Existing risks must be perceived at two levels. At the first level, any business risk can also become a business opportunity, and any lost opportunity can be viewed as damage. At the second level, all risks represent some degree of business uncertainty. Risk analysis must therefore be performed with systematic approach. The CATWOE (Checkland, Scholes 1999) methodology can be useful, of course with respect to rural tourism requirements:
Customer is the user of rural tourism.
Actor is the provider of rural tourism service.

Transformation describes the ways of how inputs change to outputs.

Worldview – the kind of experience and pleasure rural tourism provides.

Owner is the one who can decide on whether or not to continue in service providing.

Environmental constraints – impacts of rural tourism on the environment stability, requirements on infrastructure.

III. Trend description

- Evaluation of sustainability indicators of the place (economic prosperity, health a life quality, wellness, environment conditions, ...).
- Trends in rural tourism within the EU and their impact on rural tourism in the CR.

IV. Attractiveness of the locality for rural tourism from the view of the investor as well as users.

V. Selection of the right place for rural tourism.

VI. Infrastructure requirements for rural tourism (questionnaires).

VII. Financial sources and ways of financing of rural tourism (EU funds availability).

VIII. Marketing strategy (potential target groups of customers, PR and different ways of presentation).

Strategic plans and marketing in rural tourism

As any other business activity, also rural tourism is profit-oriented. Nevertheless, because it is driven by the accountability principles, rural tourism should be based not only on the core features of rural tourism (local biodiversity and eco-systems support, sustainable development), but also on understanding the lifestyle of the users of products and services of rural tourism (Moutinho 2000). This perception and understanding requires very good business planning including an environment impact assessment (environment friendliness, meeting environment management standards) with a strong focus on the following issues: technical (energy and waste), economics (costs and financial sources), social (ethics, responsibility to the environment), marketing (rural tourism presentation and communication with customers) and so on (<http://www.fao.org>). Good business plan must be strategically oriented and must effectively use marketing tools.

At the beginning of this chapter, common features of sustainability of a locality, and social-economics have been presented. This means that strategic plans of rural tourism business should respect the principles of sustainable development (Šimková 2003):

1. Sustainability oriented use of local resources.

2. Responsible and ethical approach towards the artificial and natural environment (the quality of which should not decrease in the long term, but should rather improve).
3. Local benefits should be planned way ahead with respect on the long-term sustainability.
4. Stakeholders (local communities, public authorities, NGOs, business partners, customers) should be informed on their relations and influence on the environment.
5. There should be some limits defined for the locality – capacity limits (number of tourists), biological (impact of visitors on the environment), psychological (environment quality and “feeling” of visitors) and social limits (number of visitors and the impact on the lifestyle of the local community) ...

Strategic plans then lead to a situation analysis of the locality and community, and feasibility of the project. It should be focused on four elements:

- I. **Current situation** (“Situation of the community and place”)
 - Description of the community, “stocktaking” of the locality, analysis of the locality.
 - Requirements on environmental regulation.
 - Historical development in the land use.
- II. **Trend description** (“Where the community is heading”).
 - Sustainability indicators development (economic prosperity, wealth and quality of life).
- III. **Community development plans** (“Where it should be getting to”).
 - Definition of its vision.
 - Indicator setting.
 - Sources and ways of financing.
- IV. **Realisation** (“How the vision will be achieved”).
 - Analysis of cost, benefits and risks (Cost-Benefit Analysis).

Benefits of rural tourism can be seen from the following criteria (Šimková 2006):

Economic (new job creation, source of capital, housing renovation, entrepreneurship stimuli, ... – overall increases competitiveness of the area).

Social (public service improvement, revitalization of folklore and local traditions – increases life quality in the region, both for local inhabitants and tourists, without dramatic changes of the local people lifestyle and general attitude).

Environmental (increasing the overall environmental knowledge of visitors and local people, increasing use of natural, cultural and historical potential, improvement of stability and biodiversity of the environment).

Costs relating to rural tourism development: infrastructure, energy, waste collection costs.

Risks of tourism: environmental damages (damages caused by visitors – soil, water and air pollution, flora and fauna devastation, damages of historical subjects, risk related to waste liquidation, ...), social-cultural changes of the region (lifestyle changes).

All human activities, which also include rural tourism, have impact on the environment. It is therefore necessary to use tools and procedures for the assessment of such environmental impacts – so called “EA (Environmental Assessment) procedures” (<http://ec.europa.eu/environment/eia>). These are: EIA (Environmental Impact Assessment), SEAN (Strategic Environmental Impact Analysis) and SEA (Strategic Environmental Impact Assessment), which can be used at different levels of management (Figure 1).

