

Piotr Gabryjończyk¹✉, **Iryna Kudinova²**

¹Warsaw University of Life Sciences

²National University of Life and Environmental Sciences of Ukraine

Motives for undertaking rural tourism activity and its economic and social benefits – comparison of Polish and Ukrainian theoretical perspective

Summary. The paper presents a comparison of the Polish and Ukrainian theoretical approaches to the motives for undertaking tourism activity in rural areas and its economic and social benefits. Based on the review of the Polish and Ukrainian literature of the subject, it presents the reasons for development of tourism in rural areas presented in both countries, the perceived profits associated with it, as well as the tasks of local administration expected in supporting it. A model of the overall impact of tourism (including rural tourism) on economic development was also presented for both countries. Finally conclusions were presented, regarding similarities and differences in approach to the above issues in both countries, as well as the resulting opportunities for cooperation.

Key words: rural tourism, rural territories, motives, economic and social benefits

Introduction

The role of the tourism industry has grown considerably in recent decades, as tourism is today not only a way of recreation and leisure, but also one of the significant sources of budget replenishment. Simultaneously with the development of the tourism industry, many new forms of tourism were formed, which eventually took their niches in the tourist market. One of those forms is rural tourism – a promising direction and an innovative approach (especially in Ukraine) in the tourism industry, which creates opportunities for solving a number of rural development problems.

The idea of rural tourism, as a type of economic activity, is not only to meet the needs of potential users (tourists), but also to make a significant impact on many other segments of the rural economy through diversified social and economic ties. However, this issue, due to the many factors that distinguish Polish and Ukrainian social and economic specificity, as well as the various level of development of the phenomenon of

✉piotr_gabryjonczyk@sggw.pl

rural tourism, is distinguished differently in the scientific discourse and presented in not so similar way in the literature of each of the both countries mentioned above.

Therefore the main purpose of this paper is to identify and present a theoretical perspective on the general motives and benefits of rural tourism development from the point of view of Ukrainian and Polish researchers. This should help in understanding the essence of national expectations expressed in relation to the rural tourism, and thus facilitate international cooperation in its joint development.

Research methods

In Poland, the traditions of rural leisure are very long, but on a massive scale rural tourism became the object of researchers' interest since the 1990s. From the middle of this decade, the first professional publications on this subject were available, while in the following years scientific interest in the topic systematically increased, which was also linked with the growing possibilities of external financial support for tourist activities in the rural areas from European funds. For this reason, the current literature on rural tourism (including its benefits) is quite numerous, and the phenomenon itself now often becomes the object of more detailed, partial analyzes of selected issues or particular, local areas in the country and their tourist development. Among the main Polish researchers dealing with the essence and development of rural tourism should be pointed out M. Drzewiecki, J. Sikora, J. Majewski, A. Wiatrak, K. Krzyżanowska, A. Balińska, I. Sikorska-Wolak, M. Roman and J. Zawadka.

In Ukraine, on the other hand, practical, theoretical, and methodological aspects of the formation and development of rural tourism have just recently received extensive coverage in the scientific works of economists. The work of Ukrainian scientists such as P. Gorishevsky, Y. Zinko, L. Zaburanna, V. Vasiliev, M. Rucinski, N. Kudła, M. Kostritsa and others are devoted to the research of development and functioning of rural tourism. However, the opportunities for the formation and organization of rural tourism in the present conditions are still not fully developed and require further research.

The methodological basis of the paper was the systematic approach to the Polish and Ukrainian studies that describe processes and phenomena of rural tourism. Thus, the main basis of the article was the analysis of previous studies and publications devoted to the motives and benefits of tourism development in rural areas.

