

KAUNAS UNIVERSITY OF TECHNOLOGY  
KLAIPĖDA UNIVERSITY  
LITHUANIAN ENERGY INSTITUTE

KRISTINA BARKAUSKIENĖ

**IDENTIFICATION AND EVALUATION OF THE FACTORS OF  
RURAL TOURISM DEVELOPMENT IN LITHUANIA**

Summary of Doctoral Dissertation  
Social Sciences, Economics (04S)

2017, Kaunas

This doctoral dissertation was prepared at Kaunas University of Technology, School of Economics and Business, Department of Economics during the period of 2011–2017. The studies were supported by the Research Council of Lithuania.

**Scientific Supervisor:**

Prof. Dr. Vytautas SNIEŠKA (Kaunas University of Technology, Social Sciences, Economics, 04S).

**Editor:** Dovilė Dumbruskaitė (Publishing Office “Technologija”)  
Inga Nanaronytė (Publishing Office “Technologija”)

**Dissertation Defence Board of Economics Science Field:**

Prof. Dr. Daiva DUMČIUVIENĖ (Kaunas University of Technology, Social Sciences, Economics, 04S) – **chairwoman**;

Prof. Dr. Valentinas NAVICKAS (Kaunas University of Technology, Social Sciences, Economics, 04S);

Prof. Dr. Vaida PILINKIENĖ (Kaunas University of Technology, Social Sciences, Economics, 04S);

Prof. Dr. Ilona SKAČKAUSKIENĖ (Vilnius Gediminas Technical University, Social Sciences, Management, 03S);

Doc. Dr. Sergej VOJTOVIČ (A. Dubček University of Trenčín, Social Sciences, Management, 03S).

The official defence of the dissertation will be held at 11 a.m. on 31<sup>st</sup> August, 2017 at the public meeting of Dissertation Defence Board of Economics Science Field in Dissertation Defence Hall at Kaunas University of Technology.

Address: K. Donelaičio St. 73-403, 44249 Kaunas, Lithuania.

Tel. no. (+370) 37 300 042; fax. (+370) 37 324 144; e-mail [doktorantura@ktu.lt](mailto:doktorantura@ktu.lt).

Summary of doctoral dissertation was sent on 31<sup>st</sup> July, 2017.

The doctoral dissertation is available on the internet <http://ktu.edu> and at the libraries of Kaunas University of Technology (K. Donelaičio st. 20, 44239 Kaunas), Klaipėda University (K. Donelaičio a. 3, 92144 Klaipėda), Lithuanian Energy Institute (Breslaujos st. 3, 44403 Kaunas).

KAUNO TECHNOLOGIJOS UNIVERSITETAS  
KLAIPĖDOS UNIVERSITETAS  
LIETUVOS ENERGETIKOS INSTITUTAS

KRISTINA BARKAUSKIENĖ

**LIETUVOS KAIMO TURIZMO PLĖTROS VEIKSNIŲ  
NUSTATYMAS IR VERTINIMAS**

Daktaro disertacijos santrauka  
Socialiniai mokslai, ekonomika (04S)

2017, Kaunas

Disertacija rengta 2011–2017 metais Kauno technologijos universiteto Ekonomikos ir verslo fakulteto Ekonomikos katedroje. Mokslinius tyrimus rėmė Lietuvos mokslo taryba.

**Mokslinis vadovas:**

Prof. dr. Vytautas SNIEŠKA (Kauno technologijos universitetas, socialiniai mokslai, ekonomika, 04S).

**Anglų kalbos redaktorė:**

Dovilė Dumbruskaitė (leidykla „Technologija“)

**Lietuvių kalbos redaktorė:**

Inga Nanartonytė (leidykla „Technologija“)

**Ekonomikos mokslo krypties disertacijos gynimo taryba:**

Prof. dr. Daiva DUMČIUVIENĖ (Kauno technologijos universitetas, socialiniai mokslai, ekonomika, 04S) – **pirmininkė**;

Prof. dr. Valentinas NAVICKAS (Kauno technologijos universitetas, socialiniai mokslai, ekonomika, 04S);

Prof. dr. Vaida PILINKIENĖ (Kauno technologijos universitetas, socialiniai mokslai, ekonomika, 04S);

Prof. dr. Ilona SKAČKAUSKIENĖ (Vilniaus Gedimino technikos universitetas, socialiniai mokslai, vadyba, 03S);

Doc. dr. Sergej VOJTOVIČ (Trenčino Aleksandro Dubčeko universitetas, socialiniai mokslai, vadyba, 03S).

Disertacija bus ginama viešame Ekonomikos mokslo krypties disertacijos gynimo tarybos posėdyje 2017 m. rugpjūčio 31 d. 11:00 val. Kauno technologijos universiteto disertacijų gynimo salėje.

Adresas: K. Donelaičio g. 73-403, 44249 Kaunas, Lietuva.

Tel. + 370 37 300 042; faks. + 370 37 324 144; el. paštas [doktorantura@ktu.lt](mailto:doktorantura@ktu.lt).

Disertacijos santrauka išsiųsta 2017 m. liepos 31 d.

Su disertacija galima susipažinti interneto svetainėje <http://ktu.edu> ir Kauno technologijos universiteto (K. Donelaičio g. 20, 44239 Kaunas), Klaipėdos universiteto (K. Donelaičio a. 3, 92144 Klaipėda), ir Lietuvos energetikos instituto (Breslaujos g. 3, 44403 Kaunas) bibliotekose.

## INTRODUCTION

### Relevance of the study

Many countries around the world, including Lithuania, seek sustainable long-term economic development and favourable competitive position in the global market through the development of tourism, as it is the sector that has the potential for a country's economic growth. Tourism has a positive impact on the economic development of a country since it promotes cooperation between regions as well as small and medium-sized enterprises, creates new vacancies and increases income of a country (Barkauskienė and Barkauskas, 2012). What is more, the development of tourism promotes the development of other sectors, such as transport and food industry, construction, agriculture, and others. Tourism is an important economic activity which has a positive impact on both the national and global economic growth, and employment. During the First World Conference on the Development for Tourism held in 2016, Taleb Rifai, Secretary-General of the United Nations (UN) World Tourism Organization (WTO), stressed that tourism now accounts for 10% of world GDP, 7% of world exports, 30% of the export of services, and that one of eleven newly created job vacancies depends on the tourism industry. In addition, Secretary-General Taleb Rifai pointed out that the development of tourism not only promotes economic growth, but also strengthens mutual understanding and peace among the peoples, plays a leading role in improving environmental protection, creates jobs and opens up new opportunities. It is rural community that should be concerned with the development of tourism, which opens up new opportunities for the development of these communities (UNWTO, 2016). On the basis of the European Commission's report on rural development in the European Union, it can be noted that around 52% of Europe's territory is classified as rural, 38% as intermediate, and only 10% as urban. (European Commission, 2013).

Despite the fact that for more than a century the traditional assumption that the cost of living is higher in urban areas has prevailed, economic, social and political conditions of rural areas have changed under the influence of industrialization and urbanization. Rural change has been taking place all across Europe, including Lithuania. The number and composition of rural population, employment and lifestyle are changing. In this context, rural tourism is one of the greatest opportunities for potential growth and development of rural areas. The development of rural tourism not only provides opportunities to cope with new challenges faced in rural areas due to increasing agricultural, forestry, rural and regional competitiveness, but also promotes the diversification of economic activities in these areas. The user of rural tourism services begins to dedicate more importance to the quality of food, landscape, relaxation and rehabilitation opportunities, local culture, and traditions rather than services at the lowest price. Rural tourism as a service business located in rural areas is greatly influenced by the business environment. Business environment is changing rapidly, and

businesses seeking to remain competitive and continue to develop their activities must respond to changes in the environment: take advantage of the benefits of macro-environment and micro-environment and reduce their negative impact. Business environment has a significant impact on the success and potential of a service business. The objectives and strategies provided for the development of rural tourism should take into account business environment which opens opportunities, while also creating complex circumstances.

In Lithuania, the development of rural tourism started in the 1990s; however, it was not the development of a new activity. Farmsteads in Lithuania have been used for recreation since the beginning of the last century. Rural tourism, which is developed in the areas of natural landscape, has been dedicated greater and greater importance in recent years, however, the comparative weight of rural tourism services remains low within the scope of tourism services. In addition, according to the data of Statistics Lithuania (2017), in 2016, the number of tourists who rested in farmsteads was higher by 4.8% as compared to 2015, and only 9.3% of rural tourists were foreigners. It is foreign tourists who influence the emergence of new economic relations and attraction of investment, and raise the awareness of economic and social power in the country.

The ongoing economic integration processes in Lithuania and the development of international relations with the global countries affect the development of tourism (including rural tourism). Lithuania has a lot of opportunities for the development of rural tourism: favourable geographical position, beautiful nature, mild climate, cultural rural objects, architectural and historical monuments and hospitable people. All this creates excellent conditions for the development of rural tourism. Business environment in Lithuania is constantly changing. Both macro-environmental conditions and factors affecting the micro-environment are changing. This business environment as a condition for the development of rural tourism is not utilized enough in Lithuania, and by the development of rural tourism and the income therefrom, Lithuania significantly lags behind the leading countries in this field. The establishment of macro-environmental and micro-environmental factors favourable to the development of rural tourism is a necessary condition in order to increase the competitiveness of rural tourism and to envisage the prospects of rural tourism development.

In order to comprehensively evaluate factors which affect the development of rural tourism, conventional statistical instruments are not sufficient and additional indicators are necessary. It is necessary to identify, investigate and evaluate new methods which reflect the impact of macro-environmental and micro-environmental factors on the potential of rural tourism. Empirical evidence would enable a more objective evaluation of the significance of the impact of macro-environmental and micro-environmental factors on the potential of rural tourism. The relationship between business environment and factors of rural

tourism development would serve as more significant arguments than mere theoretical considerations.

### **Scientific problem and the level of its investigation**

The status of rural tourism, its significance to rural development and organization of rural tourism activities have been investigated from various perspectives by the following Lithuanian researchers: Astromskienė et al. (2007, 2012), Armaitienė et al. (1999), Hopenienė & Kamičaitytė (2004), Paulauskienė (2014), Ramanauskas & Gargasas (2011), Ramanauskienė & Vagonis (2010), Rukužiienė et al. (2007, 2008, 2009), Ramanauskienė et al. (2008), Vitkienė (2002), Žalienė & Sabaliauskaitė (2002) et al. Foreign researchers were also introduced: Bel et al. (2015), Darau et al. (2010), Garin-Munoz & Montero-Martin (2007), Gartner (1996), Hassan (2000), Hall et al. (2005, 2008), Maksimovič et al. (2015), Mehmetoglu (2007), Nair et al. (2015), Ogarlaci & Popa (2011), Saarinen & Lenao (2014), Sharpley & Roberts (2004), Silva & Lean (2015), Swarbrooke (1999), Tsephe & Eyono Obono (2013), Tribe et al. (2000).

The peculiarities and forms of rural tourism were analysed by Andriulienė et al. (2010), Gartner (1996), Hassan (2000), Hopenienė & Kamičaitytė (2004), Hall et al. (2005), Jaszczak & Žukovskis (2010), Ogarlaci & Popa (2011).

Aaker (2001), Andriuščenka (2003), Atkočiūnienė (2011), Bagdonienė & Hopenienė (2005), Kotler et al. (2003), Kreag (2001), Markauskienė & Gižienė (2012), Tosun (2002), Weaver & Lawton (2001), Tovar & Lockwood (2008) Aref & Redzuan (2010) investigated the economic and non-economic impact of tourism (including the impact of rural tourism) on development of regions.

Definitions of the process of rural tourism development were provided by Dapkus (2008), Dimitrovski et al. (2012), Gunn (1988), Lankford & Howard (1994), Ligeikienė (2003), Lomine (2007), Koa & Stewart (2002), Žalys et al. (2006).

