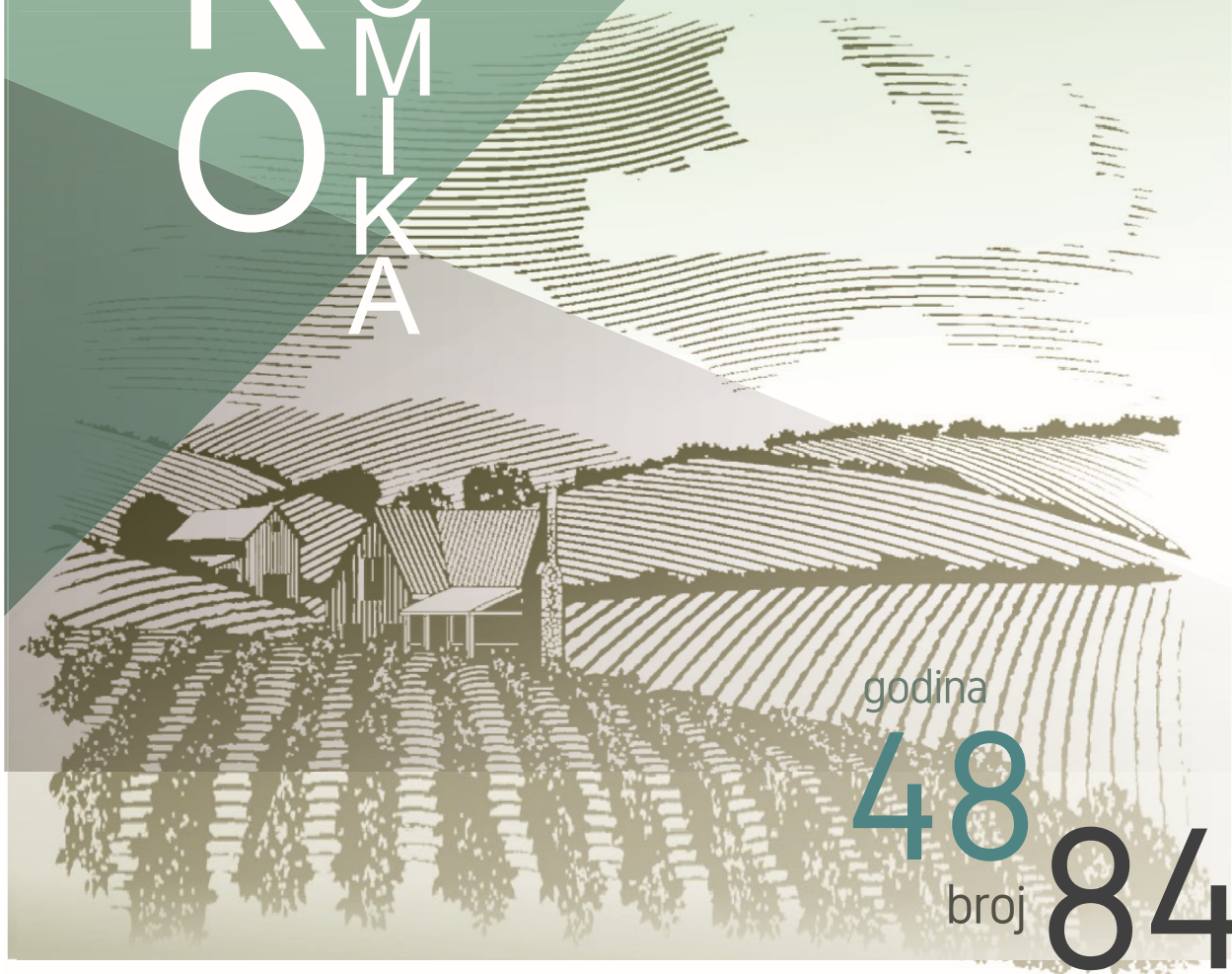


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Tel: 021 458 138, 021 48 95 233, Fax: 021 63 50 822.