Results and discussion

Rural tourism, taking into account trends in its development, should be viewed as a type of socio-cultural activity and as an industry that produces services necessary to meet the needs arising from the journey. It is an important area of the economy, the further development, and improvement of which should contribute to the increase of income of the state. The key function of rural green tourism in the economy of subjects of the domestic agricultural sector is the differentiation of operational activities and increase on this basis the effectiveness of management, which forms a powerful basis for solving socio-economic problems in rural areas. According to Ukrainian perspective,

the following three main socio-economic effects arises as a result of the expenditures incurred by tourists, who use the rural product of the tourist industry¹:

- the income of the travel company increases;
- the demand from the tourist sector of the economy for goods and services of adjacent and supporting industries is increasing;
- the personal income of the rural population, directly or indirectly related to tourism, which causes an increase in consumer demand, is increasing.

Moreover, rural tourism also provides employment of rural population and demographic stability, reduces labor migration from village to city, develops social infrastructure of the village and improves the standards of housing, streets and villages. Therefore it may be claimed that rural tourism is one of the means of increasing income of the rural population, as well as the component of the integrated development of rural areas and rural infrastructure.

The Polish perspective, although largely coincides with the benefits noticed in Ukraine, seems to be more detailed, emphasizing not only the basic financial dimension of rural tourism development, but also its numerous less obvious advantages in many areas. Benefits of developing tourism in rural areas according to Polish assumptions are presented in Table 1.

Table 1. Economic and social benefits of tourism development in rural areas

Economic sphere	Social sphere
<ul style="list-style-type: none"> • Stimulating economic initiatives • Entrepreneurship development • Diversification of business activities (multi-functional development) • Use of local resources (including work) • Better use of undeveloped rural areas • Capital transfer (tourists' expenses and external investments) • Redistribution of income (additional income for residents) • Improvement and development of technical and social infrastructure • Increase of competitiveness of rural areas 	<ul style="list-style-type: none"> • Increased social awareness • Increased regional awareness • Diversifying the social structure • Increased tolerance, acceptance of differences • Change of attitude • Ennoblement of the village inhabitants and the rural lifestyle • Improving the conditions and quality of life • Revaluation of the value of local cultural heritage and change of attitude towards it • Development of regional culture and cultivating customs • Protection of monuments • Cultural education • Reducing migration from rural areas

Source: own study based on I. Sikorska-Wolak: Turystyka wiejska jako wielowymiarowe zjawisko i jako przedmiot badań naukowych, (in:) I. Sikorska-Wolak (ed.), Ekonomiczne i społeczne aspekty rozwoju turystyki wiejskiej, Wydawnictwo SGGW, Warszawa 2008, p. 15.

¹ V.V. Bondar: Agricultural tourism as a type of diversification development of agricultural entrepreneurship. "Bulletin of the Chernihiv State Technological University" 2014, No. 56, pp. 89-95; A.O. Kravchuk: Rural tourism as a strategic direction of diversification of operational activities of the subjects of the agrarian sector of Odessa Oblast. "Economic Thought" 2014, Vol. 18, No. 3, pp. 45-51.

In the Polish perspective it is noticeable to emphasize the very large impact of tourism on the social sphere of the rural areas. This is due to the fact that tourism – undoubtedly an economic and spatial phenomenon – is primarily a social one because human is its basic subject². The social dimension of the relationship arising in rural areas between locals and newcomers is very often emphasized by the researchers³, who claim that rural tourism has, first of all, the social dimension, which due to the limited reception space and relations prevailing in it, creates opportunities for establishing personal contacts with the inhabitants⁴. Evidence of this can be the voices of the residents dealing with the organization of recreation in the countryside, emphasizing the possibility of shaping specific character traits (patience, openness to others), meeting new, interesting people, mutual exchange of experience and acquiring and expanding knowledge from many tourist-related disciplines⁵. Of course also in Poland the economic benefits of developing tourism functions seem particularly important in the context of rural areas, affected by many demographic and financial problems. Also in the countryside may be observed the occurrence of the so-called tourism multiplier effect⁶. Moreover, it has been proven that there is a statistically significant positive correlation between the indicator for the development of the tourist function and the socio-economic situation of rural areas⁷. However, among the main benefits from the rural tourism, next to the increase in income level of inhabitants, things like improving the level of education (also understood as a general desire to develop and expand knowledge), greater opportunities for social advancement, modernization and change of family model (increase of the social role of women), modification of local culture (rather in a positive context) and change of attitudes of residents, especially young, are emphasized⁸. What is interesting, Polish authors also notice that tourism in rural areas is generally associated with a lower financial burden for tourists themselves (in present times, as well in the past), and therefore also brings economic benefits to tourism participants⁹.

