

NEW TERRITORIAL ORGANIZATION OF TOURISM: TOURISM CLUSTERS, CASE STUDY: THE SOUTH TRANSDANUBIAN CULTURAL TOURISM CLUSTERS (HUNGARY)

Tibor Gonda¹, János Csapó²

¹ *Tourism expert, Managing Director of CampInvest Ltd., e-mail: agondat@t-online.hu*

² *University of Pécs, Faculty of Sciences, Institute of Geography, Department of Tourism, e-mail: csapoj@gamma.ttk.pte.hu*

Abstract: In this study, the authors reveal the functional mechanism and activity of tourism clusters, considering primarily the South Transdanubian Region, which is a fairly analysed topic both from theoretical and practical perspectives. The study provides a thorough insight to the general national and region-specific factors that promote clusterization. Later it concretely examines three tourism clusters that are still operating and functioning in the region. During this process, the authors provide an overall picture of the first steps, establishment, activities, main priorities, organizational and network development, and the innovation ability of the Heritage Tourism Cluster, the Castle and Mansion Tourism Cluster and the Programme and Festival Tourism Cluster.

Key words: clusters, tourism clusters, cultural tourism, South Transdanubia

1 INTRODUCTION – THEORETICAL BACKGROUND

1.1. Defining the term, cultural tourism

Dealing with the topic of tourism clusters – and within this topic, the cultural tourism clusters – first we have to determine the place and role of cultural tourism and also the theoretical background of tourism clusters, both in national and international perspective.

In the 21st century the tourism global market creates an organic and interdependent system in which the supply and demand side experiences significant changes both in time and space and also from the perspectives of the quantitative and qualitative aspects or components. Newer and newer regions and tourism products will be involved in the international and domestic tourism trends, as well and in the ever growing competition. Only such a tourism destination or tourism actors

can survive, which or who can provide an ever growing standard of quality (Csapó, 2012). Richards (2009) states that “Culture and tourism were two of the major growth industries of the 20th century, and towards the end of the century the combination of these two sectors into ‘cultural tourism’ had become one of the most desirable development options for countries and regions around the world.”

According to the recent changes of tourism trends, it is obvious that visitors are more strongly involved in cultural activities than earlier. Although, we have to highlight that the role of the 3S (or 4S as sun, sand, sea and sex) in mass tourism will still be (very) dominant. On the other hand, as the new generations of visitors appear on the tourism market, now we can talk about a new 3S group or generation of tourists, now mainly motivated by sport, spectacle and satisfaction (Csapó and Matesz, 2007). Also we have to stress that one of the most important motivations for a tourism visit is getting more and more as diverse as possible experiences. Some aspects of cultural tourism are summarized in the Tab. 1.

Table 1 Positive and negative effects/impacts of cultural tourism

Positive effects	Negative effects
<ul style="list-style-type: none"> – The development of the regional culture – Protection of the natural habitat – The accentuation of tourism regions – Strengthening of the local traditions and culture – Less seasonal, can extend the tourism season – Can be an important form of sustainable tourism 	<ul style="list-style-type: none"> – Culture become commercialised – Destruction of the environment – Investments in tourism that act against the state of the environment – Architecture not characteristic to the local customs – Carrying capacity problems – Cultural tourism has only a dependent role (need for package) – Conflict source

Source: Based on Horváth (1999), Csapó (2012)

If we take into consideration and observe the impact and importance of cultural tourism on the global tourism market, we have to strongly emphasize that according to the recent research data published by the OECD in 2009 entitled “The Impact of Culture on Tourism”, it seems that almost 360 million international tourism trips worldwide were generated by cultural tourism in 2007, accounting to around 40 % of all global tourism (OECD, 2009). Furthermore, if we take into consideration that these numbers were only directly affecting the tourism industry, we have to stress that the indirect contribution of cultural tourism is naturally even higher, due to its multiplier effects. The mentioned study also stresses that the amount of money spent by a “cultural tourist” is estimated to be as one third more on average than other tourists (Richards, 2009).