Web: <https://agroekonomika.rs>

Email: redakcija@agroekonomika.rs

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EVALUATION METHODS FOR SUSTAINABLE RURAL TOURISM DEVELOPMENT: ISSUES TO BE ADDRESSED

Aleksandra Terzić¹, Biljana Petrevska²,
Marko D. Petrović³

Summary

There are different evaluation models and methods applied in tourism studies. More recently, the evaluation models of tourism potentials and sustainable tourism assessment involved many different sets of indicators that have been developed and applied in practice. Still, there is no universal list of indicators capable of revealing neither tourism potential nor exact sustainability level that can be applied to various destinations. Multi-criteria models combined with different statistical or geo-spatial aspects are also suggested. Rural destinations have shown to be specific in terms of sensitivity and the general importance of local community aspects. Therefore, we will focus on multi-criteria models and tourism development issues related to rural destinations. The evaluation of several rural destinations within Serbia will be conducted to address the risks and potentials for further development and local community active participation in the process.

Key words: evaluation, models, indicators, rural tourism, sustainable development

¹ Aleksandra Terzić, PhD, Research Associate, Geographical institute „Jovan Cvijić“ SASA, Đure Jakšića 9, Belgrade, Serbia, email: a.terzic@gi.sanu.ac.rs

² Biljana Petrevska, PhD, Associate Professor, Faculty of Tourism and Business Logistics, Goce Delcev University – Stip, North Macedonia, email: biljana.petrevska@ugd.edu.mk

³ Marko D. Petrović, PhD, Research Associate, Geographical institute „Jovan Cvijić“ SASA, Đure Jakšića 9, Belgrade, Serbia, email: m.petrovic@gi.sanu.ac.rs

PROCENA METODA ZA RAZVOJ ODRŽIVOG RURALNOG TURIZMA – PITANJA KOJA TREBA REŠITI

Aleksandra Terzić¹, Biljana Petrevska²,
Marko D. Petrović³

Rezime

Postoje različiti modeli i metode procene vrednosti koji se koriste u turističkoj praksi. U skorije vreme modeli procene turističkih potencijala i ocena održivosti turističkih destinacija uključuju sve veći broj različitih indikatora koji se kontinuirano razvijaju i primenjuju u praksi. Ipak, još uvek ne postoji ni jedna univerzalna lista indikatora koja je sposobna da otkrije konkretan turistički potencijal tako ni nivo održivosti koji bi bio primenjiv na različite vrste turističkih destinacija. Više-kriterijumski modeli kombinovani sa različitim statističkim ili geo-prostornim aspektima destinacija se takođe sugerišu. Ruralne destinacije su se pokazale kao umnogome specifične, posebno zbog svoje osetljivosti i opšteg značaja uključivanja aspekata koji se tiču lokalnih zajednica. Dakle, fokusiraćemo se na multi-kriterijumske modele i pitanja turističkog razvoja ruralnih destinacija. Sprovedena je i ocena nekoliko odabranih ruralnih destinacija u Srbiji, kako bi se ukazalo na određene rizike i potencijale za budući turistički razvoj ovih destinacija i ulogu i značaj aktivnog učešća lokalnih zajednica u ovom procesu.

Ključne reči: procena, modeli, indikatori, ruralni turizam, održivi razvoj

¹ Aleksandra Terzić, naučni saradnik, Geografski institut „Jovan Cvijić“ SASA, Đure Jakšića 9, Beograd, Srbija, email: a.terzic@gi.sanu.ac.rs

² Biljana Petrevska, vanredni profesor, Fakultet za turizam i poslovnu logistiku, Univerzitet Goce Delcev – Stip, Severna Makedonija, email: biljana.petrevska@ugd.edu.mk

³ Marko D. Petrović, naučni saradnik, Geografski institut „Jovan Cvijić“ SASA, Đure Jakšića 9, Beograd, Srbija, email: m.petrovic@gi.sanu.ac.rs

1 Introduction

In rural destinations, the specific importance of attractive natural environment, traditional ambient and cultural values of the countryside are inextricably bound to the role of the human factor – the local community. According to Garrod et al., (2004 and 2006) and Jaszczak and Žukovskis (2011) rural tourism development employs different attractive features of the countryside, such as: landscape, biodiversity and wildlife, agricultural buildings, rural settlements, historical features (buildings, monuments), tracks, trails, lanes and roads, water and air quality, cultural assets as distinctive local customs, crafts, festivals, ways of life, food and all other possible resources used for attracting tourists and providing them with satisfying experiences.

