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METHODICAL PRINCIPLES OF CLUSTER MANAGEMENT IN TOURISM AND HOTEL-RESTAURANT BUSINESS

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МЕТОДИЧНІ ЗАСАДИ УПРАВЛІННЯ КЛАСТЕРОМ В ТУРИЗМІ І ГОТЕЛЬНО-РЕСТОРАННОМУ БІЗНЕСІ

Modern economies can be viewed as complex systems in which each element interacts with others, exchanging resources and influencing opportunities. In this context, one of the most effective ways for economic actors to survive and develop is through functioning within a collective or community. Clusters play precisely this role in contemporary economies, classically defined as concentrations of interrelated enterprises and institutions that collaborate closely to achieve common objectives. Experience from leading countries demonstrates that clusters not only enhance productivity and foster innovation but also increase resilience to market fluctuations, making them one of the most efficient forms of economic development. Accordingly, this article aims to examine the methodical foundations of cluster management in tourism and the hotel and restaurant business, which are shaped according to the cluster's life cycle, from creation to full operation. The study establishes that these methodical foundations are key tools for ensuring synergy among cluster participants, enhancing competitiveness, optimizing resources, and generating additional economic and social value for the region. These processes determine the orientation of the methodical foundations of cluster management, ensuring both the effectiveness and sustainability of the cluster system in the tourism and hotel-restaurant sector. It is concluded that the orientation of the methodical foundations should create conditions under which: (1) joint activities among cluster participants—such as hotels, restaurants, and travel agencies—are effectively developed; (2) service quality standards and mechanisms for monitoring and improving service are implemented, making the cluster's tourism products more attractive in the market; (3) resources are used efficiently through coordinated procurement, joint marketing, personnel exchanges, and training programs, reducing costs and increasing operational efficiency; and (4) economic growth and improvements in the social environment are promoted, generating additional value for the local community and investors.

Розглядаючи сучасну економіку як складний організм, де кожен елемент взаємодіє з іншими, обмінюючись ресурсами та впливаючи на можливості, стає очевидним, що найефективніший спосіб виживання й розвитку — функціонувати у певному об'єднанні або спільноті. Саме таку роль у сучасній економіці відіграє кластер, який класично визначають як концентрацію взаємопов'язаних суб'єктів господарювання та інституцій, що працюють у тісному співробітництві задля досягнення спільних цілей. Досвід провідних країн світу доводить: кластери забезпечують не лише зростання продуктивності та інноваційний розвиток, а й стійкість до ринкових коливань, що робить їх найбільш ефективною формою розвитку економіки. Відтак метою цієї статті є розгляд методичних засад управління кластером у туризмі та готельно-ресторанному бізнесі, які формуються залежно від життєвого циклу кластерних структур — від їх створення (ініціації) до повноцінного функціонування (стабілізації). У результаті проведеного дослідження встановлено, що методичні засади управління кластером у туризмі та готельно-ресторанному бізнесі є ключовими у забезпеченні синергії між діями учасників кластера, підвищенні конкурентоспроможності, оптимізації ресурсів, створення додаткової економічної й соціальної цінності для регіону. Констатовано, що для забезпечення ефективності та стійкості кластерної системи у туристичній та готельно-ресторанній сфері методичні засади управління кластером повинні бути спрямовані на створення умов, за яких: розвивається спільна діяльність учасників кластера (готелів, ресторанів та туристичних агентств тощо); діють спільні стандарти якості послуг та механізми контролю і вдосконалення сервісу (що робить туристичні продукти кластера більш привабливими на ринку); забезпечується раціо-

нальне використання ресурсів (через координацію закупівель, спільний маркетинг, обмін персоналом та навчальні програми, що зменшує витрати та підвищує ефективність); відбувається економічне зростання та покращення соціального середовища в регіоні, формування додаткової цінності для місцевої громади та інвесторів.

Key words: shared objectives; cluster; tourism; hotel and restaurant business; economic growth; added value; life cycle; management.

Ключові слова: спільні цілі; кластер; туризм; готельно-ресторанний бізнес; економічне зростання; додаткова цінність; життєвий цикл; управління.