² K. Przecławski: Społeczny wymiar turystyki, (in:) Turystyka w ujęciu podmiotowym i przestrzennym. Człowiek – przestrzeń – przedsiębiorstwo, G. Gołębcki (ed.), Akademia Ekonomiczna w Poznaniu, Poznań 2006, p. 14.

³ J. Sikora: Agroturystyka. Przedsiębiorczość na obszarach wiejskich, C.H. Beck, Warszawa 2012, p. 66-67.

⁴ I. Sikorska-Wolak: Turystyka wiejska jako wielowymiarowe zjawisko i jako przedmiot badań naukowych, (in:) I. Sikorska-Wolak (ed.), Ekonomiczne i społeczne aspekty rozwoju turystyki wiejskiej, Wydawnictwo SGGW, Warszawa 2008, pp. 11-13.

⁵ K. Krzyżanowska, I. Sikorska-Wolak: Doradztwo rolnicze w stymulowaniu rozwoju agroturystyki, [in:] Komunikowanie i doradztwo w turystyce wiejskiej, K. Krzyżanowska (ed.), Wydawnictwo SGGW, Warszawa 2013, pp. 151-152.

⁶ J. Sikora, op. cit., pp. 45-49, 66.

⁷ It is 0,5 for $p \leq 0,001$. More in J. Kosmaczewska: Turystyka jako czynnik rozwoju obszarów wiejskich, Bogucki Wydawnictwo Naukowe, Poznań 2013.

⁸ K. Przecławski, op. cit., pp. 16-17.

⁹ I. Sikorska-Wolak: Kształtowanie funkcji turystycznych obszarów wiejskich – potrzeby i możliwości, (in:) I. Sikorska-Wolak (ed.), Turystyczne funkcje obszarów wiejskich, Wydawnictwo SGGW, Warszawa 2009, pp. 23-34; M. Drzewiecki: Agroturystyka. Założenia – uwarunkowania – działania, Świadectwo, Bydgoszcz 1995, p. 50.

When considering the motives for undertaking rural tourism activity from the Polish and Ukrainian perspective, one can also notice some differences. Reasons for the establishment and development of rural tourism in Ukraine and Poland are presented in Table 2.

Table 2. Motives for the establishment and development of rural tourism in Ukraine and Poland

Ukraine	Poland
<ul style="list-style-type: none"> • Increase in rural population's incomes • Ability to generate additional income • Doesn't require additional training and significant investments • Powerful historical, cultural, recreational potential • Revival of folk customs, crafts, traditions • Self-realization of workers in rural areas • Opportunities for additional employment • Possibilities of differentiation of agrarian business • Doesn't require registration as an entity • Raising the cultural level of the population • Popularization of agriculture • Possibilities of expanding individual contacts 	<ul style="list-style-type: none"> • Farmers' willingness to balance farm incomes • Unemployment among the residents of rural areas • Free living space in country houses • Government tourism development programs (part of programs of sustainable and multi-functional rural development) • Attractiveness of the natural values of rural areas • Interesting cultural heritage of the Polish countryside • The possibility of direct sale of agricultural products, local industry products and production of craft workshops for tourists • Developed technical and social infrastructure • Personal satisfaction of the rural population related to contact with urban residents • EU subsidies for tourist village development programs • Support from local authorities (communes) • Acceptance and involvement of residents • Promotion of regional and local tourist products • Capital resources of the commune and society • Development of innovative agriculture

Source: own study based on I.P. Kudinova: The Role of Rural Tourism in Improving the Competitiveness of Rural Areas, „Scientific Bulletin of NUBiP of Ukraine” 2015, part 1, pp. 111-114; B. Sawicki: Agroturystyka w aktywizacji obszarów wiejskich, AR Lublin, Lublin 2007, pp. 109-110.