The rural (territorial) capital refers to the area's assets (activities, landscape, heritage, know-how, etc.), which are used to identify the distinctive features of an area whose value can be enhanced (Bogdanov & Janković, 2013). As such, various elements of countryside capital can be thought of as essential components of the asset base of rural tourism, which in addition to other factors, such as good infrastructure, amenable facilities, availability of information, hospitality, service quality, and customer care, determines the quality of the rural tourism experience. However, not all above-mentioned features have equal importance in the tourism value chain. As Lee et al., (2010) states tourist attractions (natural and cultural resources) are the most important dimension contributing to the attractiveness of the tourism destinations, followed by accessibility and amenities (lodging and catering services, information), while complementary services seem to be less important in most tourism destinations. Usually, within the tourism development perspective, the evaluation of internal and external assets that are of importance for the establishment of the tourism business is the first step in the planning process.

2 Multi-criteria methods for tourism evaluation process

Among many other assessment tools, indicators related to sustainability are believed to be relatively reliable, clear, simple and (Asmelash & Kumar, 2019). Even though stakeholder involvement in the indicator development process is needed, the number of necessary indicators is still left open. According to the World Tourism Organization (WTO) (2004:8), "indicators are measures of the existence or severity of current issues, signals of upcoming situations or problems, measures

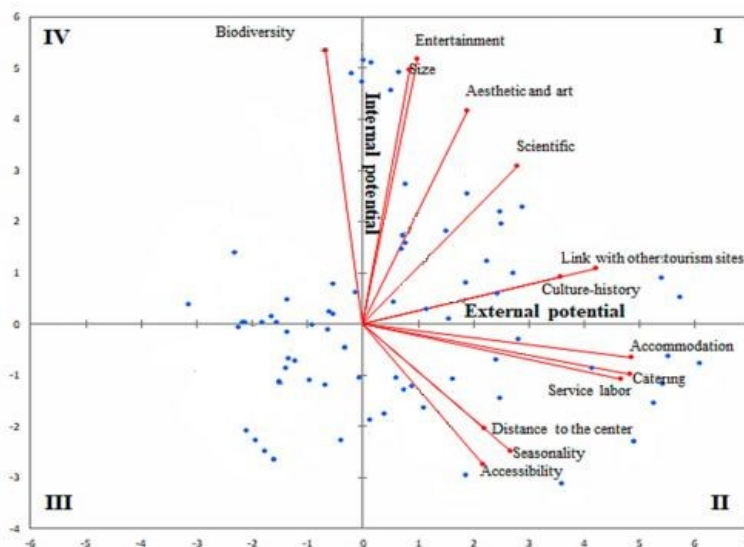
of risk and the potential need for action, and means to identify and measure the results of our actions.” There are different methods applied and suggested, but most of them are based on multi-criteria evaluation systems (WTO, 2004; Du Cross, 2001; Sánchez, et al., 2013; Hoang et al., 2018; Mahdavi et al., 2013; Asmelash & Kumar, 2019). Still, there is no universal list of sustainability indicators capable of revealing the sustainability level nor tourism development potential of various destinations (Asmelash & Kumar, 2019). Most past studies related to the determination of tourism potential and sustainability aspects focused on economic or environmental dimension only, or, more recently, on three universal aspects of sustainability (economic, socio-cultural and environmental).

Defined standards considering preconditions for agricultural tourism development such as EuroGites (European Federation of Rural Tourism) standards for accommodation units in rural areas. Those are also based on multiple criteria, and grouped into five clusters: equipment, surroundings, services at the accommodation and its surroundings, non-material aspects and security (Petrović et al., 2016). Besides, EuroGites criteria allow basic evaluation of accommodation and service quality standards, giving specific importance to a local traditional style of architecture, authenticity and conservation level of surroundings (rural ambiance with natural and cultural resources and high state of conservation). Along with a basic evaluation of tourism’s contribution to local development/production, environmental, social and cultural responsibility, perceived reception, hospitality, qualifications, and information availability tend to be of high importance, as well as issues of perceived safety and security.

Furthermore, WTO sustainable tourism development indicators (2004) cover: wellbeing of host communities, sustaining cultural assets, community participation in tourism, tourist satisfaction, health and safety issues, economic benefits from tourism, protection of valuable natural assets, managing scarce natural resources, limiting impacts of tourism activities, controlling tourist activities and levels, destination planning and control, designing products and services, sustainability of tourism services. Even though such standards are dedicated to quality control in rural tourism, they can also serve as a valuable tool in the definition of indicators related to rural tourism development potentials and sustainability aspects.