In this ever changing system of the tourism industry, the role of cultural tourism is rapidly and constantly growing in the latter decades. We also have to highlight that the positions of the classic mass tourism, often characterised by the 4S (sun,

sand, sea and sex), will be the most dominant form of tourism for a very long period of time.

Without the aim of listing all the definitions on cultural tourism, we would like to emphasize that according to our point of view, the scope of cultural tourism covers those tourism segments that could not be classified to the elements of mass and passive tourism. The classic attractions of cultural tourism can be classified into three groups:

- built and material values (buildings, material values of different art forms),
- the cultural values connected to everyday life (free time, leisure, lifestyle, habits, gastronomy),
- events and festivals (Aubert and Csapó, 2002).

According to our latest knowledge we should presume that the definitions of culture and tourism reflect together the meaning of cultural tourism. In this case this part or area of tourism is a collecting concept, which is multiple and diversified from the point of view of several tourism products with cultural attraction (Csapó, 2012).

1.2. The formation of clusters in general

The first cluster-like organisations started to form in North Carolina, USA in the middle of the 20th century, with the cooperation of the local universities. Its result, later on, was the formation of one of the most developed biotechnological clusters of the world (Roncz, 2007). In the 1950s another very important initiation was formed, the Silicon Valley in California, based on information technology. This region in the following decades became the best practice example of the clusters, which are able to renew themselves, since in the Santa Clara Valley time after time such firms appeared – or already existing ones changed their production direction – which were able to invigorate the economy of the region and also acceded to the significant development of information technology.

In the majority of the most developed countries the cluster policy, the development of clusters and the strengthening of the clustering process formed a growing significance in the field of economic development – especially on the regional level – from the 1990s. According to this, on the level of the European Union the support of clusters was quite early (1993) declared in the document entitled “Growth, competitiveness, employment. The challenges and ways forward into the 21st century” published in the Bulletin of the European Communities. This document in the latter years was followed by numerous further initiatives and guidelines as well in the EU.

At the time of the change of the Millennium, clusters became well known and popular all over the Europe. In a 2006 survey of the Gallup Institute, 20 994 leader of European firms was questioned, and from the answers it clearly turned out that almost 17 % of these firms act as a member of some kind of a cluster, while taking into consideration the firms employing less than 25 workers this rate was almost 25 % (The Gallup Organization Hungary & Gallup Europe, 2006).

Cluster policy acquired a growing significance after the 1990s first on national, regional and later on the community (supranational) level, as well so soon it was

playing an important role in all of the member states' economy and development policies. It could be observed that these development policies concentrated much less on the single firms than primarily to the regional networks and within that the SMEs' local agglomerations.

1.3. Possibilities of clustering in the tourism sector in Hungary

The formation of the tourism clusters is the phenomena only of the recent years in Hungary. The paradigm change, according to which besides the industrial clusters other services branches (such as tourism) were involved in clustering, appeared only in a very slow process.

Within the framework of the first Széchenyi Plan (a former national development plan) in 2000, although the announced RE-1 tender had not forbidden the creation of tourism clusters, it had not even promoted them as a priority. That was the main reason why none of the tourism cluster tenders have been accepted.

The same situation was repeated in the 1st National Development Plan's Economic Competitiveness Operational Programme as well. The real breakthrough was brought by the New Hungary Development Plan (2nd National Development Plan). Within its framework, the Regional Operative Programmes (ROP) strongly preferred the creation of the new clusters and it was also highlighted that from the point of view of the region the creation of the tourism clustering processes should be promoted based on the decisive tourism products. So, the ROP tenders appeared in the financing period after 2007 (more concretely in 2010), legitimising the *raison d'être* of the tourism clusters (Gonda, 2008).

