ASSESSMENT OF TOURISM INDUSTRY CLUSTERING POTENTIAL

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Abstract: *In any country the successful strategic development of the tourism industry aims at economic growth, as it helps to reduce unemployment and increase national income, as well as to make tourism attractive. Long-term experience has shown that both isolated subjects of tourist businesses and those of public administration are totally ineffective. Achieving good results requires a common development strategy with specific objectives for each of the subjects. It is for this goal that tourist clusters are created in the world community. The present study provides analysis of macro-, meso- and microenvironment to determine the potential of the tourism industry clustering in the Zaporizhzhia region, Ukraine. After making the analysis of microeconomic environment of the tourism industry in the region generally suggests that of five tourism clustering potential components, four of them have a high level (A) and one has intermediate (B), meaning that the Zaporizhzhia region possesses all the potential to create a competitive tourism cluster. The obtained data will make it possible to form a regional tourism development program, to identify gaps in infrastructure management, to do comprehensive research of whether it is effective and appropriate to establish cluster organizations on any territories.*

Keywords: *Tourism Industry, Tourist Cluster, Economy Growth, Macroeconomics, Microeconomics, Meso-economics, Evaluation of Clustering Potential.*

JEL Classification: *R58.*

Introduction

In today's global competition, the association of enterprises based on cluster approach is one of the most important priorities in tourism industry development.

The premises of the clusters theory can be found in the works of Alfred Marshall. Thus, in his book "Principles of Economics", first published in 1890, he considers issues of external specialized spatial distribution (Marshall, 1920). The most popular, however, are the works by M. Porter. In his work "International Competition", he gives the well-known definition of the cluster: "A cluster or industrial group is a group of geographically neighboring interconnected companies and related organizations operating in a certain area, characterized by common activities and complementary to each other" (Porter, 1990: 258).

The cluster approach founder in Ukraine, S.I. Sokolenko, offered the following definition: "Cluster is a voluntary branch and territorial association of the companies that work closely with local authorities to improve the competitiveness of its products and to ensure the economic growth of the region" (Sokolenko, 2002). Thus, the cluster concept provides a new vision of the national and regional economy; it also defines the new role of companies seeking to improve their competitiveness. Such a great importance of the clusters leads to a new management paradigm, the need for which is still underestimated.

Data from World Tourism Organization reports suggest a significant economic growth the tourism industry is experiencing over the past fifty years. According to UNWTO Tourism Highlights Report (UNWTO, 2015), the contribution of tourism to the global GDP is 9%, with every 11th worker engaged in tourism and services. The increase in foreign tourists' number is a considerable amount – from 25 million in 1950 to 1,133 million in 2014 (that is more than 45 times in 64 years). The increase in foreign tourists' number, as UNWTO predicts, could reach 1.8 billion people by 2030.

1 Statement of a problem

Tourism is one of the most dynamic developing industries in the world. Today the Industrial Cluster theory is, according to American scholars, the leading model of economic development. Despite this, the tourism industry has little, if any, attention in the scientific literature on the industrial cluster theory. At the same time, in the United States and around the world, those who practice tourism development do experiments with the cluster concept, sometimes innovatively, but generally haphazardly.

M. Porter's Industrial Cluster Theory can provide meaningful and productive basis for the analysis and development of the tourism industry.

The advantages of clustering for business in particular and the economy in general are as follows:

- Companies can pool their capabilities in order to reduce costs and offer competitive market price that each of the subjects could not afford individually.
- Companies can widen knowledge. This provides the supplier companies with deeper supply chains and allow them to exploit the potential of the knowledge gained in the cooperation
- Companies can enhance saving potential of scale through joint purchases of bulk discounts and joint marketing costs.
- Companies can strengthen social and other informal links that can result in creating new ideas and new businesses.
- Companies can improve information flows within the cluster, by, for example, recommending the cluster partners as reliable businesspersons.

Clustering is a key factor in economic growth in cities and regions. It is but the only way to stimulate regional economic growth (A Practical Guide to Cluster Development, 2006).

A group of authors T. Vereshchagina, G. Haliullina, L. Belkowa (Vereschagina, Galiullina, Belkova, 2010) proposed the methods, which have as their theoretical framework the polarized development theory, the cluster formation principles and the method of regional ranking according to statistics. The given methods can show the relationship between two potentials – region clustering and its intangible assets. The calculations based on peer assessment techniques reveal the stock, financial and raw material potential of the region that can be used to determine potential of the region industries clustering (the article studies the methods to form steel industry clusters). With the tourist industry referring to the service sector, creating additional gross domestic product in this area is significantly different, for it is formed on somewhat different principles than those in industrial areas.