PROBLEM STATEMENT

Viewing the modern economy as a complex organism in which every element interacts with others, exchanging resources and influencing opportunities, it becomes evident that the most effective way to survive and develop is to function within a certain association or community. This is precisely the role that clusters play in contemporary economic systems. Traditionally, a cluster is understood as a concentration of interrelated business entities and institutions that operate in close cooperation to achieve common goals. The experience of leading countries demonstrates that clusters ensure not only increased productivity and innovative development, but also resilience to market fluctuations, making them one of the most effective forms of economic advancement.

The application of the cluster approach is particularly relevant in the sphere of tourism and the hotel and restaurant business, as the success of these sectors largely depends on the coordination of core elements, the structure of which depends on the stage of the cluster's life cycle. This factor determines the scope of participants involved in tourism activities, concentrated in various fields — from production and logistics to service provision. In this context, it should also be noted that the management of such clusters requires a systemic approach and methodical foundations that enable the optimization of interaction processes, the enhancement of competitiveness, and the creation of a synergistic effect, which serves as a key driver of regional economic development.

ANALYSIS OF RESEARCH AND PUBLICATIONS

Specific principles, rules, and models of cluster management in tourism and the hotel and restaurant industry have been examined by such researchers as Maslyhan O.O., Kasynets O.V. [4], Zhukov S.A., Kampov N.S., Todierishko E.V., Krimkova O.S. [3], and Hoblyk-Markovych N.M. [5]. These scholars emphasize that effective cluster management is possible only through the implementation of well-defined methodical frameworks that ensure coordinated interaction among enterprises with different specializations.

In particular, the aforementioned researchers highlight that:

- the principles of tourism cluster management should be based on voluntary participation, equality in partnership relations, trust, and transparency of economic interactions;

- the rules of cluster cooperation should provide for shared responsibility, the establishment of common goals, service standardization, as well as mechanisms for collective decision-making;

- cluster management models must take into account the specificity of the tourism product, the multicomponent nature of services, the need for integrated marketing, and the diversification of activity directions, which together generate a comprehensive synergistic effect for cluster participants.

Despite these contributions, the methodical foundations of cluster management in the tourism and hotel and restaurant sectors have not yet been sufficiently explored. This indicates the need for a systematic investigation aimed at developing approaches capable of strengthening cooperative synergy, enhancing competitiveness, and ensuring the sustainable development of clusters at both regional and national levels.

FORMULATION OF THE ARTICLE'S OBJECTIVES

The purpose of this article is therefore to examine the methodical foundations of cluster management in tourism and the hotel and restaurant industry, which are shaped by the life cycle of clusters — from their formation to the functioning of cluster structures.

THE PAPER MAIN BODY

The methodical foundations of cluster management in tourism and the hotel and restaurant business represent a set of principles, rules, models, and practical guidelines that determine the effective process of forming, coordinating, and developing cluster structures in these sectors. We concur with the assertions of Maslyhan O.O., Hoblyk-Markovych N.M., Todierishko E.V., and Kampov N.S. [3], who argue that these methodical foundations should facilitate synergy among clus-

ter participants, increase competitiveness, optimize the use of resources, and generate additional economic and social value for the region.

The orientation of the methodical foundations of cluster management in tourism and the hotel and restaurant business is presented in Figure 1.

Ensuring synergy among cluster participants is crucial because hotels, restaurants, and travel agencies alone cannot achieve the same results. Only through joint activities is it possible to combine resources, knowledge, and capabilities, resulting in greater economic and social impact. For example, hotels in Chernivtsi advertise their services independently, restaurants conduct their own marketing campaigns, and travel agencies offer individual excursions. However, tourists often select only isolated services or travel to other regions due to the lack of a comprehensive offer.

In contrast, within the "Kamianets" tourism cluster, hotels, restaurants, and agencies pool their efforts to create integrated tourism packages, such as accommodation + dinners at the best local restaurants + excursions to historical sites (the Fortress, the Old Town, the City of Seven Cultures). They conduct joint advertising campaigns on tourism portals, social media, and at exhibitions. As a result, the annual tourist flow has steadily increased because the comprehensive offer attracts more visitors. For instance, in 2016, the cluster's information center registered 6,524 Ukrainian tourists and 1,449 international tourists. By 2021, this number had grown to 17,560 tourists, and in 2023 it reached 23,400 tourists.