2.1. Models of evaluation of tourism potentials

As Hoang et al. (2018) suggest, tourism potential depends on both endowed and established resources, which are reflected in the internal and external tourism potential. The authors use 13 criteria for creating evaluation system. While 7 criteria are related to the internal tourism potential (aesthetic and artistic value, entertainment value, cultural-historical value, scientific value, biodiversity, the size of tourism destination, and tourism seasonality), the other 6 criteria (related to infrastructure and services, links with other tourist sites, accessibility, the distance from tourist attractions to the center, accommodation quality, catering quality, and service labor quality) are used for evaluating external tourism potential (Hoang et al., 2018).



Source: Hoang et al., 2018.

Graph 1. Evaluation model of internal and external tourism potential

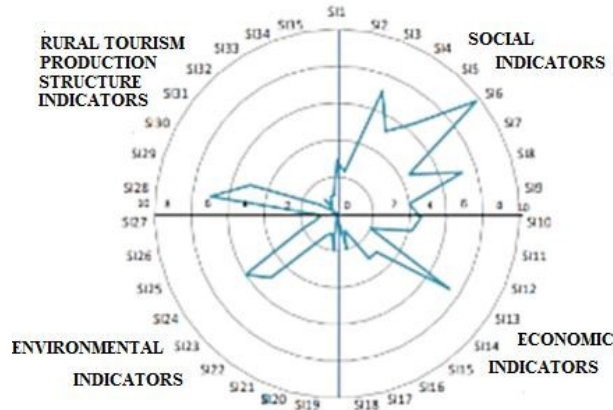
Graf 1. Model ocene internog i eksternog turističkog potencijala

Such economic-related models often underappreciate the importance of local community issues in the development process. Recent studies related to the rural tourism development potentials indicate slightly different models. Mahdavi et al. (2013) recommended the AMOEBA model structured in four main groups of indicators: social, economic, environmental and rural tourism production structure (Graph 2).

The method used for the estimation of the territorial capital of rural regions in Serbia (Bogdanov & Janković, 2013) partly resembles the AMOEBA model, including the extended list of indicators: human capital – personal abilities/skills and entrepreneurial potential; social capital – community organizational capacities; economic capital – the

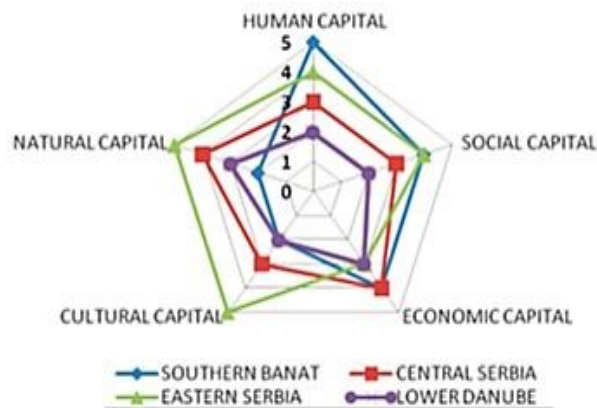
extent and quality of resources and sources of income; cultural capital and natural capital (Graph 3).

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Source: Mahdavi et al., 2013

Graph 2. Model of rural tourism sustainability assessment
 Graf 2. Model ocene održivosti ruralnog turizma



Source: Bogdanov & Janković, 2013.

Graph 3. Estimation of the territorial capital of the analyzed regions in Serbia
 Graf 3. Procena teritorijalnog kapitala u posmatranim regionima Srbije

Such models have the potential to indicate some differences in the rural capital of different regions, allowing proper insights and proposing different strategic approaches in the development process. However, such evaluation models more or less lack in issues addressing the local community aspects, usually ignoring issues such as: employment possibilities, additional income sources, potential for engaging local workforce, slowing migration and depopulation processes, creation of markets for agricultural and organic products, gastronomy and crafts, providing welfare and satisfaction within local communities and hospitality issues, considered to be the key aspects of sustainable tourism in rural spaces (Trukhachev, 2015). Therefore, Trukhachev (2015)

suggests the evaluation model based on six groups of factors: (i) Economic factors (effective demand, potential labor force, development of agricultural production, development of rural households and subsidiary farming), (ii) Demographic factors (population distribution, share of rural population, number of urban agglomeration in the region, system and network of rural settlements, location and proximity to urban agglomeration), (iii) Environmental factors (natural resources, climate, landscape), (iv) Cultural factors (monuments, history, identity, traditions), (v) Infrastructural factors (transport accessibility, tourist and recreation infrastructure), (vi) Psychological factors (interest in rural tourism and recreation among local population, hospitality).