It can be seen that both Polish and Ukrainian motives for the establishment and development of rural tourism are quite similar - in both countries economical and social aspects are presented in, generally, analogous way. Yet, again Polish perspective seem to be more detailed and various, presenting broader social approach. In addition, the Polish motives distinguish the existence of numerous possibilities of external support for tourism activity in rural areas. Thus, it may be concluded that rural tourism in Poland is nowadays treated more as a possibility (among other solutions), than necessity, while in Ukraine it is rather concerned as an opportunity to solve numerous rural problems. Therefore it should be emphasized that from Ukrainian perspective rural tourism could become a strategy to overcome poverty in rural areas. That is why, in developing coun-

tries, rural tourism is supported and encouraged by the state, access to activities in this area is as simple as possible, and entities providing services in this area receive all kinds of preferences, including tax.

The development of rural tourism should be the object of attention of regional and district administrations, united territorial communities, an attractive field of activity for dynamic and creative rural families. It requires a well-balanced integrated scientific approach, proper marketing support, good educational and informational support. The complex of tasks of territorial communities for the development of rural tourism in Poland and Ukraine is presented in Table 3.

Again, it can be seen that, despite some converging areas, approaches differ slightly in both countries. Creation of the external image of rural areas and infrastructure devel-

Table 3. The complex of tasks of territorial communities for the development of rural tourism in Ukrainian and Polish perspective

Ukraine	Poland
<ul style="list-style-type: none"> • Increasing the living standards of the rural population (support for raising the level of the development of the rural territory as a sphere of activity and life of inhabitants, delineation of the policy of support of agriculture and rural development) • Employment of rural population (stimulation of rural employment outside the sphere of agricultural production, including rural tourism, folk arts and crafts, services enterprises, collection and processing of wild berries and mushrooms, medicinal raw materials etc.) • Development of rural infrastructure (first of all, roads, telecommunications, communal services, education and health care) • Social development of the village (creation of conditions for social development of the village, sustainable motivation to the social responsibility of business in rural areas) • Formation of attractive image of rural territories (increasing the level of attractiveness of living in rural areas, implementing a program of state support for young workers involved in work in rural settlements) • Increase revenue (equal conditions for support of agricultural producers, regardless of their type, size, and the form of ownership and management) 	<ul style="list-style-type: none"> • Shaping the awareness of the local community regarding the existence and importance of tourist values of the environment, as well as ecological knowledge • Popularizing the development of rural tourism (by showing its benefits) • Activation of the population in non-agricultural activities (especially in tourism) • Supporting investments aimed at improving the technical infrastructure of rural areas (water supply, sewerage, sewage treatment plants) • Supporting initiatives for the development of tourist infrastructure (trails, paths, playgrounds, tourist equipment rentals) as well as care for the condition of local heritage • Organization of local events with use of the village heritage (festivities, fairs, concerts, exhibitions) • Creating a thoughtful, positive image of rural areas, including permanent public care of cleanliness and aesthetics • Obtaining external financial support for projects related to broadly understood touristic rural development • Promotional campaigns that increase the visibility of rural areas and attract external tourist traffic

Source: own study based on L.O. Ivashina: The Role of the Joint Territorial Communities in the Development of Rural Green Tourism, "State Administration and Local Self-Government" 2017, Issue 3 (34), pp. 143-148; J. Zawadka: Ekonomiczno-społeczne determinanty rozwoju agroturystyki na Lubelszczyźnie (na przykładzie wybranych gmin wiejskich), Wydawnictwo SGGW, Warszawa 2010, p. 49.