Enhancing competitiveness is also crucial because the tourism and hotel and restaurant market is highly competitive. Coordinated efforts within the cluster allow for offering a higher-quality product, integrated services, and unique tourism packages, which attract more clients and strengthen the market position of the participants.

Resource optimization is crucial for the rational use of financial, human, and material resources. Joint planning of procurement, staff exchange, training programs, and coordinated marketing reduces costs and increases the efficiency of cluster operations [7]. For example, in the "Kamianets" cluster, hotels and catering establishments combine purchases of food and household supplies in bulk, enabling savings of up to 20–30% compared to individual procurement.

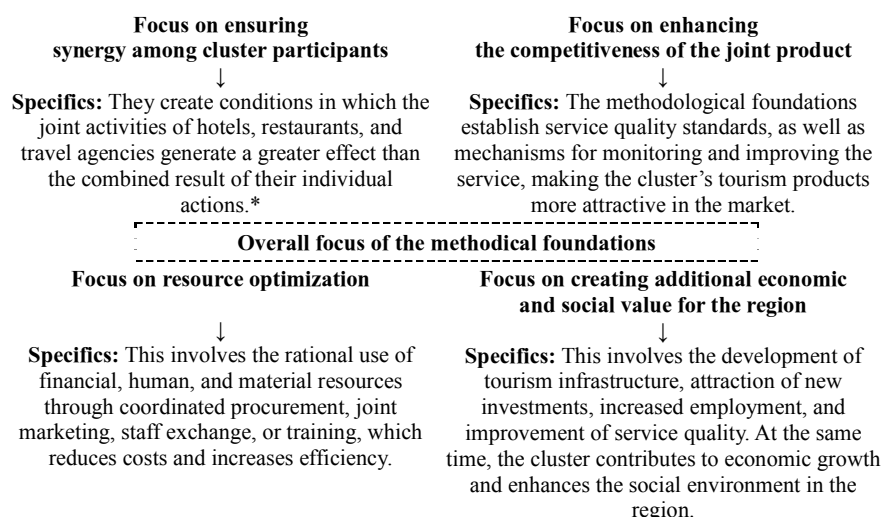


Figure 1. Focus of the methodical foundations of cluster management in tourism and the hotel and restaurant business

Note:

* For example, the joint creation of tourism packages allows attracting more clients than each participant could individually.

Source: created by the authors based on [1–2; 4–5].

The cluster also organizes joint training programs for personnel, including courses on tourist services, English language, and culinary workshops. Temporary staff rotation between establishments is possible during peak seasons. Shared use of transport for excursions or rental of equipment (e.g., souvenir kiosks, audio guides, event equipment) further reduces unnecessary expenses. Advertising is conducted centrally through shared tourism portals and social media, which saves funds while reaching a broader audience. As a result of these measures, costs are reduced, and operational efficiency is increased.

Creating additional economic and social value for the region is important because the cluster stimulates economic growth, infrastructure development, investment attraction, increased employment, and improved quality of tourist services. This added value makes the region more attractive to both tourists and businesses [6–7].

Thus, the processes outlined above determine the focus of the methodical foundations, which operate through their influence on the efficiency and sustainability indicators of clusters in the tourism and hotel and restaurant business.

According to scientific research, the formation of methodical foundations for cluster management and the specifics of exerting managerial influence within its structure depend on the cluster's life cycle, as the goals, tasks, priorities, and needs of participants change at different stages of its existence (see Table 1). In other words, what is effective at the creation (initiation) stage may be irrelevant or insufficient at the development (growth) or operational stages [6].

Table 1. Characteristics of the life cycle stages of a cluster in tourism and the hotel and restaurant business