The scheme of companies' selection and their inclusion in the cluster, proposed in the above article (Batalova, 2013), makes it possible to determine the extent of the company and involves the need to expand the cluster organizations in order to improve competitiveness and to display this industry on an international level. Analysis of industrial clusters competitiveness (Ovcharuk, 2014) involves the definition of the analysis purposes, information evaluation and analysis of regions itself and of cluster formations in them. It is also necessary to choose the base for comparison, to establish a list of parameters to evaluate the industrial clusters competiveness, to rate competitiveness by determining the competitive of level of enterprises-participants (calculation factor of competitiveness of the enterprise). However, the issue of how to implement the cluster approach in tourism businesses and how to ensure its effectiveness, especially given the economic development of Ukraine, remains insufficiently investigated today.

The study aims to establish the potential of the tourism industry clustering by analyzing the macro-, meso- and microenvironment, with taking into account the specific conditions of the tourism industry. Achieving this goal will create a regional development program for the tourism industry in the region, to identify gaps in infrastructure management; it will provide an opportunity to conduct comprehensive studies of the efficiency and expediency of any territory cluster associations.

2 Methods

There are not so far any special methods to evaluate clustering potential. As local scientists EV Khristenko, T.V.Pulina put it: "Clustering is the presence of competitive advantages of industries, businesses, infrastructure organizations in the region territory and the possibility to combine and use these advantages in order to improve regional competitiveness" (Khrystenko, Pulina, 2015). We will assess macro-environment, that is a country's position among global competitors in the field, by using methods of analysis, synthesis, deduction and induction. To evaluate tourism and transport infrastructure, the method of the World Economic Forum (WEF) will be applied.

To determine the potential of the tourism industry clustering potential in the Zaporizhzhia region, the methods of M. Vinokurova shall be applied (Vinokurova, 2006). The methods and techniques to estimate the leading industries potential (Pulina, 2014), that N.V. Vinokurova proposes, is to calculate coefficients of localization, implementation per person and specialization of industrial sectors.

Localization of tourist travel services in the travel industry is analyzed in different way than that in industries. Localization of tourism in the region is differentiated as defining localization of the travel agent and tour operator activities. The relevant factors are the ratio of the travel agent and tour operator's activity share in the structure of tourism to the tour operator and travel agent's activity regional share in the structure of the country. Coefficient of localization for tour operator activity in the region is calculated according to the above formulas by selecting the index value of travel packages, sold by travel operators, individuals and entities in the region.

Coefficient of sales per person of tourist company is calculated as the ratio of the share, that the regional tourism has in the country's certain economic activity structure, to the proportion of the region population in the country population. The coefficient of specialization can be computed only separately for travel agency and tour operator

activities. The coefficient of specialization of a tour agency activity is defined as the ratio of the region travel agent share travel in the country to some of the gross regional product (GRP) in GDP of the country. The relevant formula can be used to calculate a coefficient of specialization for tour operators' activities.
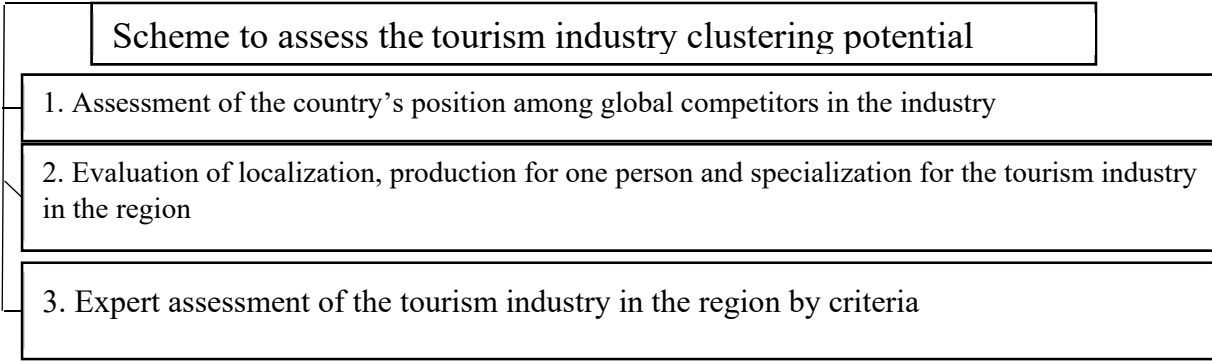
Herewith, if the calculated coefficients are close to or greater than one and tend to increase, clusters are possible to be created in these areas (Vinokurova, 2006). Currently, there are different opinions on how the obtained values of these coefficients may be interpreted. E. Bergman (Bergman, 2016) believe it is the coefficient of localization, which is more than 1.25, that signifies the specialization of the region. On identifying clusters in Sweden, Braunhelm P. and B. Karlsson (Bergman, 2016) used a coefficient with the limit value of 1.3.