The impact of macro-environmental factors on the development of rural tourism was analysed by Lithuanian and foreign scholars. The majority of scientific papers examine the impact of individual macro-environmental factor groups on the development of rural tourism. The impact of economic factors on rural tourism development as a sub-sector of national tourism was highlighted by Antonakis et al. (2015), Gargasas & Večerskas (2013), Jasinskas et al. (2014), Payne & Mervar (2010), Ramanauskienė et al. (2010), Rid et al. (2013), Singh et al. (2008), Snieška et al. (2014), Tang (2011), Tugcu (2013), Vijayakumar et al. (2010), Župerka & Župerkienė (2014), Šimkova (2006), Žalys et al. (2006), Botezat (2003), Ramanauskienė et al. (2010), Romikaitytė & Kisieliauskas (2012). The impact of political/legal factors on the development of rural tourism was analysed by Randelli et al. (2014), Rahmani et al. (2013), Maxton (2015), Ezeuduji (2015), Šimkova (2007), Žalys et al. (2006), Barbu (2013). The impact of natural/ecological factors on the development of rural tourism was particularly stressed by Ramanauskienė et al. (2010), Sinkienė (2008), De Freitas (2003),

Astromskienė & Andriūnas (2010), Romikaitytė & Kisieliauskas (2012), Li et al. (2016). Akbaba (2012), Astromskienė (2009), Bosma & Stam (2012), Mafunzwaini & Hugo (2005), Ramanauskas & Gargasas (2011), Ramanauskienė et al. (2010), Rid et al. (2013), Žilinskas & Maksimenko (2008), Sinkienė (2008) & Ivanauskaitė (2012) examined the impact of social/cultural factors. Technological factors affecting the development of rural tourism were analysed by Hall & Williams (2008), Lazauskas (2015), Li et al. (2016), Meschi et al. (2015), Hjalager (2002).

The impact of individual micro-environmental factor groups on the development of rural tourism was researched by Lithuanian and foreign scholars: the impact of a company's strategy and competition – by Stynes & O'Halloran (2004), Kotler et al. (2003), Labanauskaitė (2011), Žilinskas & Petravičienė (2007), Wilson et al. (2001), Marin et al. (2013); factors affecting the infrastructure – by Wilson et al. (2001), Zdorov (2004), Kotler et al. (2003), Middleton et al. (2009), Labanauskaitė (2011), Žilinskas & Petravičienė (2007); factors affecting the resources – by Stynes & O'Halloran (2004), Zdorov (2004), Boškovič et al. (2013), Žalys et al. (2006), Astromskienė et al. (2007), Mohl & Hagen (2010), Katsaitis (2009), Dimulescu (2013); Kadir & Sibel (2014) (2014), Žilinskas & Maksimenko (2008), Jasinskas et al. (2014); factors affecting the demand – by Rukužiienė (2008), Ramanauskienė et al. (2008, 2011), Pender & Sharpley (2005), Gražulis & Narkūnienė (2015), Brazaitytė & Ramanauskienė (2006); factors affecting related and supporting sectors were analysed by Andriulienė et al. (2010), Stynes & O'Halloran (2004), Vanagienė & Kriščiukienė (2014), Gudelytė et al. (2014), Hsieh & Lee (2012).

Despite the increasing emphasis on the development of rural tourism in scientific literature, so far there is no comprehensive analysis which identifies and evaluates the factors of the development of rural tourism. None of the researchers of this issue have provided a methodologically grounded model of interaction between the development of rural tourism and factors affecting it which would distinguish the main macro-environmental and micro-environmental factors and show their impact on the development of rural tourism.

**The problem of the thesis** – how to identify and evaluate the factors of rural tourism development.

**The object of the thesis** is the factors of rural tourism development.

**The aim of this doctoral thesis** is to develop a model of the factors of rural tourism development by identifying macro- and micro-environmental factors.

To achieve the aim, the following **tasks** have been set:

1. After analysing the peculiarities of the conception of rural tourism development and the aspects of rural tourism development, to revise the concepts of rural tourism and rural tourism development.
2. To identify and systemize macro- and micro-environmental factors that affect the development of rural tourism.



3. To formulate the methodological principles of the factors of rural tourism development.
4. To develop a model of the factors of rural tourism development
5. To verify the model of the factors of rural tourism development.
6. To carry out complex empirical research of the factors of rural tourism development.

**The methods of research include:**

- systematic and comparative analysis of conceptions and conclusions published in scientific literature, based on comparative, classification, systematization, and generalization methods;
- synthesis of the analysis results and logical generation of conclusions;
- expert evaluation;
- correlation analysis;
- analysis of secondary statistical data;
- Kruskal-Wallis test;
- mathematical and statistical analysis of research results using statistical data-processing programmes.

**Scientific novelty and potential areas of application:**

1. *The concepts of rural tourism and rural tourism development were revised.* According to the interpretations of the concepts of rural tourism in scientific literature, it can be argued that rural tourism is defined in different ways: as a phenomenon in scarcely-populated (rural) areas or as an activity in rural areas. Rural tourism is closely connected with the specificity of rural areas. It is developed in natural or artificial rustic environment, and combines natural and cultural heritage, and its essential component is local people and their lifestyle. In the doctoral thesis, *rural tourism* is defined as *a service business in the rural areas, which is oriented to the utilization of natural, cultural, social, human and financial resources, and has a positive impact on rural development, as it contributes to the formation of rural infrastructure, employment and income growth, as well as diversification of business in the rural area. The development of rural tourism is the process which manifests itself in the growth of the number of rural tourism businesses, services and trade, the growth of investment, the development of related industry sectors and increased employment in the rural area.*
2. *The factors of rural tourism development were analysed. The factors of rural tourism development were identified by macro-environmental and micro-environmental factor groups.* Five macro-environmental factor groups which show the impact of macro-environment on rural tourism as a sub-sector of national tourism were distinguished, i.e. economic, political/legal, natural/ecological, social/cultural and

technological factors. Five micro-environmental factor groups which show the impact of micro-environment on the development of rural tourism as a service business in the rural area were distinguished, i.e., a company's strategy and competition, infrastructure, resources, demand, and related and supporting sectors.

3. *Methodological principles of evaluating the factors of rural tourism development were formulated.* In order to identify and evaluate the factors of rural tourism development by obtaining as accurate and objective research data as possible and to draw conclusions on the basis of the obtained results, it is necessary to use qualitative and quantitative research. The use of expert evaluation was justified by the fact that is necessary to rely upon the knowledge, experience and intuition of experts in order to achieve a comprehensive understanding of the development of rural tourism. The use of quantitative research is subject to the fact that statistical substantiation of the impact of macro-environmental and micro-environmental factors on the development of rural tourism is necessary.
4. *The model of the factors of rural tourism development was developed by identifying macro-environmental and micro-environmental factors.* The developed model can be applied to identify and evaluate the factors affecting the development of rural tourism in different countries as well as for the analysis of their impact on rural tourism development with regard to macro-environmental and micro-environmental aspects of the analysed country. The model can be used to determine the possibilities for rural tourism development, as it identifies macro-environmental and micro-environmental factors which influence the development of rural tourism. The model distinguished factors which have an impact on the development of rural tourism as a sub-sector of national tourism and as a service business in a rural area. It leads decision-adopting organizations and representatives of tourism businesses to more objectively evaluate the impact of individual factors and the importance of individual business entities and their operational methods and the associated risks, and helps provide the measures of the promotion of rural tourism development.
5. *The model of the factors of rural tourism development was verified.* Research results confirmed the significance of the distinguished macro-environmental and micro-environmental factors to the development of rural tourism. The research enabled the identification of macro-environmental and micro-environmental factors, which, in the opinion of experts, have the greatest impact on the development of rural tourism. Based on research results, the model has been revised, verified and its practical applicability was confirmed.

6. *An empirical research of the link between rural tourism development in Lithuania and macro-environmental factors was carried out.* Research results showed that, in the opinion of the experts, there is a statistically significant relationship between economic stability, tax policy, and consumer purchasing power. These economic factors have the greatest impact on the development of rural tourism, and the components of rural tourism development: an increase of the number of rural tourism businesses, tourism services and trade, the growth of investment, the development of related industry sectors and increased employment in the rural area. A statistically significant relationship was also established between the components of rural tourism development in Lithuania, and cultural peculiarities and lifestyle (social/cultural factor) as well as the landscape (natural/ecological factor) and government-run tourism policy and foreign policy (political/legal factors) indicators. Strong correlational relationships suggest that there might be not only correlational but also functional relationships between rural tourism development in Lithuania and such macro-environmental factors as economic stability, tax policy, consumer purchasing power, cultural peculiarities and lifestyle, landscape, government-run tourism policy and foreign policy. Their nature was not analysed in the doctoral thesis. It is within the scope of further investigation.
7. *An empirical research of the link between rural tourism development in Lithuania and micro-environmental factors was carried out.* The research substantiated the relationship between micro-environmental factors and the development of rural tourism as a service business in a rural area. Based on research results, during the analysed period, the factors affecting business strategy and competition, i.e. strategic planning and foresight, and the level of openness had a significant impact on the development indicators of Lithuanian rural tourism companies as service business entities in the rural area. Among the factors affecting infrastructure, the development was mostly influenced by the infrastructure of communications. The factors affecting the demand, i.e. the price of services, new products and services, specialization of rural tourism companies had an impact on the results of the development of rural tourism companies. The factors of related and supporting sectors, i.e. strengthening of the relationship between companies engaged in tourism activities, cooperation with tourist information centres, and development of rural tourism clusters had a significant impact on the development of Lithuanian rural tourism. Positive micro-environmental changes which took place during the analysed period led to improving the development indicators of

Lithuanian rural tourism companies as service business entities in the rural area.

### **The structure of doctoral thesis**

This doctoral thesis consists of three parts (see Fig. 1). Based on the analysis of scientific literature, the first part analyses the peculiarities of rural tourism conception evolution and aspects of rural tourism development, and investigates macro-environmental and micro-environmental factors of rural tourism development. The second part formulates the methodology for identifying and evaluating the rural tourism development factors, which form the basis for the model of the factors of rural tourism development; the model was verified. The third part presents complex empirical research regarding the development of rural tourism in Lithuania and factors affecting it.

### **Research limitations**

This empirical research of rural tourism development and factors affecting it analysed only those macro-environmental and micro-environmental factors that, in the opinion of the experts, had the greatest impact on the development of rural tourism in Lithuania. The impact of macro-environmental factors on the development of rural tourism as a sub-sector of national tourism was based on correlational relationships. Functional relationships between the development of rural tourism in Lithuania and macro-environmental factors were not analysed.

The empirical research analysed only those relationships between the development of rural tourism companies as service business entities and the changes in micro-environmental factors that were proved to be statistically significant according to the Kruskal-Wallis test results.

The research was limited by the availability of some data. The starting dates of collection and submission of statistical indicators in the databases of Lithuania Statistics, State Department of Tourism, the Ministry of Environment of the Republic of Lithuania and the Ministry of Foreign Affairs of the Republic of Lithuania encompass different years.

### ***The contents of the dissertation***

The dissertation consists of 166 pages (149 pages aside from appendices), 30 figures, 36 tables, 8 appendices. 250 sources of scientific literature in Lithuanian and English were used as references.

### ***The publication of research results***

Research results have been presented at scientific conferences in Lithuania and abroad and published in recognized Lithuanian and foreign scientific journals.

# **1. THE DEVELOPMENT OF RURAL TOURISM AND FACTORS AFFECTING IT**

## **1.1. The evolution of the conception of rural tourism**

There is no generally accepted definition of rural tourism. Rural tourism is defined in different ways as farm tourism, agro-tourism, green or eco-tourism, sustainable tourism. These definitions reflect certain characteristics of the services provided and their specificities. The definition of rural tourism should be linked to the characteristics of locality, to the characterization of resources, the objectives pursued by the stakeholders, and to the reasons of rural tourism development. In this thesis, rural tourism is defined as a service business in the rural areas, which is oriented towards the utilization of natural, cultural, social, human and financial resources, and has a positive impact on rural development, as it contributes to the formation of rural infrastructure, employment and income growth, as well as diversification of business in the rural area.

## **1.2. Aspects of rural tourism development**

Rural tourism development is the process exposed to the changing social, economic and ecological conditions covering a lot of different economic activities and affecting the local community, the activity of regional sectors' and the country's economy. The changes and tendencies of rural tourism development as of every economic process depend on the pursued aims and objectives. In the context of economic growth theory, the most important result of rural tourism development is the rise of welfare of the population, achieved through the increase of investments, services and extent of consumption. In the thesis, the development of rural tourism is defined as the process which manifests itself in the growth of the number of rural tourism businesses, tourism services and trade, the growth of investment, the development of related industry sectors and increased employment in the rural area.

## **1.3. Factors affecting the development of rural tourism**

The changes and tendencies of rural tourism depend on the environment they occur in. Environmental factors affecting this process are divided into macro-environmental (external) and micro-environmental (internal) factors. In this thesis, five macro-environmental factor groups were identified, i.e., economic, political/legal, natural/ecological, social/cultural and technological factors affecting the process of rural tourism development. Macro-environment creates, on the one hand, the general conditions for the functioning of a rural tourism business, and determines legal, socio-economic, ecological limits for the activities of business, on the other. The most important micro-environmental factors affecting the process of rural development can be divided into five groups, i.e., company's strategy and competition, infrastructure, resources, demand, and

related and supporting sectors. Each of these groups consists of separate elements, the expression of which determines the development of rural tourism as a service business. The impact of micro-environmental factors directly relates to the influence of macro-environment to rural tourism development. The identification and evaluation of the factors affecting rural tourism development help to distinguish the essential environmental components, which have (might have) a significant impact on the results of the process.