Life cycle stage	Characteristics of the cluster life cycle stage	Impact on the methodical foundations of cluster management	Impact on the formation of competitive Advantages of cluster participants
Creation (Initiation)	Initial stage of cluster formation, characterized by the establishment of fundamental rules of interaction, the formation of partnerships, the definition of common objectives, and the legal formalization of cooperation.	The methodical foundations focus on coordinating processes, managing resources, supporting interaction among participants, stimulating innovation, and enhancing competitiveness.	Competitive advantages are developed through a shared cluster identity, alignment of strategic objectives, implementation of standardized service quality, mitigation of market entry risks, and the creation of enhanced opportunities for collaboration.
Development (Growth)	Development stage, during which cluster participants focus on activating joint activities, enhancing competitiveness, and implementing innovative services through the creation of joint projects, coordination of marketing campaigns, introduction of innovations, and improvement of service quality.	The methodical foundations concentrate on organizational, legal, and financial mechanisms, fostering trust among participants, and developing a joint strategy for cluster development.	Competitive advantages are further reinforced through lower marketing costs, enhanced access to markets, integrated tourism offerings, economies of scale, and coordinated regional branding.
Operation (Stabilization)	Operational stage, focusing on maintaining stability, quality control, adapting to changes in market demand, and managing risks.	The methodical foundations focus on risk management, performance evaluation, process optimization, and ensuring the flexibility of the cluster structure.	Sustainable long-term competitive advantages are maintained through consistent service quality, cost efficiency, agile adaptation to market changes, and enhanced trust among consumers and investors.

Source: created by the authors based on [1; 4; 6–7].

For example, at the creation (initiation) stage of a tourism cluster, it is essential to establish clear rules of interaction among hotels, restaurants, and travel

agencies, define shared objectives, and formalize cooperation legally [1; 6]. At the development (growth) stage, the primary focus shifts to coordinating joint marketing campaigns, implementing innovative services, and enhancing service quality [6; 7]. During the operational (stabilization) stage, key priorities include monitoring the cluster's performance, managing risks, and adapting to changes in tourist demand [6]. It is important to note that the methodical foundations of cluster management are no longer relevant at the dissolution stage, as the cluster structure ceases to function and coordination mechanisms become obsolete. At this stage, there is no requirement for standards of interaction, joint strategies, or resource management mechanisms, since participants operate independently, preventing the realization of synergy and collective competitive advantages.

At the initiation stage, the tourism and hotel and restaurant business cluster is primarily focused on uniting potential members through the definition of shared objectives and the development of a common organizational framework. At this stage, the methodical foundations play a crucial role in establishing trust in the emerging institutional partnership [1]. This includes the legal formalization of cooperation, clarification of financial arrangements, and transparent rules for participation.

Table 2. Methodical foundations of cluster management in tourism and hotel and restaurant business at the initiation stage

Key aspect	Methodical foundations of cluster management	Example in tourism and hotel & restaurant business
Building trust and institutional partnership (cluster council)	Establishing mutual understanding and shared responsibility among cluster participants; ensuring open communication and transparency of actions	Joint meetings of hoteliers and restaurant managers, professional workshops, and training activities aimed at strengthening trust and facilitating knowledge exchange
Establishing rules for collaborative work	Defining interaction protocols, communication standards, and decision-making procedures to support effective coordination	Agreement on booking and information-sharing rules, establishment of procedures for joint advertising and packaging of tourism services.
Defining a cluster development strategy	Creating a long-term development plan that sets strategic priorities and shared goals for the cluster	Development of a 3- to 5-year plan for a regional tourism brand or route with specific marketing and organizational objectives

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

Moreover, these foundations determine the strategic and organizational mechanisms of interaction, such as the development of a joint cluster development strategy and the establishment of procedures for communication and collective decision-making (see Table 2).

Under certain conditions—such as a large number of participants, significant diversity in business models, or the presence of complex financial and legal interdependencies—the strategic and organizational mechanisms of interaction may require a clear allocation of roles and responsibilities for each participant [1–2]. Additionally, the coordination of shared goals and performance criteria becomes essential to ensure effective collaboration and coherent cluster management.

Based on the established methodical foundations, the cluster participants are expected to complete the initiation phase by achieving a state of readiness for further development and innovation. A key characteristic of this stage is the availability of sufficient resources and operational mechanisms that enable the implementation of joint projects and the enhancement of the cluster's overall competitiveness [4; 6].

The development (growth) stage of a tourism and hotel and restaurant business cluster is oriented toward the intensification of joint projects, the introduction of innovations, and the enhancement of the competitive capacity of cluster participants [2; 6]. At this stage, the methodical foundations focus primarily on process coordination, resource management, and the strengthening of cooperative interaction among members (see Table 3).

