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EFFECTIVENESS OF JOINT MANAGEMENT AND COMPREHENSIVE MARKETING STRATEGIES IN TOURISM AND HOSPITALITY CLUSTER STRUCTURES

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ЕФЕКТИВНІСТЬ СПІЛЬНОГО МЕНЕДЖМЕНТУ ТА КОМПЛЕКСНИХ МАРКЕТИНГОВИХ СТРАТЕГІЙ У КЛАСТЕРНИХ СТРУКТУРАХ ТУРИЗМУ І ГОТЕЛЬНО-РЕСТОРАННОЇ СПРАВИ

In a highly competitive environment, business entities in the tourism and hospitality (hotel and restaurant) sectors face limited opportunities for individual development. This is due to high promotion costs, low differentiation of products and services, rapid imitation of offerings, and intense price competition. Therefore, the aim of this study is to substantiate and analyze the effectiveness of joint management and shared marketing strategies within tourism and hospitality cluster structures, as well as to assess their impact on creating competitive advantages and facilitating the transition of enterprises from operating in the "red ocean" to creating a "blue ocean" in the market. Research on the effectiveness of joint management and shared marketing strategies in tourism and hospitality clusters has shown that the coordination and integration of participants' actions enable the creation of a comprehensive tourism product, enhance regional competitiveness, and generate unique market offerings. The study demonstrates that joint management is effective when it ensures high-quality process organization, quality standardization, and resource optimization, while shared marketing strategies are effective when they promote the territory, increase brand recognition, and attract tourists and investments. The scientific value of these findings lies not only in identifying patterns and principles of cluster functioning in tourism and hospitality (or hotel and restaurant industry), but also in developing scientifically grounded recommendations for improving the effectiveness of joint management and marketing. The results confirm that through collective decision-making, process coordination, adaptation to market changes, and shaping and satisfying consumer demand, it is possible to create conditions for a transition from competitive struggles in the "red ocean" to the creation of new market niches in the "blue ocean," where the value of the tourism product increases due to its uniqueness and the collaborative cooperation of cluster participants. Thus, the proposed approaches can serve both as a theoretical foundation for further research on cluster structures in tourism and hospitality and as a practical tool for managers and local authorities, supporting the sustainable development of the regional tourism industry and improving its economic efficiency.

В умовах високої конкуренції суб'єкти господарювання туристичної та готельно-ресторанної сфери стикаються з обмеженими можливостями для індивідуального розвитку. Це зумовлено високою вартістю просування, недостатньою диференціацією продуктів і послуг, швидким копіюванням ринкових нововведень та жорсткою ціновою боротьбою. Метою дослідження є обґрунтування та аналіз ефективності спільного менеджменту й комплексних маркетингових стратегій у кластерних структурах туризму та готельно-ресторанних послуг, а також визначення їхнього впливу на формування конкурентних переваг і забезпечення переходу суб'єктів господарювання від умов ринку "червоного океану" до створення ринку "блакитного океану". Дослідження ефективності спільного менеджменту та комплексних маркетингових стратегій у кластерних структурах туризму та готельно-ресторанної справи показало, що координація та інтеграція дій їх учасників дозволяє створювати комплексний туристичний продукт, підвищувати конкурентоспроможність території та формувати унікальні ринкові пропозиції. За результатами дослідження доведено, що спільний менеджмент є ефективним за умови забезпечення якісної організації процесів, стандартизації якості та оптимізації ресурсів, тоді як комплексні маркетингові стратегії виявляють ефективність, коли сприяють просуванню території, підвищенню впізнаваності бренду та залученню туристів і інвестицій. Наукова цінність отриманих результатів полягає не лише у виявленні закономірностей та принципів функціонування кластерів у сфері туризму та готельно-ресторанної справи (ГРС), а й у формуванні науково обґрунтованих рекомендацій щодо підвищення ефективності спільного менеджменту та маркетингу. Результати дослідження підтверджують, що завдяки спільним діям у прийнятті рішень, координації процесів, адаптації до змін на ринку, формуванню попиту та задоволенню потреб споживачів створюються умови для переходу від конкурентної боротьби до формування ринкових ніш де цінність туристичного продукту зростатиме завдяки його унікальності та кооперації учасників кластеру. Таким чином, запропоновані підходи можуть стати теоретичною основою для подальших досліджень кластерних структур у туризмі і ГРС, а також практичним інструментом для управлінців і місцевих органів влади, сприяючи стійкому розвитку регіональної туристичної індустрії та підвищенню її економічної ефективності.