It is the complexity of the world which has shown that the “EA procedures” have an indisputable role. However, these are rather reactive (react to what already happened), while we need a proactive approach. Quite naturally it is advisable to include the “EA procedures” into a much wider framework such as risk management, where environmental risk assessment is one part. By focusing on risk analysis, we can get results that are in line with sustainability

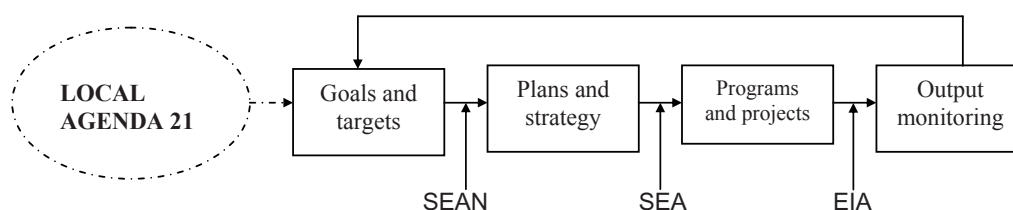


Figure 1. Use of EA procedures at different levels of management

Note: Local Agenda 21 is a program to be used for the sustainability development at local or regional levels (<http://ucr.uhk.cz>). It is based on the requirements of strategic approach to the development and balanced representation of all its aspects – economic, social and environmental friendliness .

trends and risk management is one part of project management. In this way, risk issues are evaluated in much wider context.

Business plan of rural tourism based business should be built on the knowledge of the lifestyle and needs of clients. No doubt, rural tourism should be based on sustainable tourism. Marketing should be therefore driven by environmental rules such as environmental compatibility and environmental impact minimisation (Moutinho, Evans 1992). This will therefore change the whole marketing plan because besides standard marketing activities (marketing research and marketing communication), it should also include an assessment of locality, products and services provided:

- **Marketing research** (analyses market profile of rural tourism, lifestyle of potential customers, their motivation and reasons of the selection of rural tourism).
- **Marketing analysis** (analysis of locality in relation to target group of customers).
- **SWOT analysis of the locality** (through which we should find out whether the selected community and locality bear features of “green community” as it is described in the documents of the US agency for the environment EPA (Environment Protection Agency (<http://www.epa.gov>)).
- **Analysis of products and services** (Life Cycle Assessment).

As soon as the marketing plan is done, financial and marketing strategies can be defined, including business strategy. That is focused on communication with stakeholders and awareness sharing of the locality. To some extent, these can also contribute to environmental education.

Strategic plan as a tool for rural areas development

Strategic development and social economics require an open and sensitive political system (<http://www.fao.org>). On one side, there is a businessman with his business plan, on the other, strategic plans of the municipalities as one of the key documents of the socio-economic development of the relevant region. The aim of most regional strategies is to identify main trends of development of micro re-

gions. However, the real use of the documents is much more limited, which can result in barriers to successful implementation of the individual strategic plans of local entrepreneurs in rural tourism. It shows the results gained from the analysis of strategic documents and in research through an electronic questionnaire sent to mayors of municipalities in the Hradec Kralove region.

The following can be concluded:

- Almost all villages have strategic plans.
- Most of them are expert based.
- Strategic focus is often missing (documents are not often used to implement the micro-regional development, but mainly as instruments for receiving financial support).
- They are often economically oriented (social and environmental issues are missing).
- Activities of the main focus often lead to repairing the existing burdens, not to new investments leading to social cohesion.
- Activities are often locally based; only rarely villages cooperate together.
- Very often they do not meet one of the basic features of strategic planning, which is the use of local resources and local community.

Solving the discrepancy between the number of regional strategies and their significance for development lies in the change of orientation of strategic documents into actual development projects, which are leading to a stable and a long-term development of the whole definite territory. It requires the strategic plans to be oriented also on the usage of three basic sorts of capitals in rural areas – social, cultural and environmental capital¹ (Hubík 2004). Such projects are aimed at the support of the local economic and business base, at employment increase of the definite territory and at the increase of micro regional identity through strengthening the significant elements of local culture and history.

CONCLUSION

If we want rural areas to be sustainable, they must have the appropriate financial sources and revenues. That, however, requires employment opportunities not only in the agriculture sector. These opportunities

¹ Social capital represents the relations of social clientele and the protection dependent on other types of capital or on the individual's status. Cultural capital represents education, skills, memory and their materialized forms. Environmental capital represents the immobile, namely natural, resources. If there is capital of the three mentioned types in an available form, it may be traded in the market of goods, services and symbols (Terluin 2001).

must be relevant to the specific features of the region or municipality, as described in the article. Sustainable development is based on the idea of "Think globally and act locally". The surveys present deficiencies which indicate that the real use of the documents is much more limited. Individual activities are predominantly dependent on the personal will of politicians. That means focus on development-based activities, cooperation, and maximal use of local resources, including local community. Strategic documents of rural micro-regions should have a wide reach; should be used as tools for discussion about the main problems and solutions, should reflect strategies of local entrepreneurs. It is the only way to realize the strategies of individual entrepreneurs, as well as entrepreneurs in rural tourism.

Even though it may be true that rural tourism is not as economically attractive as most of other sectors, in the end it contributes to the protection of demographic structure of rural areas and supports the specific cultural heritage and environment. The question whether it is only financial resources needed and the income gathered from job availability comes up. Next and equally important sources are social capital, social network. These relate to cooperation and relation among people. Economic benefits alone are not the strategic asset of rural areas, but it is rather the hope for the "romantic" side of life. Nevertheless, within strategic development of rural areas, it is necessary to have in mind small enterprises and to support them in their innovativeness.

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