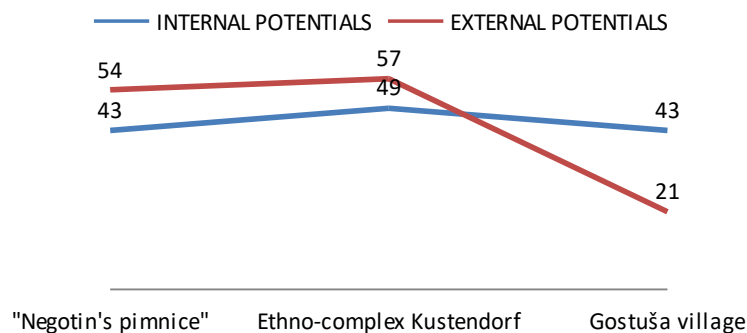
A very important issue in the tourism development process is achieving long-term sustainability. Basically, sustainable development of tourism principles considers three interdependent levels: (i) Destination sustainability (resource management and preservation, as well as infrastructure), (ii) Tourism sustainability (quality of tourist experiences and market appeal and (iii) Sustainability of local community (community participation in tourism) (Xiang & Wall, 2005; Terzic et al., 2015). However, recent studies show that there is a specific addition to be included in the construct of sustainability indicators, and further indicate four identified groups: (i) Economic sustainability (employment, viability, local prosperity), (ii) Environmental sustainability (physical integrity, diversity, resource efficiency, environmental purity), (iii) Socio-cultural sustainability (social equity, cultural richness, community wellbeing, local control, visitor satisfaction), (iv) Institutional sustainability (local planning policy, local-oriented control policy, political participation, political support). Furthermore, additional remarks have to address infrastructure and technological sustainability issues as well (Asmelash & Kumar, 2019).

2.2. Evaluation of tourism potentials of selected villages in Serbia

As found by Bogdanov and Janković (2013), the structure of territorial capital in rural regions of Serbia showed that it is possible to identify different potentials and obstacles for the development of rural tourism in the studied regions based on the selected indicators. Therefore, it is necessary to create different territorial policies of regional rural development, based on the detailed examination of these indicators in the planning process. The existence of inter-regional and intra-regional disparities indicates that it is even more important to use the extended list of such indicators on a local (municipal) level, prior to the establishment of tourism development models and plans. It is possible

that there can be significant differences between two geographically close villages relying on the same or very similar territorial capital. The endogenous development approach outlines that specific resources of rural areas (natural, human and cultural) hold the key to its sustainable development, while the main dynamic force is represented by local initiative and enterprise. On the other hand, main problems are mostly related to the limited capacity of areas and social groups to participate in economic and development activity. Therefore, they experience certain social exclusion (Bogdanov & Janković, 2013:8).

The evaluation of internal and external potentials of selected rural tourism destinations in Serbia was conducted on: the ethno-complex "Negotin's pimnice" containing several wine-villages in the surroundings of Rajac, Rogljevo, Štubik and Smedovac villages near Negotin; the ethno-complex "Kustendorf" (Drvengrad) within village of Mokra Gora, as a representation of a modern rural tourist resort; and the authentic village of Gostuša (with specific stone-roof houses) located on the Balkan mountain range in the municipality of Pirot (Graph 4).