Keywords: opportunities for individual development; formation of competitive advantages; integration of actions; joint management; comprehensive marketing strategies; cluster; competitive struggle.

Ключові слова: можливості індивідуального розвитку; формування конкурентних переваг; інтеграція дій; спільний менеджмент; комплексні маркетингові стратегії; кластер; конкурентна боротьба.

PROBLEM STATEMENT

The modern tourism and hospitality (hotel and restaurant) market is characterized by high competition, a growing demand for standardized products, and rapid market saturation. Under such conditions, most companies are forced to operate in the so-called "red ocean," where the struggle for customers leads to price reductions, increased marketing expenses, and decreased profitability. At the same time, global market trends and changing consumer behavior create a need to shift toward strategies that not only allow competition but also generate fundamentally new value, opening the possibility of operating in a "blue ocean" — a space of innovative demand and unique offerings.

One of the most effective mechanisms for creating such a competitive space is tourism and hospitality clusters, in which enterprises apply joint management and develop shared marketing strategies. Cluster interaction not only enhances coordination and optimizes costs but also stimulates the creation of innovative joint products, contributes to the development of unique tourist routes, cultural-regional offerings, and territorial brand platforms. Overall, clustering allows market participants to move away from price war practices toward the creation of new demand segments.

ANALYSIS OF RESEARCH AND PUBLICATIONS

The study of the effectiveness of joint management and shared marketing strategies within cluster structures is a relevant scientific task. According to the research of Maslyhan O.O., Todierishko E.V., Kuznetsova O.V., and Shafranov K.V. [3], these mechanisms can ensure sustainable development of the tourism and hospitality (hotel and restaurant) industry under conditions of market turbulence. Moreover, as demonstrated by Zabarnaya E.M., Papkovska O.E. [1], Stadnik V.V., Melnychuk O.P., and Yokhna V.M. [6], identifying patterns, principles, and tools for implementing joint management and shared marketing strategies allows for the development of scientifically grounded approaches to enhancing regional competitiveness and creating new market opportunities for the joint development of participants operating within cluster structures.

It should be noted that this research is important because it can serve as both a practical and theoretical foundation for the development of the tourism and hospitality industry under modern market challenges, creating the conditions for:

- identifying effective mechanisms for coordination and interaction among enterprises that ensure synergy and sustainable development of tourism clusters;

- developing recommendations for optimizing resources and reducing marketing costs without compromising the quality of the tourism product;

- creating comprehensive strategies that enable a shift from the "red ocean" to the "blue ocean," generating unique offerings and new market niches for the region.

Thus, the results of the study can not only improve the managerial and marketing practices of cluster participants but also contribute to enhancing territorial competitiveness and the socio-economic development of regions.

FORMULATION OF THE ARTICLE'S OBJECTIVES

Therefore, the aim of the study is to substantiate and analyze the effectiveness of joint management and shared marketing strategies within tourism and hospitality (or hotel and restaurant industry) cluster structures, as well as to determine their impact on the formation of competitive advantages and the transition of enterprises from operating in a "red ocean" to creating a "blue ocean" in the market.