Hereby, we would also like to add that the international focus on tourism clusters started only in 1998 as well, when Porter (1998) first mentions distinctly the tourism clusters (and also the catering and restaurant clusters) when analysing the grape and wine clusters of California (Porter, 1998). In the Hungarian practice, the first tourism cluster, the Pannon Thermal Cluster (Pannon Termál Klaszter) was formed on 22nd June, 2001. This initiation was not only unique in Hungary but – as far as we know – in East-Central-Europe as well, since this was the first tourism cluster in the mentioned macro region. The South Transdanubian Region was also an important initiator in the country, since in year 2000 three tourism cluster initiatives were created (equestrian, congress and spa and thermal), but on the other hand they could not receive any tender support since they were not successful with their applications (at that time).

Besides the important similarities between the tourism clusters and the industrial clusters, we can determine numerous significant differences as well, which can be seen in the difference of the tourism product. The tourism product can be connected to a determined space (location) and time while the industrial product can be dismantled into pieces and can be produced anywhere in the world. On the contrary, the tourism product (ever so complex is) cannot be detached from the location and the time.

As a consequence of a successful cluster activity, outside of the cluster, in its social and economic environment, such favourable processes can be started, which could cause positive externalities for the members of the cluster. In other words, a kind of “public weal” type development can be realised. The development of the tourism attractions can be a good example for this when an actor outside of the cluster (county government, local government) will realise a tourism attraction development in accordance with the aims of a given cluster. Another example can mentioned when the education system reacts to the special needs and demand of the cluster by starting new forms and ways of education. Those special inputs can activate the effective functioning of the clusters, which can directly not be measured during the production process, but their positive impacts cannot be argued either. Such activities are the impacts on the image increase, the increase of reliance on the innovative milieu, and the aggregation of the specialized knowledge as well. As a common effect of these, it would be much more favourable to join a cluster for a certain enterprise than operating separately. The characteristics of the tourism clusters are collected in Fig. 1.

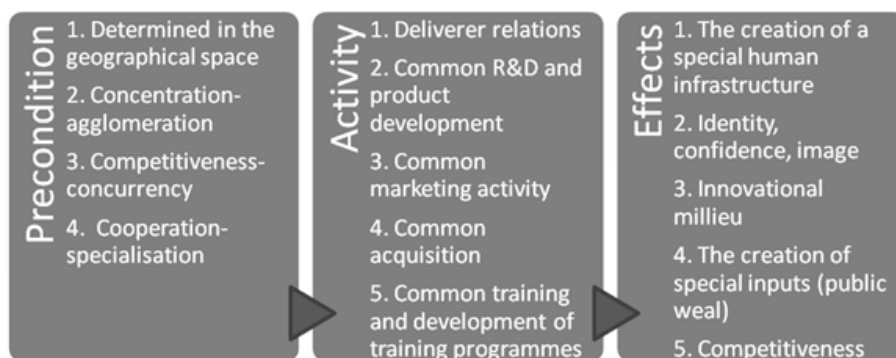


Figure 1 Characteristics of the regional tourism clusters (according to Gonda, 2012)

2 RECOGNIZING COMMON INTERESTS: FIRST STEPS OF ORGANIZING CLUSTERS

During the strategic planning for 2007 – 2013 financing period, the need of new tourism quality in the South Transdanubian Region emerged quite firmly. According to this, available tender resources were needed by the tourism industry in order to finance the development of product-cluster based opportunities. Lobbying of the industry seemed more efficient than in a case of the other regions. It led to the emergence of the tender framework titled as “Development of Tourism Clusters”, which became priority for the South Transdanubian Operational Programme. Numerous professional negotiations took place during the preparation of the tender among which the South Transdanubian Regional Tourism Committee’s recommendation

was prominent. It called for tenders, taking into consideration regional characteristics, in the following eight types of products: medical and thermal tourism, wine tourism, ecotourism, village tourism, horse riding tourism, heritage tourism, programme and festival tourism, castle and mansion tourism.