opment remain common issues, though not necessarily in the same dimension. From the Ukrainian perspective, basic investments seem to be more urgent (roads, education, health), while in Poland the main area of interest of the authorities remains solutions that decide on the development of already specialized facilities, also in the tourist context. Of course, both sides set the starting point for raising the level of development and life of the inhabitants, however, a slightly different starting point for the above-mentioned actions is noticeable. What's more, in the Polish perspective you can see definitely more activities supporting solutions in the field of preservation and popularization of cultural heritage (conservation of monuments, organization of events), as well as spatial order – undoubtedly these are costly activities, often long-lasting and not allowing to achieve immediate, visible results, thus harder affordable comparing with more basic needs of local societies. Finally, in the Polish perspective, one can notice a clearer emphasis on supporting grassroots initiatives of the inhabitants themselves, while the Ukrainian vision seems to be more based on top-down activities, making the authorities, not citizens, primary responsible for the effects of actions supporting rural tourism.

It turns out that the most convergent area in the context of the Polish and Ukrainian view is the perception of the model of general impact of tourism (including rural tourism) on economic development. This relation was presented in Table 4.

The benefits of rural tourism are most often perceived through the prism of the measurable value of the financial resources associated with it, which come to the given

Table 4. Polish and Ukrainian model of the overall impact of tourism on economic development

Main economic benefits related to rural tourism		
<ul style="list-style-type: none"> • Contribution to GDP • Influence on the balance of payments 	<ul style="list-style-type: none"> • Income in taxes • Receipt of foreign currency 	<ul style="list-style-type: none"> • Infrastructure investments • Multiplier effect
Expenditures that precede the consumption of tourist services	Expenditures during the period of consumption of tourist services	Expenditures after consumption of tourist services
<ul style="list-style-type: none"> – Tourist agency services – Purchase of consumer goods – Communication services – Domestic services – Insurance, banking and other services 	Main expenditures: <ul style="list-style-type: none"> – Transport services – Accommodation services – Food services – Excursion services Additional expenditures: <ul style="list-style-type: none"> – Fun – Communication services – Purchase of goods, souvenirs 	<ul style="list-style-type: none"> – Communication services – Domestic services
 <p>Tourist's movement (home – destination – home)</p>		

Source: own study.

place thanks to visitors – this is because it is the easiest to recognize indicator of changes taking place¹⁰. Although the importance of this element undoubtedly remains considerable, the most important direct positive effects of tourism for the local economy are its changes in the area of the labor market, entrepreneurship, infrastructure and the local budget¹¹. Serving tourists arriving in the region requires meeting their needs, which can be realized through specific services and goods, offered in turn by properly prepared people. As a result, both activation (although often only seasonal) and professional diversification of local communities occur¹². Importantly, this creates a kind of self-propelling mechanism: tourists and the people serving them generate demand for further infrastructure development, which in turn results into the emergence of new business entities and the employment of employees implementing this expansion. This process is impossible without the necessary further goods and services, usually very diverse, needed both to implement the investment and to meet the needs of people implementing them, which results in a further increase in employment¹³. This process is connected with the idea of tourism multiplier, which bases on acceleration theory, originated in the broadly understood expenses incurred by tourists on their travels, which subsequently cause a cascade effect within the local economy¹⁴. Moreover, tourist participants incur expenses related to a specific trip not only during tourist stays, purchasing specific goods and services, but also when preparing to leave the house, as well as after returning from rest. This specificity of tourist trips is universal, and thus is identical for both the Polish and Ukrainian rural tourism.

Conclusions

The conducted analyzes showed that the Polish and Ukrainian perspective in terms of motives for undertaking tourism activity in rural areas and its economic and social benefits, despite some common elements, remain somewhat different. Undoubtedly both countries have a very strong potential for the development of rural tourism, however, due to the changes already occurred in Poland, it may be treated as an innovative approach to the development of countryside only rather from the Ukrainian point of view.