THE PAPER MAIN BODY

In conditions characterized by high competition, modern tourism and hospitality enterprises face limited opportunities for individual development. This is due to the high costs of promotion, low product and service differentiation, rapid imitation of offerings, and intense price competition. For example, a small family restaurant in Berehove or a hotel in Vynohradiv is unable to independently organize a large-scale advertising campaign on the domestic and international market, or to create a comprehensive tourist route that would include gastronomy, cultural events, excursions, and accommodation. As a result, such enterprises are forced to compete primarily on price, which reduces their profitability and prevents them from standing out among other offerings. These conditions have created a need for collective forms of business organization, as in these cases economic interaction replaces competition with cooperation, becoming a means of achieving sustainable market advantages [1].

It should be noted that, according to the research of Maslyhan O.O., Todierishko E.V., Kuznetsova O.V., and Shafranov K.V., the cluster model always involves the unification of business,

government, educational, and cultural institutions, thereby promoting the formation of joint management and marketing [3]. In particular, the concept of collectivity is shaped by several key factors, including:

1. Shared interests and resources. Cluster participants operate within the same territory and are interested in developing a common local tourism product;

2. The need for collective territorial branding. A single enterprise cannot create a territorial brand on its own, but in collaboration with other players, this becomes possible;

3. Knowledge and innovation synergy. The exchange of practices enhances the ability to create new types of tourism and gastronomic products;

4. Shared access to infrastructure and support programs. Clusters receive priority in state and international grants, investments, and promotional projects.

In this context, joint management within tourism and hospitality (hotel and restaurant) cluster structures can be defined as the coordinated activities of all cluster participants — including hotels, restaurants, travel agencies, local product producers, government bodies, and cultural and educational institutions — in planning, organizing, controlling, and developing a unified tourism product at the level of the entire region or territory [5]. Meanwhile, comprehensive marketing refers to the coordinated activities involved in promoting, advertising, branding, and communicating the products of the entire cluster [7].

Considering the transformed nature of these activities, it should be noted that in clusters the phenomenon of collectivity is a response to the need to avoid excessive competition in the "red ocean" and to shift from individual survival strategies to collective strategies for creating new value. An example of this is the tourism and gastronomic cluster in Zakarpattia, which develops in areas with a compact Hungarian minority population (primarily in Berehivskiy District, and partially in Vynohradivskiy, Uzhhorodskiy, and Mukachevskiy Districts). Within this cluster, individual restaurants, hotels, farms, and local product producers, instead of competing for the same customer, unite to create a comprehensive gastronomic route [3—4].

A distinctive feature of this model is that no single participant can independently create a full-fledged tourism product (as they are unable to simultaneously provide the entire spectrum of components of the tourist experience [7—8]), but

Table 1. Description of the components of the comprehensive tourism and gastronomic offering in the Zakarpattia cluster with a Hungarian ethnocultural focus