Actually, the latter three types of tourism products constitute the “joint term” of cultural tourism. That is the reason why the following question emerges: what makes cultural tourism so dominant in the region? Among others, we believe that the answer can be found in the following ideas:

- 1) In respect to cultural tourism, the medium-term strategy of tourism development decided upon significant priorities to which regional planning also adapted itself:
 - a. In order to develop economy, strengthen the power of culture by improving the position of cultural industry, more specifically, by developing and having cultural tourism acknowledged as a significant economic indicator. In relation to this, further development of the creative-cultural industry cluster should be promoted by active participation of cultural tourism participants.
 - b. Enhancing the reputation of cultural touristic attractions, widening market interest by using modern marketing tools.
 - c. Improving availability and accessibility of cultural tourism attractions (improving the fields of info-communication and infrastructure).
 - d. Inserting highlighted cultural programmes into package tours and represent them in the market. The tourist product development based on cultural attraction.
- 2) Since 2003, the project of European Capital of Culture had been vividly debated, and since the fall of 2005 it was a fact that the regional centre, Pécs will get the honoured by this title in 2010. Of course, since that time, every strategic document dealing with tourism treated the issue of cultural tourism as a priority (Berki and Gonda, 2006).
- 3) Early Christian relics of Pécs became parts of the UNESCO’s World Heritage in 2000. The project of exploiting these relics for the sake of tourism was one of the most successful tenders after joining the EU in the financial period of 2004 – 2007. The above mentioned statement is reinforced by the fact that the project won the maximum amount of 1,5 billion HUF. The development drew attention to the importance of heritage tourism even on a regional level.
- 4) The first Hungarian national conference on intellectual/cultural heritage was also organized in Pécs in 2005, which was attended by leaders of international city networks, who took the protection of intellectual heritages in hand.
- 5) A few-year-long close professional cooperation took place in relation to making touristic use of castles. The concept of clusterization was put on paper quite early but because of the shortage of tender financial resources, their activity could only evolve really slowly. However, their reputation among regions was so great that – extended with the mansions on the basis of the Regional Tourism Committee’s suggestion – the opportunity for applying the tender was given.
- 6) The Carnival of the Buso at Mohács – the first to achieve such a title in Hungary – became the part of Cultural World Heritage in 2009. Reputation of the carnival

is clear within the country but it is getting more and more popular among foreigners as well. According to estimations, more than 50 000 visitors come to see the carnival in each year.

- 7) Certain parts of the several thousands of kilometres long Roman limes system have already become parts of the UNESCO's World Heritage. Preparations are still in progress for tendering the Hungarian part of the Limes, including the South Transdanubian territory.

3 ESTABLISHMENT OF THREE CULTURAL TOURISM CLUSTERS

The growing request towards the knowledge of cultural heritage, the importance of preserving heritage and the opportunities of regional development – which can strongly be connected with sustainable development – all contribute to the rising need of connecting professional experiences. The idea of organizing the heritage tourism cluster was due to the above mentioned reasons.

The foundations of establishing clusters root back to 2000 when the concept of World Heritage Management was defined. In 2002, the City of Pécs and the Local Government of Baranya County established the Pécs/Sopiane Heritage Nonprofit Ltd., which later took preparations and tasks related to organizing clusters in hand, and it also coordinated professional tasks. The changing point of view – which resulted at county level in regional extension of locations that were treated as cultural heritage – greatly contributed to establishing regional clusters (Fig. 2). During the preparatory meetings it became clear that they understand and need the exploitation of existing plus value in synergies and their shift to competitive advantages. At the same time, it was recognised that protection and exploitation of heritage demands high level and complex expertise. Furthermore, its management needs special competences. Although this had the most accomplished professional views among the discussed clusters due to – mainly technical – problems it could not achieved major results so far.

A few years ago, with the in-charge management of the South Transdanubian Tourism Public Utility Non-profit Ltd. a cluster-initiative was established for making touristic use of castles. According to its authors, it could have functioned as a part of the earlier discussed cluster but due to the lobbying power of initiators it became a separate association. Establishing the cluster was partly motivated by the members' opinion according to which the impact of the region's castles on tourism was smaller than the potentially expected standard. Later on, representative members of certain castles were supplemented with enterprises having a share in mansion tourism. Although early tasks were focusing on creating common marketing, later innovative product development and human resources development appeared, but we cannot leave the organization of visitor management and any other cluster-specific tasks out of consideration.