## **2. A METHODOLOGY FOR IDENTIFYING AND EVALUATING THE FACTORS OF RURAL TOURISM DEVELOPMENT**

### **2.1. The model of rural tourism development factors**

In this sector, a model of factors of rural tourism development was developed by identifying the macro-environmental and micro-environmental factors and grouping them according to their nature of on the development of rural tourism (see Figure 1). In order to evaluate the development of rural tourism and factors affecting it, 10 factor groups comprising 53 factors (27 macro-environmental and 26 micro-environmental factors) were distinguished. In order to describe the macro-environmental and micro-environmental factors, 92 quantitative and qualitative criteria (58 for macro-environmental factors and 34 for micro-environmental factors) were distinguished. In order to describe the development of rural tourism, 10 criteria and their indicators were distinguished. The impact of macro-environmental factors occurs due to the development of total tourism, including rural tourism as a sub-sector of national tourism. Meanwhile, the impact of micro-environmental factors affects the development of rural tourism as a service business in the rural area. Macro-environmental factors directly and indirectly (through the micro-environmental factors) influence the development of rural tourism.

The identification and evaluation of rural tourism development is a complicated process which should include qualitative and quantitative criteria which characterize the identified factors. The evaluation of macro-environmental and micro-environmental factors is grounded on the impact to rural tourism development and on the determination of its aspects.

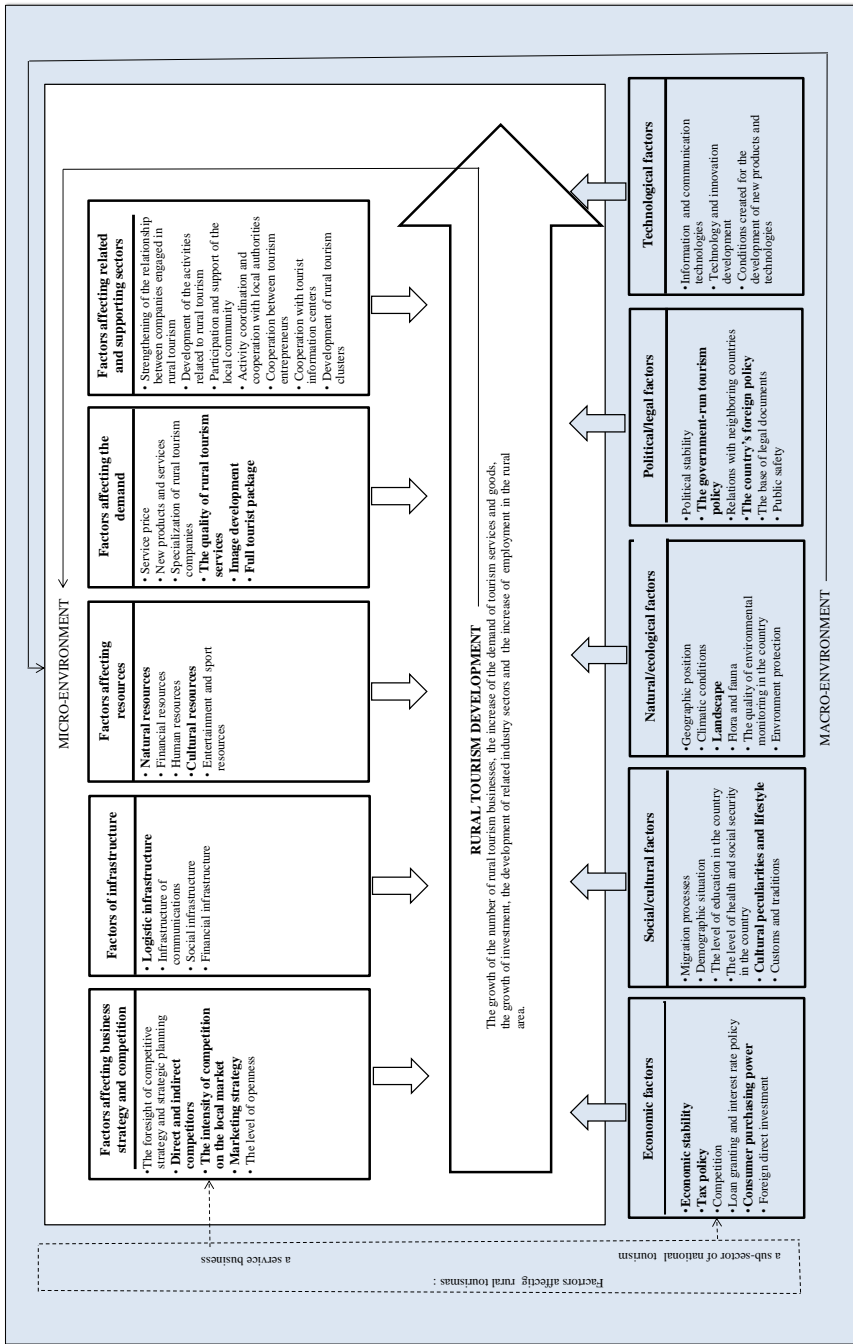


Fig.1 The model of rural tourism development factors

## **2.2. Verification of the model of rural tourism development factors**

In order to verify the model of factors of rural tourism development, experts evaluated the factors affecting rural tourism. The aim of this research was to identify the factors affecting rural tourism and to evaluate the significance of their impact. 29 experts, i.e., representatives of Lithuanian non-profit institutions, higher education institutions, governmental institutions and businesses took part in the survey from May until July in 2016. Experts were asked to identify macro-environmental and micro-environmental factors affecting the development of rural tourism and to evaluate their significance. They were interviewed with an individual survey questionnaire sent via e-mail or during a visit to the expert. The data have been processed and analysed using SPSS 17.0 software and Microsoft MS Excel 2010.

The results of expert evaluation confirmed that macro-environmental and micro-environmental factors identified in accordance with theoretical analysis affected the development of rural tourism. The following macro-environmental factors were analysed: economic factors – economic stability, competition, tax policy, loan granting and interest rate policy, consumer purchasing power; foreign direct investment; political/legal factors – political stability, the government-run tourism policy, relations with neighbouring countries, the country's foreign policy, the base of legal documents, public safety; natural/ecological factors – geographic position, climatic conditions, landscape, flora and fauna, the quality of environmental monitoring in the country, environment protection; social/cultural factors – migration processes, demographic situation, the level of education in the country, the level of health and social security in the country, cultural peculiarities and lifestyle, customs, and traditions; technological factors – information technology and communications, technology and innovation development, conditions created for the development of new products and technologies. Micro-environmental factors were also analysed: factors affecting business strategy and competition – the foresight of competitive strategy and strategic planning, direct and indirect competitors, the intensity of competition on the local market, marketing strategy, the level of openness; factors of infrastructure – logistic infrastructure, infrastructure of communications, social infrastructure, financial infrastructure; factors affecting resources – natural resources, financial resources, human resources, cultural resources, entertainment and sport resources; factors affecting the demand – new products and services, specialization of rural tourism companies, the quality of rural tourism services, image development, full tourist package; factors affecting related and supporting sectors – strengthening of the relationship between companies engaged in rural tourism, development of the activities related to rural tourism, participation and support of the local community, activity coordination and cooperation with local authorities, cooperation between tourism entrepreneurs, cooperation with tourist information



centres, development of rural tourism clusters. The impact of analysed micro-environmental factors was significant for the development of rural tourism as a service business in the rural area according to the results of expert evaluation. On the basis of criteria selected for the analysis (statistical indicators: median, interquartile range) and of the results of the non-parametric test, the most significant macro-environmental and micro-environmental factors for the development of Lithuanian rural tourism have been distinguished. The following macro-environmental factors were distinguished: economic factors – economic stability, tax policy and consumer purchasing power; political/legal factors – the government-run tourism policy and the country's foreign policy; landscape as the natural/ecological factor; social/cultural factor – cultural peculiarities and lifestyle, and landscape as the natural/ecological factor. The following micro-environmental factors were distinguished: factors affecting business strategy and competition – direct and indirect competitors, the intensity of competition on the local market and marketing strategy; the factor of infrastructure represented by logistic infrastructure; factors affecting resources – natural resources and cultural resources; factors affecting the demand – the quality of rural tourism services, image development and full tourist package. On the basis of this research, the model of rural tourism development factors was revised, highlighting the diverse significance of individual factors to the development of rural tourism (see Fig.1). The adjustment of the model made it possible to identify factors which, in the opinion of the experts, i.e. representatives of Lithuanian non-profit institutions, higher education institutions, governmental institutions and businesses, had the greatest impact on the development of rural tourism. The identification of these factors enables to foresee the opportunities of Lithuanian tourism development for both decision-making organizations and the representatives of rural tourism businesses.

### **3. THE DEVELOPMENT OF RURAL TOURISM IN LITHUANIA AND FACTORS AFFECTING IT**

#### **3.1. Analysis of the Lithuanian tourism situation**

The situation of rural tourism in Lithuania in the period of 2010–2016 was analysed. The natural and cultural resources, i.e. the diversity of cultural heritage, the Lithuanian countryside, a wealth of scenic lakes and rivers, more than one-third woodland territory of the country, traditions, ethnic festivals, historical museums and customs, traditional Lithuanian cuisine, folk festivals and a variety of nations living in the country increase the attractiveness of Lithuanian rural tourism. The improving economic situation, favourable natural and cultural environment, EU structural support and Lithuanian Government support made a positive impact on the development of rural tourism. The analysis of rural tourism situation in Lithuania in 2010–2016 has showed that the conditions for the development of rural tourism over the analysed period improved and the indicators

of rural tourism development of rural tourism indicators (the number of tourists, the number of overnight stays, the average price, average income for the accommodation, etc.) have changed in a positive way. However, the changes of individual indicators of rural tourism development were not notable. For more intense and efficient development of rural tourism, it is necessary for rural tourism businesses to be able to adapt to a constantly changing environment.

### **3.2. Methodology and organization of the empirical research of the development of rural tourism in Lithuania and factors affecting it**

Complex empirical research was used to analyse the development of rural tourism in Lithuania as well as the macro- and micro-environmental factors which affect it. The connections between the indicators of Lithuanian rural tourism development and the indicators of macro-environmental factors were analysed using statistical analysis of secondary data and correlation. The connection between indicators of development of Lithuanian rural tourism and indicators of micro-environmental factors were analysed using expert evaluation and the Kruskal-Wallis test. The data have been processed and analysed using SPSS 17.0 software and Microsoft MS Excel 2010.

### **3.3. Results of the empirical research of the development of rural tourism in Lithuania and factors affecting it**

This part of the thesis presents the results of analysis regarding the economic factors – economic stability, tax policy and consumer purchasing power; political/legal factors –the government-run tourism policy and the country’s foreign policy; natural/ecological factor i.e. landscape; social/cultural factor i.e. cultural peculiarities and lifestyle; natural/ecological factor i.e. landscape. The results of correlation have confirmed that the development of Lithuanian rural tourism was affected by the analysed macro-environmental factors during the period of 2010–2015. Research substantiated the relationship between micro-environmental factors and the development of rural tourism as a service business in the rural area. Based on research results, during the analysed period, the micro-environmental factors, i.e., strategic planning and foresight, and the level of openness, the infrastructure of communications the price of services, new products and services, specialization of rural tourism companies, strengthening of the relationship between the companies engaged in tourism activities, cooperation with tourist information centres, and the development of rural tourism clusters had a significant impact on the development indicators of Lithuanian rural tourism companies. Positive micro-environmental changes that took place led to improving development indicators of Lithuanian rural tourism companies as service business entities in the rural area, which was confirmed by the results of expert evaluation and the Kruskal-Wallis test.

### **3.4. Tendencies of rural tourism development in Lithuania and possibilities for the application of research**

The thesis also discusses the possibilities for the application of this research and the tendencies of rural tourism development in Lithuania based on the results of the research. The analysis of macro-environmental factors affecting the development of rural tourism provides an opportunity to identify the changes and trends from the viewpoint of their significance for the businesses. With an attitude of sustainable development of rural tourism, the tools and techniques that encourage the development of rural tourism could be provided which would help to avoid a negative impact on this process. In order to remain competitive, rural tourism companies must provide new solutions in their strategy and activities. Authorities and rural tourism businesses should make an effort to enhance the cooperation with local communities with an intention to develop local traditions and crafts in rural areas; this would create additional activities in rural areas and attract tourists. It is useful for rural tourism businesses to consider the factors affecting the tourism development process in order to adapt to a constantly changing environment; to take advantage of the opportunities and to avoid the emerging threats, as well as to provide business development prospects.

