

CLUSTERS IN THE TOURISM SECTOR

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- Clusters in the tourism sector can help attain high levels of social and economic development
- Clusters in the tourism sector have now become a key factor of tourism planning
- Clusters in the tourism sector stem directly from SME development

Questions raised by the design of cluster development for international tourism

- Why is clustering essential to tourism development ?
- What are the criteria for clustering tourism development ?
- What are the impacts and limitations of clusters in the tourism sector ?

REVELANCE OF CLUSTERING FOR TOURISM DEVELOPMENT

- International tourism boom
- Major international imbalances
- Economic and environmental risks of excessive arrivals and spending

REVELANCE OF CLUSTERING FOR TOURISM DEVELOPMENT

- International tourism trends

Year	Arrivals(000,000)	Income (in US\$ billion)
1970	165	17
1980	284	103
1990	455	261
2000	697	477
2020	1,600	2,000

REVELANCE OF CLUSTERING FOR TOURISM DEVELOPMENT

- Major international imbalances
- Tourism receipts and arrivals are concentrated in Europe, North America (USA and Canada) and East Asia Pacific
- In 2004, these three regions netted 84,7% of arrivals and 87,2% of income
- This leaves 15,3% of arrivals and 12,8% of tourism income for Africa, Latin America and the Caribbean

REVELANCE OF CLUSTERING FOR TOURISM DEVELOPMENT

- Economic and environmental risks brought by excessive arrivals and receipts
- High geographical concentrations of arrivals could jeopardise tourism development and undermine its very foundations
- This has already happened at certain destinations which face problems of restructuring due to low-quality accommodation, congested traffic, environmental degradation of seas, beaches and coasts, noise pollution and general environmental pollution

CRITERRIA FOR CLUSTERING SUSTAINABLE TOURISM DEVELOPMENT

- Factors of sustainable tourism planning
- Environmental factors
- Socio-economic factors
- Tourism investment grid

CRITERRIA FOR CLUSTERING SUSTAINABLE TOURISM DEVELOPMENT

- Factors for clustering tourism planning
- Sustainable planning is essential to clusters in the tourism sector
- Tourism has specific features that distinguish it from other economic sectors
- Tourism companies are unusual in that they share traits of both labour-intensive enterprise and heavy industry

CRITERRIA FOR CLUSTERING SUSTAINABLE TOURISM DEVELOPMENT

- Environmental factors
- Biodiversity and ecosystem vulnerability
- Waste treatment
- Land occupation
- Water consumption
- Atmospheric protection

CRITERRIA FOR CLUSTERING SUSTAINABLE TOURISM DEVELOPMENT

- Socio-economic factors (key components of clusters in the tourism sector)
- Tourism product differentiation
- Maximizing the value of traditional know-how and specialization
- The rate of return on large investments
- The excellence of related service (air transport and telecommunication)
- Local satisfaction

Socio-economic factor- tourism product differentiation

- From each country's particular characteristics in terms of natural and cultural resources
- Depends on standards of quality in the tourism sector
- Specific measures are necessary in numerous countries to introduce tourism quality evaluation systems based on indicator directly applicable to all tourism and hotel businesses, including SMEs and micro-enterprises

Socio-economic factor- tourism product differentiation

- Example of differentiation by quality: the “design hotels” in Europe combine cultural differentiation with a high level of quality:
- Hotel Josef in Prague (Czech Republic)
- Hotel Arts in Barcelona (Spain)
- Hotel The Three sisters in Tallinn (Estonia)
- Hotel Levante Parliament in Vienna (Austria)
- Hotel Palafitte in Neufchatel (Switzerland)
- Hotel Fresh in Athens (Greece)
- Hotel Dylan Amsterdam in Amsterdam (Netherlands)



Hotel Josef (Czech Republic)



Palafitte (Switzerland)



Three sisters (Estonia)



Fresh hotel (Greece)



Arts hotel (Spain)

Socio-economic factor- Maximizing the value of traditional know-how and specialization

- One of the main ways to lay a solid basis for differentiation
- Brand-name, quality products can help to realize traditional handicrafts and know-how based on cultural and natural resources with benefits flowing to the poorest population segments

Socio-economic factor- The rate of return on large investments

- Essential conditions for investors to expand their activities with new investments
- A good return on investment also generates positive effects on employment and incomes

Socio-economic factor- The excellence of related services (air transport and telecommunication)

- Tourism investments are not enough to ensure tourism development
- Tourism is but one link in the chain of products and service—every link must offer the same guarantees of quality
- The same applies to tourism-related services, and air transport and telecommunications in particular

Socio-economic factor- Local satisfaction

- Key consideration of sustainable tourism planning and development
- Ration of host population satisfaction can be determined by:
 - Ratio of hotel infrastructure usage by host population
 - Ratio of restaurant infrastructure usage by host population
 - Ratio of tourism project sports facility usage by host population
 - Ratio of tourism-project cultural infrastructure usage by host population

CRITERIA FOR CLUSTERING SUSTAINABLE TOURISM DEVELOPMENT

- Clusters in tourism investment evaluation

EXAMPLES OF REFERENCE INDICATORS :

Type of ratio	% area tourist use / total area	% liquid waste treated	% solid waste treated	Water consumption per room	Average and maximum height of constructions	Jobs created per room / place	% of staff receiving continuing training	% of local frequen-tation (turnover)	Crime rate per tourist (%)	Distance to nearest doctor	% cultural expenses	Information (protection of children)	Existence of a labour agreement	% local purchases / total purchases	Participation in concerted action to protect the environment	Existence of access to new technologies
Reference evaluation	not more than 35	not less than 70	not less than 80	not more than 1500	not more than 15	not less than 2	not less than 15	not less than 6,19	not more than 2	equal to 0	not less than 0,03	yes	yes	not less than 90	yes	yes
Reference unit	%	%	%	litre	metre	ratio	%	%	%	km	%	yes / no	yes / no	%	yes / no	yes / no

Source : BTDC (Bali Tourism Development Corporation), March 2000

IMPACT AND LIMITS OF CLUSTERS IN THE TOURISM SECTOR

- Integration of tourism into overall economic development
- Incentives for public/private partnership and decentralized decision making
- Training for tourism development players

IMPACT AND LIMITS OF CLUSTERS IN THE TOURISM SECTOR

- Three main basic strategies:
 - Engaging tourism with the development of other economic sectors
 - Incentives for public/private partnerships and decentralized decision making
 - Lanching of training for all tourism development stakeholders

- Training for the tourism development stakeholders
 - Criteria for sustainable tourism and development
 - Environmental awareness and conservation
 - Awareness of social and cultural heritages
 - Natural dangers
 - Endangered species legislation
 - Environment legislation
 - International environmental legislation
 - Ecology and criteria for awarding "green" seals of approval

Conclusion

New forms of tourism clustering have a major role to play in sustainable development by helping focus all the economic development players towards achieving a common goal that enables the enhancement of economic impacts and guarantees efficiency and sustainability