The foundation of programme and festival tourism cluster was initiated by the Cultural and Tourism Centre of Baranya County. It recognized the need of a professional union in the light of dynamic growth of interest – within inland tourism – for festivals and other cultural programmes. Out of the three clusters this is the only one that was organized from top down. Despite this, we think, it can maintain its original part. At the same time, we have to add that this is only possible if the cluster will not stop functioning in parallel with the exhausting financial resources after the granted period, more exactly after the summer of 2010. The initial task of the cluster is to clarify what programmes serve for amusement and public education either for a narrower or wider environment, and which ones have real demonstrable effects on shaping tourism in the region. After all, the next goal is to assemble a regional festival calendar with special regard to the idea that festivals supplement each other and do not try to compete with one another in the region. For this reason, the aim of the cluster is to coordinate festivals in both space and time in order to offer visitors a balanced supply.

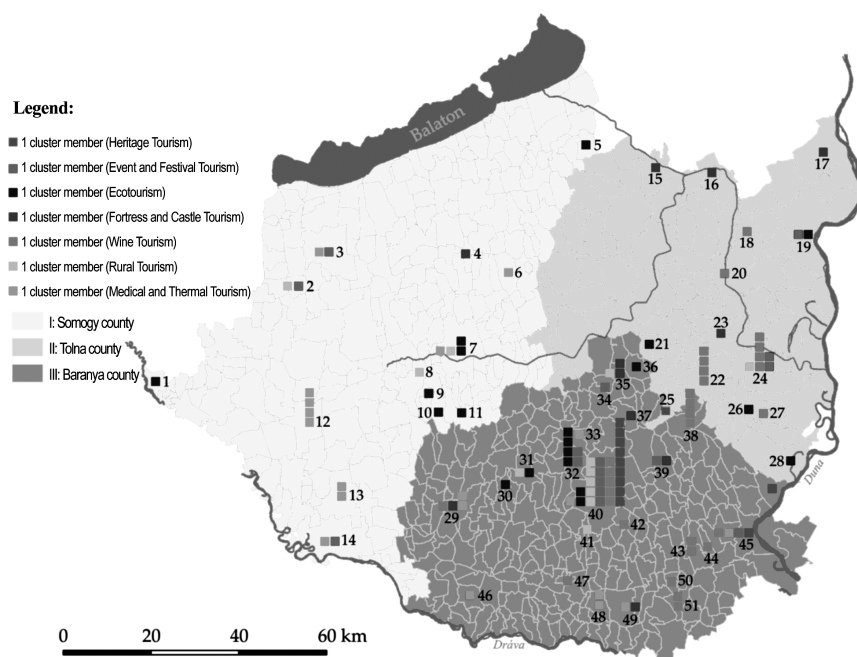


Figure 2 Members of the tourism clusters in the South Transdanubian Region, Hungary. Ed. Gonda, 2012

3.1. Main priorities of the examined clusters

In the case of clusters, it is worth mentioning that they were established mainly because of economic reasons. They are such interactions of managing corporations (or at least corporations that function on the market) where the main goals are to improve efficiency of management and to enhance market action of corporations that participate in the clusters. In accordance with this, the activity of clusters must have an effect on either cost reduction or surplus generation for members through common activities. In order to enhance the efficiency of cluster members' activity and to increase both own and joint competitiveness, the common interest lies within the management corporation's orders that individually could be handled with low efficiency. Cluster members recognized that they can help each other in many ways. Main priorities that were defined within the three clusters are the following:

- Coordination of regional improvements in relation to ecotourism, and in a broader sense, in relation to cultural tourism and establishing a common brand;
- Innovative developments between research places and the locations of heritages, mediating requirements, coordinating developments and marketing programmes – application of unified elements of image;
- Defining the target group, its “coordination”;
- Creating a heritage-map and a competence manual, improving these and continuously upgrade them;
- Improving human resources organized on the common basis of cluster members, coordination and managing supplementary projects and improvements;
- Recognizing common market interests, cooperation with local travel agencies and, by this way, collecting useful information about demands;
- Developing information technology, applying the improved digital technology and initiating the modern CRM system;
- Creating database with respect to performers, craftsmen and other suppliers that are guaranteed to fit into the programmes of castles.