## **CONCLUSIONS**

On the basis of research carried out on the identification and evaluation of the factors of rural tourism development, the following conclusions of the doctoral thesis are drawn:

1. After analysing different theoretical approaches to the conception of rural tourism, its formative process and peculiarities, it was found that:
  - Rural tourism is a complex concept. The main (mandatory) services include accommodation and catering; additional services encompass tourist servicing; auxiliary (special) services are active and passive leisure and recreational services. Rural tourism is associated with the utilization of natural, cultural, social and economic resources seeking diversification of businesses in rural areas and a positive impact on rural development; it is perceived as a sub-sector of tourism, which is closely related to other types of tourism and has economic, environmental and social/cultural impact on both national economy and local community.
  - *Based on the theoretical analysis of the peculiarities of the development of rural tourism conception, the concept of rural tourism was revised. Rural tourism is defined as a service business in the rural area which is oriented to the utilization of natural, cultural, social, human and financial resources, and has a positive impact on rural development, as it contributes to the formation of rural infrastructure, employment and income growth, as well as diversification of business in the rural area.*

- The development of rural tourism is perceived as a process of quantitative change (growth) caused by the growing influx of tourists, which requires long-term investment and can be seen as the consequence of improving standards of tourist living and local community. Five main interest groups that influence rural tourism development were distinguished: local authorities, farmers, business representatives, rural community, and tourists. On the basis of scientific literature analysis, the development of rural tourism is also perceived as an improvement of rural tourism services in order to meet the growing needs of tourists, thus increasing the demand for services. *The doctoral thesis defines rural tourism as the process which manifests itself in the growth of the number of rural tourism businesses, tourism services and trade, the growth of investment, the development of related industry sectors and increased employment in the rural area.*
2. On the basis of scientific literature analysis, factors affecting the development of rural tourism were identified and systemized:
- *macro-environmental:* 1) *economic factors:* economic stability, competition, tax policy, loan granting and interest rate policy, consumer purchasing power; 2) *political/legal factors:* political stability, the government-run tourism policy, relations with neighbouring countries, the country's foreign policy, the base of legal documents, public safety; 3) *natural/ecological factors:* geographic position, climatic conditions, landscape, flora and fauna, the quality of environmental monitoring in the country; 4) *social/cultural factors:* migration processes, demographic situation, the level of education in the country, the level of health and social security in the country, cultural peculiarities and lifestyle, customs, and traditions; 5) *technological factors:* information technology and communication, technology and innovation development, conditions created for the development of new products and technologies. These five groups of factors affect the development of rural tourism as a sub-sector of national tourism.
  - *Micro-environmental:* 1) *factors affecting business strategy and competition:* the foresight of competitive strategy and strategic planning, direct and indirect competitors, the intensity of competition on the local market, marketing strategy, the level of openness; 2) *factors of infrastructure:* logistic infrastructure, infrastructure of communications, social infrastructure, financial infrastructure; 3) *factors affecting resources:* natural resources, financial resources, human resources, cultural resources, entertainment and sport resources; 4) *factors affecting the demand:* new products and services, specialization of rural tourism companies, the quality of rural tourism services, image development, full tourist package; 5) *factors affecting the related and supporting sectors:*

*strengthening of the relationship between companies engaged in rural tourism, development of the activities related to rural tourism, participation and support of the local community, activity coordination and cooperation with local authorities, cooperation between tourism entrepreneurs, cooperation with tourist information centres, development of rural tourism clusters.* The factors of these five micro-environmental groups affect the development of rural tourism as a service business in the rural area.

3. *It was established and substantiated that an evaluation of the development of the factors of rural tourism requires a systematic approach to the use of research methods.* Theoretical analysis of the development of rural tourism conception and its development as well as the factors confirmed the necessity of complex evaluation. *With regards to the complexity of research object and problem, the evaluation of the factors of rural tourism development should be carried out on two levels, i.e. theoretical and empirical.*
  - The concepts of rural tourism and rural tourism development were defined and factors affecting the development of rural tourism were analysed.
  - An evaluation of one factor (indicator) affecting the development of rural tourism does not adequately reflect the problem of identification and evaluation of rural tourism development.
  - Complex substantiation of macro-environmental and micro-environmental factors affecting the development of rural tourism contributes to the increased reliability of evaluation.
  - The use of qualitative empirical research is based on the fact that macro-environmental and micro-environmental factors affecting the development of rural tourism have not been sufficiently analysed; thus when making optimal decisions, it is necessary to rely on the experts' knowledge, experience and intuition in order to justify the reasoning of practical recommendations.
  - The use of quantitative empirical research is necessary to substantiate the statistical relationship between the development of rural tourism and factors affecting it. The development of rural tourism is defined as a process, and the impact of macro-environmental and micro-environmental factors is a phenomenon occurring in the course of events. To substantiate the impact of rural tourism development and factors affecting it, correlational (probability) relationships were used. The analysis should encompass the explanation of essential links, determination of the form of correlational relationship, determination of the strength of correlational relationship and an evaluation of the obtained results.
4. *The research has shown that the identification of macro-environmental and micro-environmental factors, their impact on the development of rural tourism and connection to a common framework describes the evaluation process of*

*the factors of rural tourism development. Based on methodological principles of rural tourism development and factors affecting it, a model of factors of rural tourism development was developed.*

- This model singled out ten main factor groups: economic, political/legal, ecological/natural, social/cultural, technological, business strategy and competition, infrastructure, resources, demand and related and supporting sectors. 27 macro-environmental and 26 micro-environmental factors were distinguished. In order to describe them, 92 quantitative and qualitative criteria (58 for macro-environmental factors and 34 for micro-environmental factors) were distinguished on the basis of the analysis of scientific literature.
  - 10 criteria and their indicators were distinguished to evaluate the process of rural tourism development. The distinguished macro-environmental and micro-environmental factors have an impact on the process of rural tourism development, i.e. the growth of the number of rural tourism businesses, tourism services and trade, the growth of investment, the development of related industry sectors and increased employment in the rural area.
5. *The model of rural tourism development factors was verified. The results of expert evaluation confirmed the reliability and practical applicability of the developed model. On the basis of scientific literature analysis and the results of expert evaluation, hypotheses H1-H10 were confirmed. On the basis of expert evaluation, the model of rural tourism development factors was revised, highlighting the diverse significance of individual factors to the development of rural tourism. The adjustment of the model made it possible to identify factors which, in the opinion of experts, i.e. representatives of Lithuanian non-profit institutions, higher education institutions, governmental institutions and businesses, had the greatest impact on the development of rural tourism. Identification of these factors enables to foresee the opportunities of Lithuanian tourism development for both decision-making organizations and representatives of rural tourism businesses.*
6. The research of the development of rural tourism in Lithuania and factors affecting it established that:
- *Macro-environmental factors affected the development of rural tourism during the analysed period (hypothesis H11 was confirmed).*
  - Economic factors, i.e. economic stability, consumer purchasing power, and tax policy affect the development of rural tourism. Lithuania's economic growth and macro-economic stability affect the country's rural tourism development process during the analysed period. Increasing consumer purchasing power has a positive impact on the development of rural tourism. The country's current tax policy was of great significance. According to research results, increasing

taxes, especially income tax, has a negative impact on the indicators of rural tourism development.

- The impact of political/legal factors on the development process of rural tourism in Lithuania was substantiated. According to research results, the impact of political/legal factors was diverse. Current tourism policy of the country did not show great progress. State budget allocations for the promotion of rural tourism and crafts, and budgetary funds allocated for recreation and culture remained almost unchanged during the analysed period. Their relationship with the development of rural tourism indicators was weak or medium. Meanwhile, the impact of the country's foreign policy on the development of rural tourism in Lithuania was significant.
- The impact of social/cultural factor, i.e. cultural peculiarities and lifestyle, on the development of rural tourism in Lithuania was strong and significant.
- The impact of natural/ecological factor, i.e. landscape, on the development of rural tourism in Lithuania was very significant during the period of analysis. The research results confirm: there is a strong and statistically significant relationship between natural/ecological factor and indicators of rural tourism development.
- *Micro-environmental factors affected the development of rural tourism during the analysed period (hypothesis H12 was confirmed).*
- Positive changes in micro-environment have an impact on the development factors of Lithuanian rural tourism companies as service business entities. The demand for the services of rural tourism businesses increased more in companies whose competitive strategy altered with regards to market changes. Employees' wages were statistically significantly higher in rural tourism companies which were more actively implementing the programmes of communication with consumers and advertising. An increasing availability of the Internet and mobile connection affected the growing number of rural tourism business services and part of new services. The increase in prices had an impact on the growth of wages of the employees of rural tourism companies. The occupation of rural tourism companies belonging to a cluster and/or actively participating with companies engaged in analogous activities increased significantly during the analysed period. Perhaps the most significant factor of related and supporting sectors was the cooperation with tourist information centres which had a positive impact on companies' profitability and income levels as well as the number of provided services, part of newly provided services and occupation of rural tourism companies.

- The research has determined that the changes of infrastructure affecting factors were diverse. An access to the Internet and mobile connection improved, while accessibility of health care institutions in rural areas has not changed during the analysed period. The indicators of factors affecting resources did not show progress either. There were slight changes in state support and EU support for Lithuanian rural tourism business. The number of natural heritage sites prepared for tourist visiting and the number of objects of cultural heritage prepared for tourist visiting in rural areas changed slightly as well. The infrastructure of leisure and entertainment in rural areas was developed unfavourably during the analysed period. No statistically significant relationships were determined between the factors affecting resources and rural tourism development.
7. In order to promote rural tourism development in Lithuania, it is recommended:
- to increase investment in improving the social and logistical infrastructure in order to improve the living conditions in rural areas and to increase the attractiveness of rural living environment;
  - to support business initiatives of rural inhabitants and to provide tax incentives for business start-ups in rural areas in order to strengthen the motivation to live and work in the countryside;
  - to increase the support for preservation and development of cultural heritage and traditional crafts;
  - to intensify cooperation between rural communities and educational institutions in order to involve rural communities in training and retraining courses, giving them the basics of business knowledge or the possibility of acquiring a new profession;
  - to strengthen the cooperation and partnership between rural tourism businesses, rural communities and regional authorities in order to foster natural heritage and local landscape;
  - to develop catering, transportation, entertainment and other activities in rural areas in order to meet the needs of a wider range of rural tourism consumers.



## REFERENCES

1. Aaker D. A. (2001). *Strategic Marketing Management*. New York: John Wiley and Sons, Inc.
2. Akbaba, A. (2012) Business performance of small tourism enterprises: a comparison among three sub-sectors of the industry, *Anatolia - an International Journal of Tourism and Hospitality Research*, 23 (2), 177-195. doi: 10.1080/13032917.2012.662907.
3. Andriulienė, R., Marozienė, I., Paaby, K., Pernavaitė, I., Radvilavičiūtė, D., & Ringailaitė, I. (2010). *Darnaus turizmo vystymo gairės*. VšĮ „DVI Darnaus vystymo iniciatyvos“.
4. Andriuščenka, J. (2003). Strategic planning problems and perspectives. *Organizacijų vadyba: sisteminiai tyrimai*, 28, 3-16.
5. Antonakis, N., Dragouni, M., & Filis, G. (2015). How strong is the linkage between tourism and economic growth in Europe? *Economic Modelling*, 44, 142-155. doi: <http://dx.doi.org/10.1016/j.econmod.2014.10.018>.
6. Aref, F., & Gill, S. S. (2009). Rural Tourism Development through Rural Cooperatives. *Nature and Science*, 7 (10), 68-73.
7. Armaitienė, A. Grecevičius, P. Urbis, & A. Vainienė, I. (1999). *Kaimo turizmas*. Vilnius: LTD „Valstiečių laikraštis“.
8. Astromskienė, A. (2009). Vadybiniai kaimo turizmo verslo raidos Lietuvoje aspektai. *Vadybos mokslas ir studijos-kaimo verslų ir jų infrastruktūros plėtrai*, 4 (19), 14-20.
9. Astromskienė, A., Kleinienė, D., & Tiškienė, G. (2007). Kaimo turizmo plėtros Lietuvoje pokyčiai. *Vadybos mokslas ir studijos – kaimo verslų ir jų infrastruktūros plėtrai*, 11 (4), 10-14.
10. Astromskienė, Ramanauskienė, J., & Adamonienė, R. (2012). Alternatyviosios veiklos kaimo vietovėse plėtros perspektyvos. *Vadybos mokslas ir studijos – kaimo verslų ir jų infrastruktūros plėtrai*, 2 (31), 6-14.
11. Atkočiūnienė, V. (2011). Kaimo turizmo, kaip užimtumo multiplikatoriaus, kaimo vietovėse teorinis aspektas. *Management theory and studies for rural business and infrastructure development*, 5 (29), 33-42.
12. Bagdonienė, L., & Hopenienė R. (2005). *Paslaugų marketingas ir vadyba*. Kaunas: Technologija.
13. Bel, F., Lacroix, A., Lyser, S., Rambonilaza, T., & Turpin, N. (2015). Domestic Demand for Tourism in Rural Areas: Insights from Summer Stays in Three French Regions. *Tourism Management*, 46, 562-570. doi: <http://dx.doi.org/10.1016/j.tourman.2014.07.020>.
14. Bosma, N. & Stam, E. (2012). Local policies for high-employment growth enterprises. [žiūrėta 2015-04-22]. Prieiga per internetą: [http://www.vlaio.be/sites/default/files/documenten/2012\\_stam\\_-\\_local\\_policies\\_for\\_high-emplment\\_growth\\_enterprises.pdf](http://www.vlaio.be/sites/default/files/documenten/2012_stam_-_local_policies_for_high-emplment_growth_enterprises.pdf).