Of course Poland and Ukraine encounter problems in developing rural tourism, but their character remains slightly different. In Ukraine the greatest obstacles to the development of tourism in the countryside are traditionally considered to be the transport distance of the centers of rest - poor communication (roads in the countryside are in

¹⁰ G. Gołembski (ed.): *Przedsiębiorstwo turystyczne. Ujęcie statyczne i dynamiczne*, PWE, Warszawa 2007, pp. 15-16.

¹¹ A. Panasiuk (ed.): *Ekonomika turystyki i rekreacji*, Wydawnictwo Naukowe PWN, Warszawa 2011, p. 56; K. Gralak: *Funkcja turystyczna i jej znaczenia dla rozwoju lokalnego i regionalnego*, (in:) *Sposoby wykorzystania dóbr kultury dla potrzeb rozwoju funkcji turystycznej na Mazowszu przy wsparciu z funduszy strukturalnych*, H. Powęska (ed.), Wydawnictwo SGGW, Warszawa 2008, pp. 30-31.

¹² W. Gaworecki: *Turystyka*, PWE, Warszawa 2003, pp. 215, 409.

¹³ G. Gołembski (ed.), *op.cit.*, pp. 15-16; W. Gaworecki, *op.cit.*, p. 409.

¹⁴ K. Gralak, *op.cit.*, p. 31.

a very neglected state, recreational facilities (inconsistency with the needs of modern tourists), low level of service provision, the lack of integrated tourist offers containing products oriented to a new type of tourist, low marketing, insufficient methodological support and lack of targeted actions, there is strong competition from neighboring countries that offer much better combination of infrastructure and products¹⁵. Therefore, in the context of modern conditions, the rural tourism development forms the fundamental framework for addressing the most important socio-economic issues of rural areas of Ukraine: overcoming unemployment, promoting employment, raising incomes and quality of life for rural residents. In turn, in the Polish perspective, rural tourism seems to be an additional development opportunity, in line with the idea of multifunctionality of rural areas. Economic problems, although important, do not obscure the sphere of social benefits taken very seriously (both among motives and benefits), and the development of infrastructure focuses on more specialized investments in terms of tourism or technology, aimed not only at raising the living standards of local residents, but – often above all – to increase the tourist attractiveness of particular areas. Moreover, in Polish perspective availability of external financial funds and stress on bottom-up initiatives is much more often presented.

Nevertheless, the strategic goal of rural tourism development both in Ukraine and Poland is to create a national tourism product that is competitive on the domestic and international markets and can meet the needs of our compatriots and foreigners as much as possible. As well as the expansion of domestic tourism and the constant growth of volumes of inbound tourism, ensuring the integrated development of recreational areas and tourist centers, taking into account the socio-economic interests of their population. An unconditional factor in the successful development of rural tourism is advertising and information publications that will allow rural tourism to become a powerful factor in the revival of the village and the economy as a whole.

Understanding the differences in Polish and Ukrainian perceptions of rural tourism, the motives and benefits of its development, should allow better and more effective cooperation between the two countries, conducive to the joint development of this form of recreation. Polish experiences and export of know-how can significantly facilitate the operations of Ukrainian entities and help them to avoid many mistakes or situations that occurred during last 25 years of rural tourism development in Poland. Nevertheless, in both countries further research on innovative concepts of the formation of rural tourism, as well as effective tools and mechanisms to increase its profitability and increase social protection of the population of rural areas, is needed.

¹⁵ More in: M.V. Beschastnaya, P.A. Gorishevsky, T.P. Kala-Dubinjuk, I.P. Kudinova, O.A. Lokutova, O.Yu. Panasyuk, M.Ya. Rutinsky, L.H. Rybak, V.V. Samsonova, L.M. Sokol, V.V. Trilly, V.P. Vasilev, O.O. Voloshinsky-Nizhyn, Yu.V. Zinko: Rural green tourism to improve the skills of specialists in the field of rural green tourism. Teaching manual, PE Lysenko MM, Kiev 2016.

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