For coefficients of localization for production per person and for specialization, M.V. Vinokourova offers a minimum limit value of one (Vinokurova, 2006). It is also necessary to track the dynamics of these coefficients that indicates the cluster possible growth (Khrystenko, Pulina, 2015).

To analyze what potential the microenvironment clustering of the regional tourism has, we can estimate (applying M.V. Vinokurova methods (Vinokurova, 2006)) the sources of tourism competitive advantages in the Zaporizhzhia region, namely the availability of production factors, domestic market demand, the availability of competitive industries to supply the related industries and organizations, as well as the international market competition. 300 experts were invited to evaluate microenvironment by expert assessments.

Fig. 1 shows a generalized scheme of methods and technique to assess the tourism clustering potential in the region.

Fig. 1: Technique to estimate the tourism clustering potential in the region

Scheme to assess the tourism industry clustering potential

1. Assessment of the country's position among global competitors in the industry

2. Evaluation of localization, production for one person and specialization for the tourism industry in the region

3. Expert assessment of the tourism industry in the region by criteria

Source: [proposed by authors]

3   Problem solving

The study of Ukraine's position among global competitors in the industry (World travel and tourism council, 2015) showed that international tourism spending is a key component of the contribution to GDP and amounted to 34.6 billion UAH in 2015. In 2015, the tourism industry directly supports 214,500 jobs (1.2% of total employment). Employment in tourism is expected (World travel and tourism council, 2015) to grow by 3.3% in 2016. In 2015, the tourism industry received investments in the amount of 5.4 billion UAH, or 2.0% of total investments. Expenses for travel and leisure (inbound and domestic) constitute 93.3% of total expenditure compared with 6.7% for business

travel. The cost of business travel is expected (World travel and tourism council, 2015) to grow by 2.3% in 2016. If we compare the total and direct contribution of tourism to GDP in Europe, it should be noted that Ukraine is not a leader on these indicators, that the tourism industry of our country requires improvement, development and investment.

If you compare direct and total contribution of tourism to the GDP in Ukraine and the average world and European indicators, the calculation results, shown in Tab. 1, suggest a significant lag in the tourism industry development of Ukraine, as well as its extremely low yield in comparison to that of average world and European indicators.

Tab. 1: Calculation results to indicate how the direct and total tourism contribution to GDP in Ukraine deviate from the average world and European indicators

Direct contribution of tourism to GDP, in $ billion		The total contribution of tourism to GDP, in $ billion	
World average	18.5	World average	55.7
European average	14.9	European average	40.3
Ukraine	1.3	Ukraine	5.1
Ukraine's index deviation from the world average	-17.2	Ukraine's index deviation from the world average	-50.6
Ukraine's index deviation from the European average	-13.6	Ukraine's index deviation from the European average	-35.2

Source: Calculated by the authors according to the data (UNWTO, 2015)

To assess quality and capacity of travel infrastructure and tourism in Europe (UNWTO, 2015) WORLD TRAVEL AND TOURISM COUNCIL widely uses the World Economic Forum (WEF) methodology, which involves evaluating territories and assigning them the rank of infrastructure development, for the development criteria of tourism infrastructure, infrastructure, air and land transport. By the tourism and transport infrastructure development Eastern Europe occupies 5th place, behind North America and Western, Northern, Southern, Central Europe.

The country is at risk of not performing the basic prediction of economic benefits due to lack of infrastructure and investment. 3.7 score of 7 indicates the need for the transport routes development and air transport reformation.

Tourism in the Zaporizhzhia region needs development, given the favorable geographical location of the region and its natural, historical and cultural values. One of the ways to increase the region competitiveness is tourism, especially with such unique natural resources – the Dnieper River and the island of Khortytsia.