15. Boškovič, T., Tomič, R., & Tomič, D. (2013). Potentials and Limitations for the Development of Rural Tourism in Vojvodina. *Economics of Agriculture*, IAE Belgrade, 60 (1), 103-111.
16. Botezat, E. (2003). *Strategii manageriale in turism*, Editura Economica, Bucuresti.
17. Ramanauskienė, J., & Brazaitytė, V. (2006). Kaimo turizmo paslaugų įvaidzdžio formavimas. Jaunųjų mokslininkų darbai, (1 (8)), 104-108.
18. Dapkus, R. (2008). Kultūrinio turizmo plėtros perspektyvos. *Vadybos mokslas ir studijos–kaimo verslų ir jų infrastruktūros plėtrai*, 15 (4), 29-40.
19. Darau, A. P., Corneliu, M., Brad, M. L., & Avram, E. (2010). The Concept of Rural Tourism and Agritourism. [Žiūrėta 2015-08-10]. Prieiga per internetą: <http://www.facultateadeinginerie.ro/studia/studia51/51-darau-p39.pdf>.
20. Dimitrovski, D. D., Todorovič, A. T., & Valjarevič, A. D. (2012). Rural tourism and regional development: Case study of development of rural tourism in the region of Gruža, Serbia. *Procedia Environmental Sciences*, 14, 288-297.
21. European Commission (2013). Rural Development in the European Union: Statistical and Economic Information, *Report 2013*. [žiūrėta 2015-04-22]. Prieiga per internetą [http://ec.europa.eu/agriculture/statistics/rural-development/2013/full-text\\_en.pdf](http://ec.europa.eu/agriculture/statistics/rural-development/2013/full-text_en.pdf).
22. Gargasas, A., & Večerskas, D. (2013). Kaimo turizmo paslaugų plėtros galimybės: Marijampolės apskrities atvejis. *Organizacijų Vadyba: Sisteminiai Tyrimai*, 65, 7-19. doi: <http://dx.doi.org/10.7220/mOSR.1392.1142.2013.65.1>.
23. Garin-Munoz, T., & Montero-Martin, L. F. (2007). Tourism in the Balearic Islands: a Dynamic Model for International Demand Using Panel Data. *Tourism Management*, 28 (5), 1224-1235. doi: <http://dx.doi.org/10.1016/j.tourman.2006.09.024>.
24. Gartner, W. C. (1996). *Tourism Development. Principles, processes and policies*. New York: John Wiley and Sons.
25. George, E.W., Mair, H., & Reid, D. G. (2009). *Rural Tourism Development Localism and Cultural Change*. Toronto: Chanel View Publications.
26. Gražulis, V., & Narkūnienė, R. (2016). The assumptions of successful development of rural tourism in Lithuania (case study of Eastern Aukštaitija region). Proceedings of the International Scientific Conference: Rural Development 2015, 1-6.
27. Gudelytė, L., Lančinskienė, A., & Skaržauskienė, A. (2014). Klasterių veikla Lietuvoje: iššūkiai ir galimybių paieška. *Socialnės Technologijos*, 1, 192-204.
28. Gunn, C. A. (1988). *Tourism Planning*. 2ed. New York: Taylor and Francis.
29. Hassan, S. S. (2000). Determinants or Market Competitiveness on Environmentally Sustainable Tourism Industry. *Journal of Travel Research*, 38 (3), 239-245.
30. Hall, D.R., Roberts, L., & Mitchell, M. (2005). *New directions in rural tourism*. Hants, Ashgate.
31. Hall, C. M., & Williams, A. M. (2008). *Tourism and Innovation*. London: Routledge.
32. Hjalager, A. M. (2002). Repairing innovation defectiveness in tourism. *Tourism management*, 23(5), 465-474.

33. Hopenienė, R., & Kamičaitytė, A. (2004). Tolydi turizmo plėtra. Konkurencingos turizmo sistemos kūrimo prielaidos. *Organizacijų vadyba: Sisteminiai tyrimai*, 29, 49-65. Kaunas: Vytauto didžiojo universitetas.
34. Hsieh, P., & Lee, C. (2012). A note on value creation in consumption-oriented regional service clusters. *Competitiveness Review*, 22(2), 170-180. doi:10.1108/10595421211205994
35. Ivanauskaitė, T. (2012). Demografinių veiksnių poveikis darniam vystymuisi. *Informacijos mokslai*, (62), 67-80.
36. Jasinskas, E., Guzavičius, A., & Barkauskienė, K. (2014). Valstybės paramos poveikis kaimo turizmo sodybų vystymuisi. *Vadybos mokslas ir studijos - kaimo verslų ir jų infrastruktūros plėtrai: mokslo darbai*. 36 (4), 844-852.
37. Jasinskas, E., Svagzdiene, B., & Bandurin, A. (2014). Significance of financial support of structural funds for the Ccompetitive ability of rural tourism homesteads. *Transformations in Business & Economics*, 13 (2A), 324-342.
38. Jazczak, A., & Żukovskis, J. (2010). *Tourism business in development of European rural areas*. Kaunas: Akademija.
39. Kadir, K., & Sibel, S. (2014). Determinant of tourist inflows to Romania: evidence from Augmented panel gravity model. *Annals of the University of Oradea, Economic Science Series*, 23 (1), 347-358.
40. Katsaitis, O., & Doulos, D. (2009). The impact of EU structural funds on FDI. *Kyklos*, 62(4), 563-578.
41. Koa, D., & Stewart, W. (2002). A structural equation model of residents' attitudes for tourism development. *Tourism Management*, 23, 521-530.
42. Kotler, P., Armstrong, G., Saunders, J., & Wong, V. (2003). *Rinkodaros principai*. Kaunas: UAB Poligrafija ir informatika.
43. Kreag, D. (2001). *The Impacts of Tourism: Minnesota SeaGrant Program*
44. Labanauskaitė D. (2011). Atvykstamojo turizmo įtakos regionų ekonominiam augimui vertinimas. *Management theory and studies for rural business and infrastructure development*, 1 (25), 154-162.
45. Lankford, S. V., & Howard, D. R. (1994). Developing a tourism impact attitude scale. *Annals of tourism research*, 21 (1), 121-139.
46. Lazauskas A. (2015). Globalizacijos tendencijos turizmo sektoriuje. *Mokslas ir praktika. Aktualijos ir perspektyvos*. [žiūrėta 2016-04-27]. Prieiga per internetą: [http://www.lsu.lt/sites/default/files/dokumentai/tezes\\_leidinyv\\_2015\\_04\\_14\\_galutinis\\_variantas\\_v2.pdf#page=29](http://www.lsu.lt/sites/default/files/dokumentai/tezes_leidinyv_2015_04_14_galutinis_variantas_v2.pdf#page=29).
47. Li, Y., Zheng, X. & Liu, Y. (2016). Bottom-up initiatives and revival in the face of rural decline: case studies from China and Sweden. [žiūrėta 2016-05-22]. Prieiga per internetą: [http://ac.els-cdn.com/S0743016716301267/1-s2.0-S0743016716301267-main.pdf?\\_tid=c5b8b0e0-5a85-11e6-8f50-00000aab0f26&acdnat=1470344307\\_86db4c7ad97845350eddd77730019639](http://ac.els-cdn.com/S0743016716301267/1-s2.0-S0743016716301267-main.pdf?_tid=c5b8b0e0-5a85-11e6-8f50-00000aab0f26&acdnat=1470344307_86db4c7ad97845350eddd77730019639).
48. Lietuvos statistikos departamentas (2016). *Kaimo turizmas 2015 m.* [žiūrėta 2016-06-27]. Prieiga per internetą: <http://osp.stat.gov.lt/informaciniai-pranesimai/>

49. Ligeikienė, A. R. (2003). *Turizmo plėtra ir valdymas. Daktaro disertacijos santrauka*. Kaunas: Kauno kolegijos leidybos centras.
50. Lominé, L., & Edmunds, J. (2007). *Key concepts in tourism*. Basingstoke: Palgrave Macmillan.
51. Mafunzwaini, A. E., & Hugo, L. (2005). Unlocking the rural tourism potential of the Limpopo province of South Africa: some strategic guidelines. *Development Southern Africa*, 22 (2), 253-265. doi: 10.1080/03768350500163048.
52. Maksimovič, M., Urošević, S. & Damjanovič, Z. (2015). Theoretical Concepts of Rural Tourism and Opportunities for Development in the Republic of Serbia. *Economics, Management, Information and Technology*, 3 (3), 162-172.
53. Markauskienė, A., Gižienė, V. (2012). Atvykstantojo turizmo poveikis šalies ekonomikai. *Economics and management*, 17 (3), 1003-1009.
54. Mehmetoglu, M. (2007). Typologising Nature-Based Tourists by Activity - Theoretical and Practical Implications. *Tourism Management*, 28 (3), 651-660. doi: <http://dx.doi.org/10.1016/j.tourman.2006.02.006>.
55. Meschi, I., Župerka, A. & Župerkienė, E. (2015). Inovacijų diegimą lemiantys veiksniai Klaipėdos miesto turizmo sektoriuje. *Tiltai*, 70 (1), 115-126. doi: <http://dx.doi.org/10.15181/tbb.v69i1.1054>.
56. Mohl, P., & Hagen, T. (2010). Do EU structural funds promote regional growth? New evidence from various panel data approaches. *Regional Science and Urban Economics*, 40 (5), 353-365.
57. Nair, V., Munikrishnan, U. T., Rajaratnam, S. D., & King, N. (2015). Redefining Rural Tourism in Malaysia: A Conceptual Perspective. *Asia Pacific Journal of Tourism Research*, 20 (3), 314-337. doi: Pacific Journal of Tourism Research, 20 (3), 314-337.
58. Ogarlaci M., & Popa N. (2011). Sustainable development in rural tourism. *Agricultural Management/Lucrari Stiintifice Seria I, Management Agricol*, 13 (4), 55-64.
59. Payne, J. E. & Mervar, A. (2010). The tourism-growth nexus in Croatia. *Tourism Economics*, 16 (4), 1089-1094. doi: 10.5367/te.2010.0014.
60. Paulauskienė, L. (2014). Prospects for improving the governance of tourism in Lithuania: interaction of the national and local levels. *Management Theory and Studies for Rural Business and Infrastructure Development*, 36 (1), 92-105.
61. Pender, L., & Sharpley, R. (2005). *The management of tourism*. London: Sage Publication.
62. Ramanauskas, J., & Gargasas, A. (2011). Kaimo turizmo sodybų veiklos vertinimas darnaus vystymosi aspektu. *Management theory and studies for rural business and infrastructure development*, 26 (2), 186-192.
63. Ramanauskienė, J., Astromskienė, A., & Andriūnas, V. (2010). Lietuvos kaimo turizmo verslo konkurencingumo didinimo priemonės. *Management theory and studies for rural business and infrastructure development*, 24 (5), 136-146.