Component of the tourism product	Specifics of tourism product formation	Specifics that form the uniqueness of the joint product
Local cuisine as the core value of the cluster	The Transcarpathian Hungarian cuisine forms the foundation of the tourism and gastronomic product. It is distinguished by a combination of Hungarian, Central European, and local mountain traditions.	Uniqueness of the menu, which includes: bográcsgulyás (goulash cooked over an open fire); lecsó, paprikás, and tokány with paprika; Hungarian sausages, smoked meats, cracklings, and roasted dishes; desserts based on plums, poppy seeds, and honey (rétes, plum marzipan); local wine and the unique drink "pálinka." These dishes are not merely food services, but cultural symbols of the region, which the consumer "experiences" rather than simply purchases.
Themed gastronomic festivals	Festivals create peak demand periods, attract new tourist segments, and strengthen the territory's brand. In this cluster, events are typically dedicated to dishes, crafts, and local products.	Uniqueness of events, including the Bogrács Festival in Berehove; wine and young wine festivals in Vynohradiv; plum, honey, and brynza festivals; and ethno-fairs featuring local cuisine and dances. These festivals not only serve an entertainment function but also act as public marketing for the cluster, showcasing the product, history, and gastronomic style of the region.
Excursions to local product production sites	Clusters integrate producers into tourism by creating tourist production routes.	Uniqueness of routes, including visits to wine cellars and tastings; tours of family-owned dairies and meat smokehouses; demonstrations of pálinka or honey liqueur production; and introductions to farms and orchards. Tourists gain access to the product creation process, which fosters emotional engagement and loyalty to the territory's brand.
Master classes	Master classes are events that make the tourist an active participant in the tradition, as the tourist "takes home" not a product, but an experience.	Uniqueness of activities, including master classes on preparing bogrács, lecsó, and sausages; lessons on working with paprika and meat; and making local sweets or cheeses. These activities serve as personalized service and contribute to emotional branding.
Accommodation and services as the completion of the comprehensive model	Accommodation is not just a place to stay, but part of the gastro-cultural route through: local design and decorative elements, and the offering of local dishes.	Uniqueness of accommodation, including stays in family-run agritourism homesteads with ethnic interiors; guesthouses offering local cuisine; and hotels providing local menus and wine. Guest services enhance the tourism product and support partnership programs with restaurants and producers.

Source: created by the authors based on [7–8].

together they form a unique offering:

$$LC+TF+E+MC+AS \quad (1),$$

where:

LC — local cuisine;

TF — themed festivals;

E — excursions to local product production sites;

MC — master classes;

AS — accommodation and services.

From the detailed description of the components of the comprehensive tourism and gastronomic offering of the Zakarpattia cluster with a Hungarian ethnocultural focus (see Table 1), it is evident that such an approach not only attracts new segments of tourists (gastro-tourists, cultural researchers, and enthusiasts of local traditions) but

also creates a new space of demand. In this space, economic actors cease to compete with one another and instead jointly generate demand for the territory and its brand.

It is the combination of these five unique elements that creates a comprehensive path — encompassing the dish itself, the story of its origin, production techniques, participation in the process, and thermal recreation. This serves as a vivid example of the shift toward a "blue ocean," a strategic management concept proposed by W. Chan Kim and R. Mauborgne, which emphasizes the creation of new market niches and customer value in areas with minimal competition [2]. In such a "blue ocean," value is not diminished by price but is enhanced through the product's uniqueness and participant cooperation, enabling the development of new demand segments and expanding opportunities for both business and regional growth.

Considering the components that ensure the completeness of the tourism product within a cluster, the effectiveness of joint management and marketing in tourism and hospitality (hotel and restaurant) clusters is reflected in several key areas: enhancing competitiveness without lowering prices; significantly reducing marketing costs without diminishing the quality of product pro-

motion; achieving synergy in management and innovation; developing territorial branding; and attracting investment. Each of these areas will be examined in detail, taking into account their specific characteristics and their crucial impact on shaping a comprehensive tourism product within the cluster.

Enhancing competitiveness without lowering prices becomes possible because, within tourism and hospitality (hotel and restaurant) clusters, individual market participants do not compete for the same customer through pricing. Instead, they jointly create a unique integrated product that combines gastronomy, cultural events, master classes, excursions, and accommodation [1; 6]. This approach enables them to avoid the price wars

Table 2. Specifics of value creation for tourists in the "red" and "blue" oceans

Parameter	Traditional market ("Red Ocean")	Specific approach ("Blue Ocean")
Competition	High; companies compete for existing customers	Minimal; new market niches are created
Pricing policy	Main tool of competition is price reduction	Customer value increases through product uniqueness rather than price
Product	Standardized, similar to competitors' offerings	Comprehensive, unique, integrating gastronomy, events, master classes, excursions, and accommodation
Marketing	Focused on attracting competitors' customers	Focused on creating new demand and attracting new segments
Value for the tourist	Often low or medium; consumers choose based on price or availability	High; tourists receive a comprehensive and unique experience
Risk	Constant pressure on profitability due to competition and price cuts	Lower risk, as the offering is new and has inherent value
Impact on territory/cluster	Limited; does not contribute to regional brand development	Increases regional recognition, builds a tourism brand, and stimulates investment

Source: created by the authors based on [1-2; 6-8].

characteristic of the "red ocean," while simultaneously creating the opportunity to enter a "blue ocean" by generating value for tourists through uniqueness (see Table 2).