The next step in assessing the clustering potential of the Zaporizhzhia region is to analyze production factor per person as well as coefficients of specialization and localization (Tab. 2).

Tab. 2: Coefficients of sales, specialization, localization per person for tourism business in the Zaporizhzhia region

Indicator	2011	2012	2013	2014	2015
Coefficients of sales per person for tourism business in the Zaporizhzhia region	0,5431	0,5242	0,9731	0,5703	0,4189
Coefficients of sales per person for tour agents in the Zaporizhzhia region	1,222	1,1943	1,3689	1,5027	0,7192

Coefficients of sales per person for tour operator activities in the Zaporizhzhia region	0,1714	0,0978	0,0712	0,0639	0,0242
Coefficients of specialization for tourism businesses in the Zaporizhzhia region	0,5681	0,5288	1,0208	0,5295	0,5398
Coefficients of specialization for the tour agent activity in the Zaporizhzhia region	1,2782	1,2049	1,4360	1,3951	0,9267
Coefficients of specialization for tour operator activity in the Zaporizhzhia region	0,1793	0,0987	0,0747	0,0593	0,0312
Coefficients of localization for tour agent activity in the Zaporizhzhia region	2,2502	2,2785	1,4067	2,6349	1,7167
Coefficients of localization tour operator activity in the Zaporizhzhia region	0,3157	0,1866	0,0732	0,1120	0,0578

Source: Calculated by authors

There is a reduction in tourist flows in the Zaporizhzhia region (in 2015 by 76% compared to 2013), so the share of the industry in the production area is very small compared to other industries.

According to experts, tourism resource potential is inexhaustible in comparison of resource potential in trade and other activities, which are developing rapidly in the Zaporizhzhia region. We believe that tourism can take the lead in business in the Zaporizhzhia region, its cluster potential is average (level B).

Availability of Production Factors

Almost all tourism industry inputs listed in the Tab. 3 are available to create a cluster. The Dnieper River and the island of Khortytsia can be considered as the main among natural resources. In general, natural resources of the Zaporizhzhia region are very diverse, unique, they are not exploited enough but very attractive for tourists. In the region, there are almost 7% of Ukrainian protected areas and national parks, 8% water source reservoirs, forests 9%, 10% hydro resources of Ukraine.

Tab. 3: Availability of tourism industry inputs in the Zaporizhzhia region

Production factors (resources)	Rating	Score
Natural	Available	1
Mineral	Available	1
Money Cash resources	Available	1
Labor	Available	1
Infrastructure:		
- Information infrastructure	Available	1
- Physical Infrastructure	Available	1
- Scientific and technological infrastructure	Unavailable	2
- Legislation	Available	1
Total score		**9**

Note: Available factor is assigned a score of 1, unavailable - 2. Scale to assess the clustering potential clustering for production factors is as follows:
Level A – 8-10 points (all factors available);
Level B – 11-15 points (only part of the factors available)
Level C – 16 points (factors unavailable in general)
The level of tourism industry clustering potential in the Zaporizhzhia region for production factors is high (level A).

Source: [authors development]

In the Zaporizhzhia region, a tourism development concept was elaborated for the period up to 2018 (Stratehiia rozvytku turyzmu u misti Zaporizhzhia na 2014-2018 rr).

As of 01.01.2015, as many as 125 hotels operating in the Zaporizhzhia region can accommodate a total of 105,378 people (Yazina, 2015:108).

The hospitality industry (Stratehiia rozvytku turyzmu u misti Zaporizhzhi na 2014-2018 rr) in the Zaporizhzhia region has obviously the following trend: the number of hotel establishments was relatively stable for 2009-2011, but at Euro 2012 it decreased significantly, due to many inspections and failure to meet European standards. This caused fierce competition between hotel management companies. In years 2013-2014, with the number of hotels stabilized, the number of placed persons began to grow, but the current statistical information remains unstable and the hotel industry is exposed to external and internal factors, of particular importance is the political and economic situation, due to the events in the east.

Most of the restaurant industry objects (87.4%) are located in cities and urban areas. Of the total number of objects, 64.8% are located in the regional center Zaporizhzhia, only 8.3% are in the city of Berdyansk, 2.6% − in the city of Melitopol, 4.3% − in the city of Energodar and the city of Tokmak has 0,2 % (Yazina, 2015: 110). Of the total number of restaurant business objects, 52.8% are cafes, snack bars, buffets (kiosks), their number by January 1, 2015 had decreased by 10.8% and was 281 units. At the same time, there were 156 dining rooms, 55 bars, 27 restaurants and 13 ready meals supplying companies (as of January 1, 2015) (Yazina, 2015).