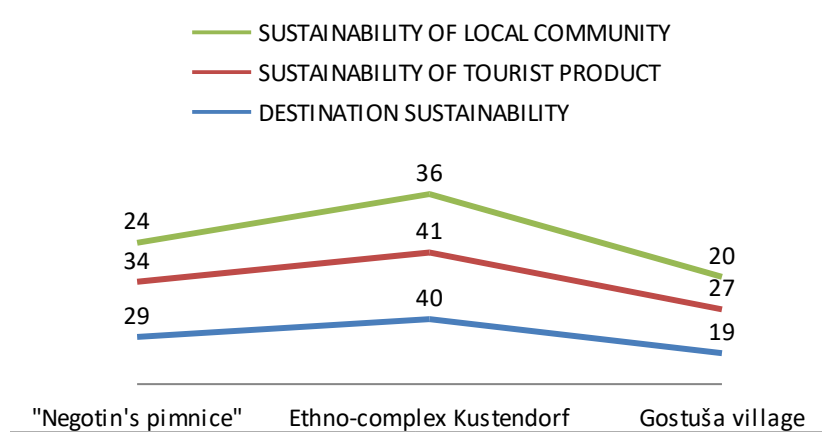


Source: Author's calculations

Graph 4. Evaluation of internal and external potentials of selected rural destinations in Serbia

Graf 4. Procena internih i eksternih potencijala odabranih ruralnih destinacija u Srbiji

The next step in the evaluation process should be the assessment of sustainability aspects for each defined rural destination, using the suggested model by Terzić (2015), presented in Graph 5. The results show that the sustainability of local communities is the greatest issue that needs to be addressed and properly solved in all evaluated rural destinations in Serbia.



Source: Author's calculations

Graph 5. Sustainability aspects of rural tourist destinations in Serbia
Graf 5. Aspekti održivosti ruralnih turističkih destinacija u Srbiji

In particular, the ethno-complex "Kunsterdorf" got the best mark in this section because it is a private-owned complex that provides employment for locals and enables small-scale hand-made local products sales and marketing. It supports different events and the protection of natural resources in the area as well. The other two destinations are national cultural resources managed and protected by the government, and therefore are in a rather poor state, dependent on the will and economic strength of locals to preserve and manage tourism in these mostly depopulated areas of Serbia. Moreover, other state laws reduce the possibilities for maintenance and use of such heritage sites by local communities, due to very strict rules and procedures.

Such results show that both models indicate the lack of infrastructure and management practices at observed destinations in Serbia. Also, the direct participation of the local communities in the decision-making process is missing. Considering an in-depth analysis of potentials and possible obstacles in the development process, a more detailed perspective is provided by the sustainability assessment approach compared to other models. Unfortunately, very often, sustainability aspects interconnected to the local community participation are neglected or underappreciated (Terzic et al., 2015). This should be avoided at all costs, as rural tourism's main goal is to be developed by and for local communities, and as such provide their future and sustainability.

Conclusions **3**

The sustainable tourism development cycle provides the creation of an attractive tourism value chain and economic prosperity, by ensuring environmental and cultural integrity and social welfare for local communities (Xiang & Wall, 2005). Scholars agree that, if implemented based on sustainable principles, rural tourism can use the village space, rural capital, and existing infrastructure in a rational way (Jaszczak, 2010). Rural tourism should contribute to the well-being of both the natural environment and the rural communities in which it is established. This can be achieved by taking precautions to conserve the rural heritage, biodiversity, landscapes and the local culture (Mahdavi, Parishan & Hasar, 2013). The physical state of heritage resources is in direct relation to the participation levels and economic power of locals. Heritage assets that are respected, used and managed by locals, have a better chance to be restored, protected and used for tourism purposes. The sustainability of cultural and natural resources is impossible to achieve without direct participation of local communities (with granted institutional support).

Good management and consolidation of interests in rural tourism can make a positive contribution to the rural economy and community. They also ensure a positive direction of regional development. Governmental institutions are slowly becoming aware that they are not able to guarantee sustainable policies for rural spaces without building partnerships between the public and private sectors with civil society. Establishing partnerships and providing citizen's involvement in the decision-making process is considered to be the only way towards a successful development process.

The complex multi-criteria methods and indicator evaluation systems tend to be more comprehensive development assessment methods compared to traditional ones. Tourism sustainability assessment of individual destinations allows pointing to their real market potential, with a clear indication of benefits and disadvantages, risks and opportunities of the existing value chain. However, these indicators are quite similar in various models and interrelated with different geospatial, socio-economic and demographic parameters. These need to be more integrated, closely investigated and further combined. It must be also noted that tourism development potential is conditioned by various socio-economic determinants (number of residents, active population, age and sex issues, education levels, economic stability – income sources,

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dominant occupations, etc.). In particular, when considering rural spaces for tourism development, the focus must be on the needs of local communities, their role and levels of involvement in the development process, as well as on providing prosperity and wellbeing of local communities.

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