Significant reductions in marketing costs without compromising the quality of product promotion within clusters are achievable through the implementation of shared marketing strategies. These strategies enable resource optimization by [5; 8]:

- collective participation in exhibitions and tourism fairs;
- creation of a unified advertising and information platform for all cluster participants;
- coordination of PR activities and digital marketing campaigns.

This approach ensures a broader reach to tourists while maintaining high-quality product promotion. It is particularly important for small and medium-sized enterprises, which would otherwise be unable to compete independently with large brands in domestic and international markets.

The synergy of management and innovation arises from the integration of cluster participants and the establishment of a shared space for knowledge exchange and the implementation of innovative solutions [3-4]. Examples include the development of new routes and programs, the integration of digital services (such as online booking, mobile applications, and interactive audio guides), and the standardization of service quality while preserving local authenticity. This

approach allows for rapid responses to changes in demand and improves management efficiency, while simultaneously creating new types of tourism products that strengthen the cluster's competitive position.

Territorial branding and investment attraction are shaped by joint management and comprehensive marketing, which together form the cluster brand associated with uniqueness, high service quality, and authenticity. The benefits of such a brand include increased recognition of the territory in both domestic and international markets, attraction of tourists from diverse segments, and stimulation of investments in local projects and infrastructure development. Thus, the cluster brand becomes not only a marketing tool but also a mechanism for socio-economic development, reinforcing the synergy between busi-

nesses, authorities, and the community [8].

For example, the Transcarpathian cluster, with a Hungarian ethnocultural focus, has developed a shared regional brand that includes gastronomic routes featuring tastings of local Hungarian cuisine, local product festivals, and master classes on preparing traditional dishes and crafts. Through territorial branding, the cluster has become more recognizable to tourists not only from Ukraine but also from neighboring countries, stimulating infrastructure development, the emergence of new business partnerships, and investment in local projects.

Overall, joint management and comprehensive marketing within tourism and hospitality cluster structures mutually reinforce each other, achieving effectiveness through the creation and promotion of a unique product. This approach facilitates a shift from intense competition in the "red ocean" to the development of new market niches and the generation of value in the "blue ocean," where enterprises prioritize distinctive offerings rather than competing on price [2].

CONCLUSIONS

Research on the effectiveness of joint management and collaborative marketing strategies within tourism and hospitality cluster structures has shown that coordination and integration of participant activities enable the creation of a comprehensive tourism product, enhance regional competitiveness, and generate unique market offerings. The study demonstrates that joint management is effective when

it ensures high-quality process organization, quality standardization, and resource optimization, while comprehensive marketing strategies are effective when they contribute to territorial promotion, brand recognition, and the attraction of tourists and investments.

The scientific value of these findings lies not only in identifying patterns and principles governing cluster functioning in the tourism and hospitality sectors but also in providing evidence-based recommendations for improving the effectiveness of joint management and marketing. The results confirm that through collective decision-making, process coordination, market adaptation, demand formation, and meeting consumer needs, it is possible to create conditions for a shift from competitive rivalry in the "red ocean" to the development of new market niches in the "blue ocean," where the value of the tourism product increases due to its uniqueness and the collaborative efforts of cluster participants.

Consequently, the proposed approaches can serve both as a theoretical foundation for further research on cluster structures in tourism and hospitality and as practical tools for managers and local authorities, supporting sustainable development of the regional tourism industry and enhancing its economic efficiency.

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