64. Ramanauskienė, J., Gargasas, A., & Rimkienė, I. (2011, November). Solutions for Rural Tourism Service Quality Management. *In Proceedings of the International Scientific Conference: Rural Development*, 5 (1), 195-203.
65. Ramanauskienė, J., Rukuižienė, R., Sirusienė, R., Gargasas, A., & Petrauskienė, R. (2008). Kaimo turizmo ir amatų plėtros galimybių Lietuvoje tyrimas. *Ekonomikos ir vadybos fakulteto 2007 metų mokslinių tyrimų rezultatai. Mokslinės konferencijos straipsnių rinkinys*, 1 (4), 58-63.
66. Ramanauskienė, J., & Vagonis, Z. (2010). Kaimo turizmo ir amatų sąveikos nauda, skatinimo galimybės. *LŽŪU mokslo darbai*, 86 (39), 20-27.
67. FGEORGE
68. Randelli, F., Romei, P. & Tortora, M. (2014). An evolutionary approach to the study of rural tourism: the case of Tuscany. *Land Use Policy*, 38, 276-281. doi:10.1016/j.landusepol.2013.11.009.
69. Rid, W., Ezeuduj, I. O., & Probstl-Haider, U. (2013). Segmentation by motivation for rural tourism activities in The Gambia. *Tourism Management*, 40, 102-116. doi: 10.1016/j.tourman.2013.05.006.
70. Romikaitytė, B., & Kisieliauskas, J. (2012). Lietuvos turizmo sektoriaus plėtrai įtaką darantys veiksniai. *Management theory and studies for rural business and infrastructure development*, 2 (31).
71. Rukuižienė, R. (2007). Lietuvos kaimo turizmo sektoriaus plėtros galimybių tyrimas. *Ekonomikos ir vadybos fakulteto 2007 metų mokslinių tyrimų rezultatai*, 36-42.
72. Rukuižienė, R. (2008). Lietuvos kaimo turizmo sektoriaus plėtros galimybių tyrimas. *Ekonomikos ir vadybos fakulteto 2007 metų mokslinių tyrimų rezultatai. Mokslinės konferencijos straipsnių rinkinys*, 1 (4), 36-42.
73. Rukuižienė, R. (2009). Rural tourism service quality management: Theoretical approach. *Rural Development 2009*, 135-140.
74. Saarinen, J., & Lenao, M. (2014). Integrating Tourism to Rural Development and Planning in the Developing World. *Development Southern Africa*, 31 (3), 363-372. doi: 10.1080/0376835X.2014.888334.
75. Sharpley, R., & Roberts, L. (2004). Rural Tourism – 10 Years On. *International Journal of Tourism Research*, 6, 119-124.
76. Silva, L., & Leal, J. (2015). Rural Tourism and National Identity Building in Contemporary Europe: Evidence from Portugal. *Journal of Rural Studies*, 38, 109-119. doi: <http://dx.doi.org/10.1016/j.jrurstud.2015.02.005>.
77. Singh, D. R., McDavid, H., Birch, A., & Wright, A. (2008). The determinants of FDI in small developing nation states: an exploratory study. *Social and economic studies*, 57 (3/4), 79-104.
78. Sinkienė, J. (2008). Miesto konkurencingumo veiksniai. *Viešoji politika ir administravimas*, 25, 68-83.
79. Snieška, V., Barkauskienė, K., & Barkauskas, V. (2014). The Impact of Economic Factors on the Development of Rural Tourism: Lithuanian Case. *Procedia-Social and Behavioral Sciences*, 156, 280-285.

80. Stynes J.D., & O'Halloran C. (2004). *Tourism Planning*. Michigan State University.
81. Swarbrooke J. (1999) *Sustainable tourism management*. London: CABI-publishing.
82. Šimkova, E. (2007). Strategy approaches to rural tourism and sustainable development of rural areas. *Agricultural Economics–czech*, 53 (6), 263-270.
83. Tang, C.F. (2011). Is the tourism-led growth hypothesis valid for Malaysia? A view from disaggregated tourism markets. *International Journal of Tourism Research*, 13 (1), 97-101. doi: 10.1002/jtr.807.
84. Tsephe, N. P., & Eyono Obono, S. D. (2013). A Theoretical Framework for Rural Tourism Motivation Factors. *International Journal of Social, Behavioral, Educational, Economic, Business and Industrial Engineering*, 7 (1), 273-278.
85. Tosun, C. (2002) Host perceptions of impacts: A comparative tourism study. *Annals of Tourism Research*, 29 (1), 231-253.
86. Tovar, C., & Lockwood, M. (2008). Social impacts of tourism: An Australian regional case study. *International journal of tourism research*, 10, 365-378.
87. Tribe J., Font, X., Griffiths N., Vickery R., & Yale K. (2000). *Environmental management for rural tourism and recreation*. London: Cassell, 2000.
88. Tugcu, C. T (2013). Tourism and economic growth nexus revisited: a panel causality analysis for the case of the Mediterranean Region. *Tourism Management*, 42, 207-212. doi: <http://dx.doi.org/10.1016/j.tourman.2013.12.007>.
89. UNWTO (2016). *Speech by UNWTO Secretary-General Taleb Rifai*. [žiūrėta 2016-06-27]. Prieiga per internetą: <https://custom.cvent.com/E5C28A0D212A415D9AD3C8B699EBC072/files/12db668f2a524dd896d692fd7e50b115.pdf>
90. Vijaykumar, N., Sridharan, P., Rao, K., & Ch. S. (2010). Determinants of FDI in BRICS countries: a panel analysis. *Journal of Business Science and Applied Management*, 5 (3), 1-13.
91. Vitkienė, E. (2002). *Recreation*. Klaipėda: S. Jokužis publishing-printing house.
92. Weaver, D., & Lawton, L. (2001) Resident perceptions in the urban – rural fringe. *Annals of Tourism Research*, 28 (2), 349-358.
93. Wilson, S., Fesenmaier, D. R., Fesenmaier, J. & Van Es, J.C. (2001). Factors for Success in Rural Tourism Development. *Journal of Travel Research*, 40, 132-138
94. Zdorov, A.B. (2004). *Tourism Economics*. Moscow: The Finance and statistics.
95. Žalienė, I., & Sabaliauskaitė, A. (2002). *Pasaulio ir Lietuvos turizmo raida*. Kaunas: LKKA.
96. Žalys, L., Žalienė, I., & Iždonaitė, I. (2006). Lietuvos kaimo turizmo charakteristika ir plėtros politika. *Ekonomika ir vadyba: aktualijos ir perspektyvos*, 2 (7), 180-179.
97. Žilinskas, V. J., & Maksimenko, M. (2008). Kaimo turizmo darnios plėtros perspektyvos. *Vadybos mokslas ir studijos – kaimo verslų ir jų infrastruktūros plėtrai*, 13 (2).
98. Žilinskas V.J., & Petravičienė L. (2007) Turizmo verslas: plėtros konceptualizacija ir tendencijos Lietuvoje. *Ekonomika ir vadyba*, 12, 954-958.

99. Župerka, A. & Župerkienė, E. (2014). Lietuvos pasienio regionų kaimiškųjų vietovių verslumo veiksmų tyrimas. *Regional Formation and Development Studies*, 11 (1), 230-242.

## PUBLICATIONS

### Publications referred in other international databases

1. Barkauskas, Vytautas; **Barkauskienė, Kristina**; Jasinskas, Edmundas. Analysis of macro environmental factors influencing the development of rural tourism: Lithuanian case // *Procedia social and behavioral sciences: 20th international scientific conference economics and management 2015 (ICEM-2015)*. Amsterdam: Elsevier. ISSN 1877-0428. 2015, vol. 213, p. 167–172. [M.kr. 04S].
2. Snieška, Vytautas; **Barkauskienė, Kristina**; Barkauskas, Vytautas. The impact of economic factors on the development of rural tourism: Lithuanian case // *Procedia social and behavioral sciences: 19th international scientific conference economics and management 2014, ICEM-2014, 23–25 April 2014, Riga, Latvia*. Amsterdam: Elsevier. ISSN 1877-0428. 2014, vol. 156, p. 280–285. [M.kr. 04S].
3. Jasinskas, Edmundas; Guzavičius, Andrius; **Barkauskienė, Kristina**. Valstybės paramos poveikis kaimo turizmo sodybų vystymuisi // *Vadybos mokslas ir studijos – kaimo verslų ir jų infrastruktūros plėtrai: mokslo darbai = Management theory and studies for rural business and infrastructure development: research papers / Aleksandro Stulginskio universitetas. Lietuvos agrarinės ekonomikos institutas. Kaunas, Akademija: ASU Leidybos centras*. ISSN 1822-6760. 2014, t. 36, Nr. 4, p. 844–852. [M.kr. 04S].
4. **Barkauskienė, Kristina**; Snieška, Vytautas. Ecotourism as an integral part of sustainable tourism development // *Economics and management = Ekonomika ir vadyba [elektroninis išteklius] / Kaunas University of Technology*. Kaunas: KTU. ISSN 1822-6515. 2013, No. 18 (3), p. 449–456. [M.kr. 04S].
5. **Barkauskienė, Kristina**; Barkauskas, Vytautas. Kauno regiono gyventojų turizmo produktų pasirinkimą lemiantys veiksniai // *Economics and management = Ekonomika ir vadyba [elektroninis išteklius] / Kaunas University of Technology*. Kaunas: KTU. ISSN 1822-6515. 2012, no. 17(3), p. 936–943. [M.kr. 04S].

### Publications referred in the proceedings of international conferences

1. Barkauskas, Vytautas; Guzavičius, Andrius; **Barkauskienė, Kristina**. Kauno regiono gyventojų turizmo į Lenkijos pasienio regioną patrauklumo vertinimas // *Turizmo patrauklumo didinimo link Lietuvoje ir Lenkijoje = Zwiększenie atrakcyjności turystycznej Litwy i Polski = Towards improving tourism attractiveness in Lithuania and Poland: tarptautinės mokslinės konferencijos mokslo darbai / Kauno technologijos universitetas, Balstogės aukštesnioji vadybos mokykla*. Kaunas: Technologija, 2011, ISBN 9789955259312. p. 85-92. [M.kr. 03S].



## INFORMATION ABOUT THE AUTHOR OF THE DISSERTATION

**Name:** Kristina Barkauskienė  
**Contacts:** kristina.barkauskiene@ktu.edu;  
kristina.barkauskiene@yahoo.com

### ***Academic background:***

2011–2016 Doctoral studies at Kaunas University of Technology, School of Economics and Business  
2005–2007 Master’s studies at Kaunas University of Technology, Faculty of Economics and Management, Master degree in Economics, specialization – Insurance and banking  
2001–2005 Bachelor studies at Kaunas University of Technology, Faculty of Economics and Management, Bachelor degree in Economics, specialization – Finance

### ***Work experience:***

2016–present *Market risk specialist* of Lithuanian central credit union.  
2014–2015 *Director, project manager* of „Lietuvos Gurmanas“, Ltd.  
2005–2014 *Personal finance advisor, investment services manager, assistant* in SEB bank.

### ***Fields of scientific interests:***

*Tourism, rural tourism, competitiveness, microeconomics, macroeconomics, international trade.*

## REZIUMĖ

### Temos aktualumas

Daugelio pasaulio šalių, tarp jų ir Lietuvos, tikslas, susijęs su tvaria ilgalaikė ūkio plėtra ir palankios konkurencinės pozicijos globalioje rinkoje įgijimu, yra turizmo, kaip potencialą šalies ekonomikos augimui turinčios ūkio šakos, plėtra. Turizmas teigiamai veikia šalies ekonomikos plėtrą: skatina bendradarbiavimą tarp regionų, mažų ir vidutinių įmonių veiklą, sukuria naujas darbo vietas ir didina šalies pajamas (Barkauskienė ir Barkauskas, 2012). Be to, turizmo plėtra skatina ir kitų ūkio šakų – transporto ir maisto pramonės, statybos ir žemės ūkio bei kitų – vystymąsi. Turizmas – svarbi ekonominė veikla, daranti teigiamą poveikį tiek šalies, tiek globalios ekonomikos augimui, užimtumui. 2016 m. surengtoje Pirmojoje pasaulinėje konferencijoje, skirtoje turizmo plėtrai, Jungtinių Tautų (JT) Pasaulio turizmo organizacijos (PTO) generalinis sekretorius Taleb Rifai akcentavo, kad turizmas dabar sudaro 10 % pasaulio BVP, 7 % pasaulio eksporto, 30 % paslaugų eksporto ir kad viena iš vienuolikos sukurtų darbo vietų priklauso turizmo pramonei. Be to, jis pabrėžė, kad turizmo plėtra ne tik skatina ekonomikos augimą, bet ir stiprina tautų savitarpio supratimą ir taiką, reikšmingai prisideda prie aplinkosaugos gerinimo, kuria darbo vietas ir atveria naujų galimybių. Būtent kaimo vietovių bendruomenės turėtų būti suinteresuotos turizmo plėtra, kurios kuriamos naujos galimybės naudingos tų bendruomenių vystymuisi (UNWTO, 2016). Remiantis Europos Komisijos ataskaita apie kaimo vystymą Europos Sąjungoje, galima pabrėžti, kad maždaug 52 % Europos teritorijos klasifikuojama kaip kaimiška, 38 % – kaip tarpinės grandies ir tik 10 % – kaip miesto (European Commission, 2013).