3.2. Cooperation between the University of Pécs and clusters

Innovation and product development are essential factors in the activity of clusters since obtaining new markets is only possible with a fresh and innovative supply. We strongly believe that, institutions of higher education can get exceptional roles in the innovation processes – since their potentials and capital of knowledge determinate them for this –, so they have to take part in them. In order to function effectively, universities may be able to help clusters in many ways: from “fundamental” researches – surveying guests, analysing demands – through revealing “the best international (and other national) practices” to the concrete participation in product development. Furthermore, the campus may be a partner in satisfying the needs of human resources and in ensuring “cheap” but motivated labour-demand by means of students' practices. Of course, in the South Transdanubian region it is the University of Pécs that meets the above mentioned requirements best so. By this

reason, all three clusters urged initiating the institution into the following tasks: creating common database, elaborating motivation research, introducing “the best practice”, establishing a regional heritage-map, ensuring student practice, satisfying special training needs of clusters.

4 ORGANISATIONAL DEVELOPMENT, NETWORK DEVELOPMENT IN CLUSTERS

One success factor of cluster functioning is the creation of partnership relations and network development. For this reason, we think that the goal should be to create and implement such a common programme of action that helps increasing the number of members while, at the same time, strengthens and simultaneously extends the corporation’s “range” by network development. Independent, autonomous organizations and individuals work together as partners in the network and that is the reason why cooperative and not competitive and relatively stable relations characterize partnerships. By reviving synergies, the network gives such a competitive advantage to partners that are impossible to achieve individually. The market requires complexity, heterogeneity and innovation from participants that can be created by cooperation and grouping into networks. So the aim of the cluster is to achieve a synergy-effect by synchronizing the member’s resources, activities, and abilities so its benefits can be used by all the participants.

The goal of cooperation is the synchronized activity of participants in order to increase their joint profit. Participants on the tourist market face new challenges day by day. Demands of guests increase and by this reason cooperation does not only have to keep up with them but has to get ahead of competitors. The intensified competition of destinations, the internationally growing market demand long-term thinking. Guests do not only stay within the borders of a settlement or tourism destination during their holidays, so the strengths of the area and the region have to be exploited jointly on account of improving the supply, attraction has to be increased, and in a long run an ever strengthening destination would be necessary too. This latter can be promoted by the phenomenon according to which the work of regionally organized clusters that result in measurable improvement do not only benefits members but it affects the result of tourist destinations.

If we examine cluster-management with respect to the above mentioned, then we have to notice that the organization has to put great emphasis on creating an exceptional cooperation, searching for new partners, and establishing and accomplishing such strategic partnership goals that promote the success and adaptation of organization into the system of tourism. The cluster-management system serves the interests of cluster members. Its services have business nature. This is a fundamental principle that has to be kept in view by all the three clusters during functioning. Based on this idea, some wishes to establish the Arts&Business model during the organisational development. The aim is to create a verifiable operation with relating quality assurance solving, and embedded self-evaluating elements. Primary goal of

the cluster-management system is to help cluster members by offering services. Network development appears as a highlighted theme of cluster-projects. Overall, along the previously discussed ideas we consider the following ideas relevant:

- Organizing the system of cluster-management, strengthening it, creating and executing joint strategy with cluster members, planning investments;
- Creating heritage tourism and programme tourism packages, developing existing attractions, concentration of products along joint conception, creating adventure tours and thematic parks;
- Developing information technology and websites, joint marketing activity, creating a joint image;
- Creating a touristic supply of heritage in order to present its attractive and interactive nature, emphasizing image related to the region's historic and cultural heritage;
- Strengthening cooperation between participants on tourism, creating a complex supply;
- Strengthening gastronomic segments beyond the natural connection of tourism and hospitality.