All this are the material resources for tourism development. Hotel and restaurant business affects the balance of payments, stimulates the development of related industries. It provides jobs for the population, mainly in the service sector, with employment in the tourism business steadily growing. There is a growing demand for specialized education. Especially popular are the universities that train specialists for the tourism industry. Infrastructure resources are also mostly available. Information about the tourism development in the Zaporizhzhia region, the types of tourism and others is located in more than 35 major Internet directories, servers, specialized firms' sites.

The physical infrastructure of the tourism industry in the Zaporizhzhia region is presented by rail, road, water and air transport. However, presently the scientific and technological infrastructure is poorly developed, with any information on new technologies used in the tourism industry missing. The domestic demand. Evaluation of the internal demand for the tourism industry in the Zaporizhzhia region is provided in Tab. 4.

Tab. 4: Evaluation of domestic demand in the tourism industry of the Zaporizhzhia region

Demand Carriers	Rating	Scores
Zaporizhzhia region tourists	Present	1
Ukrainian tourists	present	1
Foreign tourists	present	1
The level of tourists requirements	Average	2
Total scores		**5**

Note: The presence of demand notes 1 score, its absence is 2 score.
The scale of scores distribution to assess the clustering potential for the demand factor is:
- Level A – 4-5 (demand interested);
- Level B – 6-8 (demand varies);
- Level C – 9 (demand indifferent).

Source: [authors development]

The level of clustering potential denoted by the demand for travel services in the Zaporizhzhia region is high (level A). Official statistical data on the internal (local) tourists the number in the Zaporizhzhia region is missing. However, it can be assumed that most of the economically active population of the Zaporizhzhia region tends to have a rest on the river Dnieper, Khortytsia Island, coastal areas, resorts, recreation centers, health centers of the Zaporizhzhia region. The number of foreign tourists visiting the Zaporizhzhia region decreased significantly.

Tab. 5: The number of foreign tourists serviced by tourism subjects in the Zaporizhzhia region (persons)

	2013	**2014**	**2015**	**Deviation 2015/2014**	**Deviation 2015/2013**
Total	778	112	31	-81	-747

Source: [authors development]

This dynamic reduction of almost 4% of the foreign tourists' flow to the Zaporizhzhia region is caused by social and economic instability in the country in general and the region in particular, and the lack of active image policy in this area.

One of the key conditions for creating a cluster in a particular area is availability of competitive suppliers and related industries and organizations. Such providers in the tourism industry are absent, but there are related industries indispensable for the tourism development. These industries include food processing, souvenirs production, services, insurance companies, recreation and entertainment companies, communication services and so on.

So instead of industry suppliers indicator, there will be used another indicator, that of the related industries and organizations presence and level of activity. If a measure indicator exists, then a score of 1 is assigned, if not – 2 points are assigned (Tab. 6). The degree of activity is defined as high, medium, low (respectively 1.2 and 3 points).

Clustering Potential indicator on the availability of competitive suppliers and related industries and organizations is high (level A).

Tab. 6: Assessment of related industries and organizations in the tourism industry in the Zaporizhzhia region

Indicator	**Rating**	**Scored points**
Qualitative characteristics		
Related industries		
Availability	present	1
Degree of activity	high	1
Professional non-profit organizations		
Availability	present	1
Degree of activity	high	1
Research organizations		
Availability	present	1
Degree of activity	low	3
The vocational education institutions		
Availability	present	1
Educational level	High, secondary, professional	1
Non-profit organizations, related industries		
Availability	present	1

Degree of activity	average	2
Public institutions support of and assistance to companies in the tourism sector		
Interest	high	1
Degree	high	1
Media industry organizations support to the tourism industry		
Availability	high	1
Degree	high	1
Total points		18

Note: The following scale is used to assess the clustering potential for the factor considered:

Level A – 14-20 (supporting industries and organizations are present, their level is high);

Level B – 21-28 (supporting industries and organization are present, but their level is average);

Level C – 29-35 (industry and supporting organizations are available).