Given this orientation, the priorities in applying principles, rules, models, and practical guidelines shift from organizational aspects toward operational efficiency and innovation capacity.

The functioning (stabilization) stage of a tourism and hotel and restaurant business cluster focuses on maintaining sustainability, ensuring the quality of the joint product, and adapting to market changes. At this stage, the methodical foundations are primarily oriented toward risk management, performance evaluation, process optimization, and ensuring structural flexibility (see Table 4).

At this stage, it is particularly important to maintain the cluster's sustainability, ensure the quality of the joint product, and respond rapidly to market changes. This implies that the methodical foundations cannot be universal, as each stage of the cluster's life cycle requires distinct tools, priorities, and management approaches. The life cycle determines the key focus areas for cluster development at each stage and provides the basis for corresponding managerial decisions.

CONCLUSIONS

The study established that the methodical foundations of cluster management in tourism and the hotel and restaurant business serve as a key tool for ensuring synergy among cluster participants, enhancing competitiveness, optimizing resources, and generating additional economic and social value for the region. It was found that these processes determine the orientation of the management framework, ensuring both the effectiveness and sus-

Table 3. Methodical foundations of cluster management in tourism and the hotel and restaurant business during the development (growth) stage

Key aspect	Methodical foundations of cluster management	Example in tourism and hotel & restaurant business
Coordination of development processes	Implementation of joint action plans, regular meetings, and communication platforms for information exchange.	Joint development of tourism routes and service packages by hotels, restaurants, and tour operators.
Resource management	Optimization of financial, human, and material resources through shared investment and rational allocation.	Collective procurement of food products for restaurants, coordination of seasonal hotel staff, and creation of a shared marketing budget.
Support for cooperative interaction	Establishment of partnership mechanisms, training programs, knowledge exchange, and standardized cooperation procedures.	Joint training for personnel, organization of regional promotional campaigns, and creation of an online platform for information sharing among cluster participants.

Source: created by the authors based on [2; 6—7].

tainability of the cluster system in the tourism and hotel-restaurant sector.

It is concluded that the orientation of the methodical foundations should create conditions under which:

1. Joint activities among cluster participants—such as hotels, restaurants, and travel agencies—are effectively developed.
2. Service quality standards and mechanisms for monitoring and improving service are implemented, making the cluster's tourism products more attractive in the market.

Table 4. Methodical foundations of cluster management in tourism and the hotel and restaurant business during the functioning (stabilization) stage

Key aspect	Methodical foundations of cluster management	Example in tourism and hotel & restaurant business
Risk management	Identification and analysis of potential threats, development of risk mitigation strategies	Implementation of insurance coverage for tourism services; preparation of contingency plans for force majeure events (e.g., extreme weather, natural disasters).
Performance evaluation	Monitoring key performance indicators and controlling the achievement of results	Analysis of tourist flows, assessment of customer satisfaction, monitoring hotel and restaurant ratings.
Process optimization	Improvement of internal procedures, increasing operational efficiency, and rational use of resources.	Standardization of booking procedures, coordination of procurement and logistics, implementation of uniform service protocols.
Ensuring structural flexibility	Adaptation to market changes, seasonal demand fluctuations, and integration of new technologies.	Introduction of mobile booking applications, seasonal adjustment of menus and tourism packages, rapid response to market changes.

Source: created by the authors based on [2—3; 5—6].

3. Financial, human, and material resources are used efficiently through coordinated procurement, joint marketing, personnel exchanges, and training programs, thereby reducing costs and enhancing operational efficiency.

4. Economic growth and improvements in the social environment are promoted, generating additional value for the local community and investors.

Thus, well-developed methodical foundations of cluster management are expected to produce a comprehensive effect, resulting in higher operational efficiency among cluster participants compared to their individual activities.

Further research on cluster management in tourism, as well as in the hotel and restaurant sectors, could focus on several key areas. First, a deeper analysis of the relationships between cluster participants and the mechanisms that drive synergy would be valuable, as this could improve the effectiveness of joint projects and optimize resource allocation. Second, exploring the impact of innovative technologies and digitalization on cluster management is promising, particularly in terms of integrating electronic booking systems, customer relationship management (CRM) tools, marketing automation, and data exchange among participants.

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