Nors daugiau nei šimtmetį vyrauja tradicinė prielaida, jog gyvenimo lygis miestuose aukštesnis, kaimo vietovių ekonominės, socialinės ir politinės sąlygos, veikiamos industrializacijos ir urbanizacijos, pakito. Kaimo kaita vyksta visoje Europoje. Keičiasi kaimo gyventojų skaičius ir sudėtis, užimtumas ir gyvenimo būdas. Šiuo požiūriu kaimo turizmas – viena iš didžiausių galimybių kaimo vietovėms augti ir vystytis. Kaimo turizmo plėtra ne tik padeda susidoroti su naujais iššūkiais, su kuriais susiduriama kaimo vietovėse didinant žemės ūkio ir miškų ūkio, kaimo vietovių ir regionų konkurencingumą, bet ir skatina ekonominių veiklų diversifikaciją tose vietovėse. Kaimo turizmo paslaugų vartotojams vis svarbiau tampa maisto kokybė, kraštovaizdis, relaksacijos ir rehabilitacijos galimybės, vietinė kultūra, kaimo tradicijos, o ne mažiausia paslaugos kaina. Kaimo turizmui, kaip paslaugų ūkio verslui kaime, didelę įtaką daro verslo aplinka. Ji kinta vis sparčiau ir verslo įmonėms, siekiančioms išlikti konkurencingoms ir plėtoti veiklą, būtina reaguoti į aplinkos pokyčius: pasinaudoti makroaplinkos ir mikroaplinkos privalumais ir sumažinti jų neigiamą poveikį. Verslo aplinka daro reikšmingą įtaką paslaugų verslo potencialui ir sėkmei. Numatomi kaimo turizmo plėtos tikslai ir strategijos turi būti orientuoti

atsižvelgiant į verslo aplinką, suteikiančią galimybių, tačiau taip pat lemiančią sudėtingas aplinkybes.

Lietuvoje kaimo turizmo plėtra prasidėjo praėjusio šimtmečio paskutiniame dešimtmetyje, tačiau tai nebuvo naujos veiklos plėtojimas. Lietuvos kaimo sodybose poilsiaujama jau nuo praėjusio šimtmečio pradžios. Natūraliais kraštovaizdžiais pasižyminčiose vietovėse plėtojamas kaimo turizmas pastaraisiais metais įgauna vis didesnę reikšmę, bet kaimo turizmo paslaugų lyginamasis svoris bendrojoje turizmo paslaugų rinkoje išlieka nedidelis. Be to, remiantis Lietuvos statistikos departamento duomenimis (2017), 2016 m. kaimo turizmo sodybose ilsėjosi 4,8 % daugiau turistų nei 2015 m. ir tik 9,3 % kaimo turizmo sodybose apsilankusių turistų buvo užsieniečiai. Būtent užsienio turistai daro poveikį naujų ekonominių ryšių atsiradimui, investicijų pritraukimui, šalies ekonominės ir socialinės galios suvokimui.

Lietuvoje vykstantys ekonominiai integracijos procesai ir tarptautinių ryšių su pasaulio šalimis plėtojimas veikia turizmo, įskaitant ir kaimo turizmą, plėtrą. Lietuva turi daug kaimo turizmo plėtros galimybių: palanki geografinė padėtis, graži gamta, švelnus klimatas, kultūriniai kaimo objektai, architektūros ir istorijos paminklai, svetingi žmonės. Visa tai sudaro labai geras kaimo turizmo plėtros prielaidas. Verslo aplinka Lietuvoje nuolat kinta. Keičiasi tiek makroaplinkos sąlygos, tiek mikroaplinką lemiantys veiksniai. Lietuvoje šios verslo aplinkos, kaip kaimo turizmo plėtros sąlygos, išnaudojamos nepakankamai, o pagal kaimo turizmo išvystymą ir iš jo gaunamas pajamas Lietuva gerokai atsilieka nuo šioje srityje pirmaujančių šalių. Kaimo turizmo plėtrai palankių makroaplinkos ir mikroaplinkos veiksnių nustatymas – būtina sąlyga siekiant padidinti kaimo turizmo konkurencingumą ir numatyti kaimo turizmo plėtros perspektyvas.

Siekiant įvairiapusiškai įvertinti kaimo turizmo plėtrai įtaką darančius veiksnius, nebeužtenka tradicinių statistikos instrumentų, reikia papildomų rodiklių. Svarbu nustatyti, iširti ir įvertinti naujus metodus, atspindinčius makroaplinkos ir mikroaplinkos veiksnių poveikį kaimo turizmo potencialui. Empiriniai įrodymai leistų objektyviau įvertinti makroaplinkos ir mikroaplinkos veiksnių poveikio kaimo turizmo potencialui esmę. Kiekybiniais rodikliais pagrįsti ryšiai tarp verslo aplinkos veiksnių ir kaimo turizmo plėtros būtų reikšmingesni argumentai nei vien teoriniai samprotavimai.

### **Mokslinė problema ir jos ištyrimo lygis**

Kaimo turizmo būklė, reikšmė kaimo plėtrai ir kaimo turizmo veiklos organizavimas įvairiais aspektais mokslo darbuose nagrinėti Lietuvos mokslininkų: Astromskienės ir kt. (2007, 2012), Armaitienės ir kt. (1999), Hopenienės ir Kamičaitytės (2004), Paulauskienės (2014), Ramanausko ir Gargaso (2011), Ramanauskienės ir Vagonio (2010), Rukuižienės ir kt. (2007, 2008, 2009), Ramanauskienės ir kt. (2008), Vitkienės (2002), Žalienės ir Sabaliauskaitės (2002) ir kt. Paminėtini ir užsienio šalių autoriai: Bel ir kt. (2015), Darau ir kt. (2010), Garin-Munoz ir Montero-Martin (2007), Gartner (1996),

Hassan (2000), Hall ir kt. (2005, 2008), Maksimovič ir kt. (2015), Mehmetoglu (2007), Nair ir kt. (2015), Ogarlaci ir Popa (2011), Saarinen ir Lenao (2014), Sharpley ir Roberts (2004), Silva ir Lean (2015), Swarbrooke (1999), Tsephe ir Eyono Obono (2013), Tribe ir kt. (2000).

Kaimo turizmo specifika ir formas analizavo Andriulienė ir kt. (2010), Gartner (1996), Hassan (2000), Hopenienė ir Kamičaitytė (2004), Hall ir kt. (2005), Jaszczak ir Žukovskis (2010), Ogarlaci ir Popa (2011).

Aaker (2001), Andriuščenka (2003), Atkočiūnienė (2011), Bagdonienė ir Hopenienė (2005), Kotler ir kt. (2003), Kreag (2001), Markauskienė ir Gižienė (2012), Tosun (2002), Weaver ir Lawton (2001), Tovar ir Lockwood (2008), Aref ir Redzuan (2010) nagrinėjo ekonominį ir neekonominį turizmo, įskaitant ir kaimo turizmą, poveikį.

Kaimo turizmo plėtros proceso apibrėžtis pateikė Dapkus (2008), Dimitrovski ir kt. (2012), Gunn (1988), Lankford ir Howard (1994), Ligeikienė (2003), Lomine (2007), Koa ir Stewart (2002), Žalys ir kt. (2006).

Makroaplinkos veiksnių įtaką kaimo turizmo plėtrai nagrinėjo Lietuvos bei užsienio mokslininkai. Dažniausiai moksliniuose darbuose nagrinėjama tam tikrų makroaplinkos veiksnių grupių įtaka kaimo turizmo plėtrai. Ekonominių veiksnių poveikį kaimo turizmo, kaip nacionalinio turizmo šakos, plėtrai akcentavo Antonakis ir kt. (2015), Gargasas ir Večerskas (2013), Jasinskas ir kt. (2014), Payne ir Mervar (2010), Ramanauskienė ir kt. (2010), Rid ir kt. (2013), Singh ir kt. (2008), Snieška ir kt. (2014), Tang (2011), Tugcu (2013), Vijayakumar ir kt. (2010), Župerka ir Župerkienė (2014), Šimkova (2007), Žalys ir kt. (2006), Botezat (2003), Ramanauskienė ir kt. (2010), Romikaitytė ir Kisieliauskas (2012). Politinių ir teisinių veiksnių poveikį kaimo turizmo plėtrai analizavo Randelli ir kt. (2014), Rahmani ir kt. (2013), Maxton (2015), Ezeuduji (2015), Šimkova (2006), Žalys ir kt. (2006), Barbu (2013). Gamtinių ir ekologinių veiksnių įtaką kaimo turizmo plėtrai pabrėžė Ramanauskienė ir kt. (2010), Sinkienė (2008), De Freitas (2003), Astromskienė ir Andriūnas (2010), Romikaitytė ir Kisieliauskas (2012), Li ir kt. (2016), o Akbaba (2012), Astromskienė (2009), Bosma ir Stam (2012), Mafunzwaini ir Hugo (2005), Ramanauskas ir Gargasas (2011), Ramanauskienė ir kt. (2010), Rid ir kt. (2013), Žilinskas ir Maksimenko (2008), Sinkienė (2008) ir Ivanauskaitė (2012) nagrinėjo socialinių ir kultūrinių veiksnių poveikį. Technologinius veiksnius, kaip darančius įtaką kaimo turizmo plėtrai, analizavo Hall ir Williams (2008), Lazauskas (2015), Li ir kt. (2016), Meschi ir kt. (2015), Hjalager (2002).

Įvairių mikroaplinkos veiksnių grupių įtaką kaimo turizmo plėtrai tyrė Lietuvos ir užsienio mokslininkai: įmonės strategijos ir konkurencijos – Stynes ir O'Halloran (2004), Kotler ir kt. (2003), Labanauskaitė (2011), Žilinskas ir Petravičienė (2007), Wilson ir kt. (2001), Marin ir kt. (2013); infrastruktūros veiksnių – Wilson ir kt. (2001), Zdorov (2004), Kotler ir kt. (2003), Middleton ir kt. (2009), Labanauskaitė (2011), Žilinskas ir Petravičienė (2007); išteklių –

Stynes ir O`Halloran (2004), Zdorov (2004), Boškovič ir kt. (2013), Žalys ir kt. (2006), Astromskienė ir kt. (2007), Mohl ir Hagen (2010), Katsaitis (2009), Kadirir Sibel (2014), Žilinskas ir Maksimenko (2008), Jasinskas ir kt. (2014); paklausos veiksnių – Rukuižienė (2008), Ramanauskienė ir kt. (2008, 2011), Pender ir Sharpley (2005), Gražulis ir Narkūnienė (2015), Brazaitytė ir Ramanauskienė (2006); susijusių ir remiančių sektorių veiksnių – Andriulienė ir kt. (2010), Stynes ir O`Halloran (2004), Gudelytė ir kt. (2014), Hsieh ir Lee (2012).

Nors mokslinėje literatūroje didėja dėmesys kaimo turizmo plėtrai ir jai įtaką darantiems veiksniams, tačiau iki šiol nėra išsamios kaimo turizmo plėtros veiksnių nustatymo ir vertinimo analizės. Nė vienas šią problemą tyręs autorius savo darbe nepateikė metodologiškai pagrįsto kaimo turizmo plėtros veiksnių modelio, kuriame būtų išskirti pagrindiniai kaimo turizmo plėtrai poveikį darantys makroaplinkos ir mikroaplinkos veiksniai ir parodyta jų įtaka kaimo turizmo plėtrai.

**Mokslinė problema** – kaip nustatyti ir vertinti kaimo turizmo plėtros veiksnius.

**Mokslinio darbo objektas** – kaimo turizmo plėtros veiksniai.

**Mokslinio darbo tikslas** – suformuoti kaimo turizmo plėtros veiksnių modelį nustatant makroaplinkos ir mikroaplinkos veiksnius.

Tiksliui pasiekti suformuluoti šie **darbo uždaviniai**:

1. Išnagrinėjus kaimo turizmo sampratos raidos ypatumus ir kaimo turizmo plėtros aspektus, patikslinti kaimo turizmo ir kaimo turizmo plėtros sąvokų apibrėžtis.