5 INNOVATION CONTENT

In the last few years the role of touristic organisations has altered. Parallel with this, newer and newer questions and topics were raised. Earlier organisations had to find the answer – how to sell tourist services. Somewhat simplifying it, for a long time, the main question was – how to let rooms. In order to enhance rents, the supply side started to produce inviting touristic publications and attended travel expositions. Today, the situation is different because the questions are – how to create new, innovative and marketable supply; - how to create and maintain a productive service system; – how to associate supply with quality, target group-oriented product; – how to shape suppliers and services into a homogenous, recognizable unity in the competition of the market.

The stream of knowledge stimulates innovation, so this is something to emphasize in relation to all three clusters. With the knowledge of the above discussed ideas, clusters and its members formulated the following aims: initiation of innovative technologies as tools of demonstration and familiarizing; strengthening activities with high added value; connecting creative industries with the traditional cultural-heritage sector; synchronizing goals of city renewal and heritage; creating institutionalized cooperation between settlements along the protection of heritage and exploitation of heritage; establishing the Regional Association for Public Property.

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Nová územná organizácia cestovného ruchu: prípadová štúdia klastra cestovného ruchu: Klaster kultúrneho cestovného ruchu Južné Zadunajsko (Maďarsko)

Resumé

Ako je možné zistiť po preštudovaní predloženého príspevku, kultúrne pamiatky a ďalší potenciál pre cestovný ruch regiónu Južného Zadunajska predstavuje kompatibilnú bázu pre úspešnú realizáciu regionálneho kultúrneho cestovného ruchu. Potenciálne možnosti Južného Zadunajska pre rozvoj cestovného ruchu sú veľmi priaznivé. Historické pamiatky, ktoré sú významným kultúrnym dedičstvom, ako aj atraktívne vysoko hodnotené kultúrne podujatia, sú základom, ktorý určuje kultúrno-historicky motivované cesty turistov do tohto regiónu.

Možno konštatovať, že v súčasnosti dôležitú úlohu pri rozvoji cestovného ruchu majú pracovníci jednotlivých turistických inštitúcií a firiem pôsobiach v regióne. Predovšetkým na nich je, či sa využijú uvedené možnosti, či sa región adaptuje na požiadavky a výzvy 21. storočia, či bude región pripravený na existujúcu zdravú konkurenciu a prípadnú spoluprácu s inými regiónmi.

Tri organizácie (klaster kultúrneho dedičstva, klaster organizácie a realizácie festivalov a iných kultúrnych programov, klaster spravovania hradov a zámkov) uznali,

že vzájomná spolupráca a organizácia ponuky pre cestovný ruch do sietí a „klasterizácia“ všeobecne, môže priniesť regiónu konkurenčnú výhodu, zníženie nákladov a rast efektivity. Súťaž v oblasti cestovného ruchu je veľmi silná. Turisti, ako nositelia dopytu po službách cestovného ruchu, majú takmer neobmedzené možnosti, čiastočne aj vďaka globalizácii v cestovnom ruchu. Táto skutočnosť vyžaduje od „dodávateľov služieb v cestovnom ruchu“ výraznú komplexnosť, rôznorodosť, kreativitu a inováciu, ak chce región obstáť v konkurencii.

Vymedzením hlavných priorít v regióne v kontexte rozvoja cestovného ruchu, sa rozvinuli intenzívne vzťahy „dodávateľov služieb“ k Univerzite v Pécsi. Vytvorením siete generujúcej nové poznatky pri organizácii cestovného ruchu a inovácie v ponuke, bol urobený zásadný krok k úspechu regiónu. Súčasne s novými poznatkami a inováciami, bude dôležité skvalitňovanie doteraz ponúkaných služieb a udržiavanie existujúcich programov. Pochopiteľne, dôležité bude aj zabezpečovanie potrebných finančných prostriedkov.