Source: [authors development]

From professional organizations in the region, there are: Social and Advisory Board of Tourism, Tourist information center, Zaporizhzhia Regional Tourist Information Center; a non-profit, public organization 'Zaporizhzhia Regional Tourist Association' established at the initiative of individuals, whose activities affect the tourism industry, according to the Constitution of Ukraine, the Law of Ukraine "On Tourism", the Law of Ukraine "On Public Associations" and more legislation of Ukraine.

There are no research organizations dealing with special problems of tourism in the Zaporizhzhia region. However, research is conducted in universities, the Department of Tourism Authority of the Zaporizhzhia region, and in various research institutes.

The other organizations' level of activity is also quite high.

Evaluation results of competition in the internal market and of company strategy are given in Tab. 7

Tab. 7: Domestic market competition and companies' strategy

Indicator	Rating	Score
Domestic market competition	Present	1
Companies' strategy	present	1
Total		2

Note:Scale to assess potential clustering by the presence of competition in the region is as follows:

Level A - 2 (strong competition);

Level B - 3 (weak competition);

Level C - 4 (no competition).

The level of clustering potential by the presence of competition in the Zaporizhzhia region is the highest (level A).

Source: [authors development]

The analysis results of the tourism competitive advantage sources in the Zaporizhzhia region are given in free form in Tab. 8.

Tab. 8: Components of tourism industry clustering potential in the Zaporizhzhia region

Clustering potential components	Clustering potential level
Indicators of production localization	B
Production Factors	A
Domestic market demand	A
Competitive supplying and other related industries	A
Competition in the market and companies' strategy	A

Source: [authors development]

In the Zaporizhzhia region now there are 210 travel agencies licensed for tour operator and travel agency activities. They are concentrated in three major cities in the region: Berdiansk, Melitopol, Energodar.

Of all travel companies, two-thirds are the tour operators, the rest is the travel agent companies. It is the tourist companies that directly form tourist flows and contribute to tourist attractiveness of the region.

Many tour operators have conducted international tourist activity for 5-10 year, having a long experience in the field. They are involved in promoting regional tourism products to the internal market and in expanding tourism opportunities of the Zaporizhzhia region. Many companies have a long term development strategy.

In general, of five tourism industry clustering potential components, four have a high level (A) and one has an intermediate level (B). This allows you to believe that a competitive tourism cluster may be created in the Zaporizhzhia region. All this suggests that Zaporizhzhia region has all the prerequisites for effective clusters to be created and developed, with the region competitiveness improved.

4 Discussion

The value of calculated factors characterizing the travel agencies activities is much more than one, indicating fair conditions for the tourism cluster creation.

The cited methods allow to evaluate the clustering potential by focusing on tourism development at the macro level (global) and also at the meso level (regional) and micro level (analysis of environmental factors of travel agencies activities). The methods at hand, unfortunately, do not concern any analysis of system deployment, maintenance and transport, which can also be included in the cluster and require more detailed analysis and study of statistics. The calculated coefficients of localization, specialization and sales for 1 person indicate that tourism in the Zaporizhzhia region requires establishing the scale to asses clustering potential (high, medium, low) for a clear interpretation of the calculated parameters.

These shortcomings will be addressed in subsequent studies at improving the mechanism to assess the clustering potential of tourism industry businesses in the region.

Conclusion

Thus, assessment of the clustering potential of regional tourism industry helped identify gaps in managing tourism industry development infrastructure.

Evaluation of macro-environment, that is of the country's' rating among global competitors in the industry indicates a significant lag in the development of the tourism industry in Ukraine, as well as its extremely low yield in comparison to world average and European average rates. The poor quality of infrastructure and lack of investment constrain revenue growth in tourism sector.

Ukraine is at risk of not performing the basic prediction of economic benefits due to lack of infrastructure and investment. Assessment 3.7 of 7 signifies the need for the transport routes development and air transport reformation.

The coefficients of localization, specialization and sales per capita, calculated on travel agency activity are significantly greater than one, which indicates good conditions for a

cluster creation. The above factors calculated for tour operator activities have a trend of negative dynamics reduction and indicate the need to create a complex regional tourism product, which could increase the demand for tour operator services in the region.

Expert evaluation on microeconomic environment of the tourism industry in the region generally suggests that of five tourism clustering potential components, four of them have a high level (A) and one has intermediate (B), meaning that the Zaporizhzhia region possesses all the potential to create a competitive tourism cluster.

Acknowledgement

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