2. Nustatyti ir susisteminti kaimo turizmo plėtrai įtaką darančius makroaplinkos ir mikroaplinkos veiksnius.

3. Suformuluoti kaimo turizmo plėtros veiksnių vertinimo metodologinius principus.

4. Sudaryti kaimo turizmo plėtros veiksnių modelį.

5. Atlikti kaimo turizmo plėtros veiksnių modelio verifikavimą.

6. Atlikti Lietuvos kaimo turizmo plėtros ir jai įtaką darančių veiksnių kompleksinį empirinį tyrimą.

**Tyrimo metodai:**

- sisteminė ir lyginamoji mokslinėje literatūroje paskelbtų koncepcijų ir išvadų analizė, grindžiama lyginamuoju, klasifikavimo, sisteminimo ir apibendrinimo metodais;

- analizės rezultatų sintezė ir loginis išvadų generavimas;
- ekspertinis vertinimas;
- koreliacinė analizė;
- antrinių statistinių duomenų analizė;
- Kruskalo ir Walliso testas (angl. *Kruskal-Wallis test*);

• tyrimo rezultatų matematinė ir statistinė analizė naudojant statistines duomenų apdorojimo programas: *SPSS* (v21.0) ir *Microsoft Excel* (2010).

### **Mokslinis naujumas ir galimos taikymo sritys:**

1. *Patikslintos kaimo turizmo ir kaimo turizmo plėtros sąvokų apibrėžtys. Vertinant mokslinėje literatūroje pateiktas kaimo turizmo sąvokos interpretacijas, galima teigti, kad kaimo turizmas apibrėžiamas skirtingai: kaip reiškinys mažai apgyvendintose (kaimo) teritorijose arba kaip veikla kaime. Kaimo turizmo išskirtinumas glaudžiai susijęs su paties kaimo specifika. Kaimo turizmas vykdomas natūralioje ar sukurtoje kaimiškoje aplinkoje, sujungia gamtos ir kultūros paveldą, o esminė jo dedamoji – vietiniai žmonės ir jų gyvenimo būdas. Disertacijoje kaimo turizmas apibrėžiamas kaip paslaugų ūkio verslas kaime, orientuotas į gamtos, kultūros, socialinių, žmogiškųjų ir finansinių išteklių panaudojimą, teigiamai veikiantis paties kaimo plėtrą, prisidedantis prie infrastruktūros kaime formavimo, užimtumo ir pajamų augimo bei verslo įvairinimo kaime. Kaimo turizmo plėtra – procesas, pasireiškiantis kaimo turizmo įmonių daugėjimu, turizmo paslaugų ir prekių paklausos didėjimu, investicijų augimu, susijusių pramonės sektorių plėtra ir užimtumo kaime didėjimu.*

2. *Išanalizuoti kaimo turizmo plėtrai įtaką darantys makroaplinkos ir mikroaplinkos veiksniai. Išskirtos penkios makroaplinkos veiksnių grupės: ekonominių, politinių ir teisinių, gamtinių ir ekologinių, socialinių ir kultūrinių bei technologinių veiksnių, kuriomis pagrindžiamas makroaplinkos poveikis kaimo turizmo, kaip nacionalinio turizmo šakos, plėtrai. Taip pat išskirtos penkios mikroaplinkos veiksnių grupės: įmonių strategijos ir konkurencijos, infrastruktūros, išteklių, paklausos ir susijusių bei remiančių sektorių, kuriomis pagrindžiamas mikroaplinkos poveikis kaimo turizmo, kaip paslaugų ūkio kaime, plėtrai.*

3. *Pateikti kaimo turizmo plėtros veiksnių vertinimo metodologiniai principai. Kaimo turizmo plėtros veiksniams nustatyti ir vertinti, siekiant gauti kiek įmanoma tikslesnius ir objektyvesnius tyrimų duomenis ir jų pagrindu daryti išvadas, reikia atlikti kokybinius ir kiekybinius tyrimus. Atliekant kokybinių tyrimą būtina pasinaudoti ekspertiniu vertinimu, paremtu specialistų žiniomis, patirtimi ir intuicija, nes svarbu gerai suvokti kaimo turizmo plėtrą, kaip nagrinėjamą dalyką. Atlikti kiekybinių tyrimą svarbu siekiant statistiškai pagrįsti makroaplinkos ir mikroaplinkos veiksnių poveikį kaimo turizmo plėtrai.*

4. *Sudarytas kaimo turizmo plėtros veiksnių modelis, nustatantis makroaplinkos ir mikroaplinkos veiksniai. Jis gali būti taikomas skirtingų šalių kaimo turizmo sektoriaus plėtrai įtaką darantiems veiksniams nustatyti ir vertinti, jų poveikio kaimo turizmo plėtrai analizei atlikti atsižvelgiant į tiriamos šalies makroaplinkos ir mikroaplinkos aspektus. Sudarytas modelis gali būti naudojamas kaimo turizmo plėtros galimybės numatyti, nes padeda nustatyti makroaplinkos ir mikroaplinkos veiksniai, darančius poveikį kaimo turizmo plėtrai. Šiame modelyje išskirti veiksniai, kurie veikia kaimo turizmo, kaip nacionalinio turizmo*

šakos ir kaip paslaugų ūkio verslo kaime, plėtrą. Tai sudaro sąlygas sprendimus priimančioms organizacijoms ir kaimo turizmo verslo atstovams objektyviau įvertinti skirtingų veiksmų poveikį, įvairių ūkio subjektų reikšmę, jų veikimo būdus ir susijusias grėsmes, numatyti kaimo turizmo plėtros skatinimo priemones.

5. *Atliktas kaimo turizmo plėtros veiksmų modelio verifikavimas.* Tyrimas leido patvirtinti išskirtų makroaplinkos ir mikroaplinkos veiksmų reikšmingumą kaimo turizmo plėtrai, padėjo nustatyti makroaplinkos ir mikroaplinkos veiksmus, ekspertų nuomone, darančius didžiausią poveikį kaimo turizmo plėtrai. Remiantis tyrimo rezultatais, modelis buvo patikslintas išskiriant, ekspertų nuomone, kaimo turizmo plėtrai didžiausią įtaką darančius veiksmus. Sudarytas kaimo turizmo plėtros veiksmų modelis buvo patikrintas ir patvirtintas jo praktinis pritaikomumas.

6. *Atliktas Lietuvos kaimo turizmo plėtros ir makroaplinkos veiksmų sąryšio empirinis tyrimas.* Tyrimas parodė, kad, ekspertų nuomone, tarp ekonomikos stabilumo, mokesčių politikos, vartotojų perkamosios galios, kaip didžiausią poveikį Lietuvos kaimo turizmo plėtrai darančių ekonominių veiksmų, ir Lietuvos kaimo turizmo plėtros dedamųjų – kaimo turizmo įmonių daugėjimo, turizmo paslaugų ir prekių paklausos didėjimo, investicijų augimo, susijusių pramonės sektorių plėtros ir užimtumo kaime didėjimo – yra statistiškai reikšmingas ryšys. Statistiškai reikšmingas ryšys nustatytas tarp Lietuvos kaimo turizmo plėtros dedamųjų ir kultūrinių ypatumų bei gyvenimo būdo (socialinio ir kultūrinio veiksmo), kraštovaizdžio (gamtinio ir ekologinio veiksmo) ir vyriausybės vykdomos turizmo politikos bei šalies užsienio politikos (politinių ir teisinių veiksmų) rodiklių. Stiprūs koreliaciniai ryšiai leidžia daryti prielaidą, kad tarp Lietuvos kaimo turizmo plėtros ir makroaplinkos veiksmų – ekonomikos stabilumo, mokesčių politikos, vartotojų perkamosios galios, kultūrinių ypatumų ir gyvenimo būdo, kraštovaizdžio, vyriausybės vykdomos turizmo politikos ir šalies užsienio politikos – gali būti ne tik koreliaciniai, bet ir funkciniai ryšiai. Jų pobūdis disertacijoje nebuvo analizuotas. Tai tolesnių mokslinių tyrimų kryptis.

7. *Atliktas Lietuvos kaimo turizmo plėtros ir mikroaplinkos veiksmų sąryšio empirinis tyrimas.* Tyrimas leido pagrįsti ryšį tarp mikroaplinkos veiksmų ir kaimo turizmo, kaip paslaugų ūkio verslo kaime, plėtros. Remiantis tyrimo rezultatais, įmonių strategijos ir konkurencijos veiksniai – konkuravimo strategijos numatymas bei strateginis planavimas ir atvirumo lygis – analizuotu laikotarpiu darė reikšmingą poveikį Lietuvos kaimo turizmo įmonių, kaip paslaugų ūkio verslo kaime subjektų, plėtros rodikliams. Iš infrastruktūros veiksmų didžiausią poveikį Lietuvos kaimo turizmo įmonių, kaip paslaugų ūkio verslo kaime subjektų, plėtrai turėjo komunikacijų infrastruktūra. Paklausos veiksniai – paslaugų kaina, nauji produktai ir paslaugos, kaimo turizmo įmonių specializacija – analizuotu laikotarpiu darė įtaką Lietuvos kaimo turizmo įmonių plėtros rezultatams. Susijusių ir remiančių sektorių veiksniai – ryšių tarp kaimo turizmo veikla užsiimančių įmonių stiprinimas, bendradarbiavimas su turizmo

informaciniais centrais ir kaimo turizmo klasterių vystymasis – analizuotu laikotarpiu turėjo svarią įtaką Lietuvos kaimo turizmo įmonių, kaip paslaugų ūkio verslo kaime subjektų, plėtrai. Teigiami mikroaplinkos pokyčiai analizuotu laikotarpiu lėmė gerėjančius Lietuvos kaimo turizmo, kaip paslaugų ūkio verslo kaime, plėtros rodiklius.

### **Disertacijos struktūra**

Disertaciją sudaro trys dalys. Pirmoje dalyje, remiantis moksline literatūra, analizuoti kaimo turizmo sampratos raidos ypatumai ir kaimo turizmo plėtros aspektai, išnagrinėti kaimo turizmo plėtrai įtaką darantys makroaplinkos ir mikroaplinkos veiksniai. Antroje dalyje sudaryta kaimo turizmo plėtros veiksnių nustatymo ir vertinimo metodologija ir jos pagrindu sukurtas kaimo turizmo plėtros veiksnių modelis. Atliktas modelio verifikavimas. Trečioje dalyje atliktas Lietuvos kaimo turizmo plėtros ir jai įtaką darančių veiksnių kompleksinis empirinis tyrimas.

### **Tyrimo apribojimai**

Atliekant Lietuvos kaimo turizmo plėtros ir jai įtaką darančių veiksnių kompleksinį empirinį tyrimą analizuoti tik didžiausią įtaką, ekspertų nuomone, turintys makroaplinkos veiksniai ir jų poveikis Lietuvos kaimo turizmo plėtrai. Makroaplinkos veiksnių poveikis kaimo turizmo, kaip nacionalinio turizmo šakos, plėtrai pagrįstas koreliaciniais ryšiais. Funkciniai ryšiai tarp Lietuvos kaimo turizmo plėtros ir makroaplinkos veiksnių analizuoti nebuvo.

Atliekant šį tyrimą analizuoti tik statistiškai reikšmingi (remiantis Kruskalo ir Walliso testo rezultatais) kaimo turizmo įmonių, kaip paslaugų ūkio verslo kaime subjektų, plėtros ir mikroaplinkos veiksnių pokyčių ryšiai.

Lietuvos kaimo turizmo plėtros ir jai įtaką darančių veiksnių kompleksinį empirinį tyrimą riboja kai kurių duomenų neprieinamumas. Skirtingi statistiniai rodikliai pradėti rinkti ir pateikti Lietuvos statistikos departamento, Valstybinio turizmo departamento, Lietuvos Respublikos aplinkos ministerijos ir Lietuvos Respublikos užsienio reikalų ministerijos duomenų bazėse skirtingais metais.

### **Disertacijos apimtis**

Disertaciją sudaro 166 puslapiai (149 puslapiai be priedų). Darbe pateiktos 36 lentelės, 30 paveikslų, 8 priedai. Panaudota 250 mokslinės literatūros šaltinių.

### **Disertacijos tyrimų rezultatų publikavimas**

Disertacijos tyrimų rezultatai pristatyti Lietuvos ir tarptautinėse mokslinėse konferencijose, paskelbti pripažintuose Lietuvos ir užsienio mokslo leidiniuose. Tyrimo rezultatai paskelbti 6 mokslinėse publikacijose.

UDK 338.48 – 44(1–22)(474.5)(043. 3)

SL344. 2017-06-23, 2,5 leidyb. apsk. I. Tiražas 50 egz.

Išleido Kauno technologijos universitetas, K. Donelaičio g. 73, 44249 Kaunas  
Spausdino leidyklos „Technologija“ spaustuvė, Studentų g. 54, 51424 Kaunas