

## II. ГЕОГРАФІЯ РЕКРЕАЦІЇ ТА ТУРИЗМУ

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### STRATEGIC DEVELOPMENT PLAN FOR RURAL TOURISM BASED ON A CLUSTER MODEL (EXAMPLE OF CHERKASY REGION)

**Background.** Modern rural development in Ukraine necessitates innovative solutions, as communities face demographic decline and economic pressures. The implementation of tourism clusters has emerged as a promising mechanism for enhancing local resilience and strengthening cooperation among key stakeholders. Collaborative Ukrainian-Estonian initiatives carried out from 2021 to 2024 provide evidence of the positive impact of shared expertise, hackathons, and networking on shaping community-based tourism strategies. These projects underscore the increasing significance of tourism in diversifying rural economies and fostering a professional environment for sustainable regional development.

**Methods.** The research methodology combined social and economic-organisational approaches, which allowed for a comprehensive assessment of communication processes and the potential for partnership interaction within rural communities. Primary data were collected through surveys (over 250 interviews) and a hackathon, which provided an opportunity to test hypotheses, evaluate the level of cooperation between stakeholders, and identify opportunities for forming tourism clusters.

**Results.** This article discusses the modern transformations of rural territories within the context of the transition from a productive to a post-productive development model, as well as the role of tourism in these processes. It highlights the key characteristics of rural areas and examines the range of tourism and recreational activities that contribute to the attractiveness of rural spaces. It is shown that the development of rural tourism contributes to economic diversification, the preservation of cultural heritage, the strengthening of social cohesion, and an improvement in quality of life. At the same time, the sector's limitations are outlined, including its fragmentation, lack of competencies, and limited financial resources. Based on the results of stakeholder surveys and a practical hackathon in the Cherkasy region, key challenges and strategic opportunities for the development of rural tourism are identified. The effectiveness of a cluster approach for uniting businesses, communities, authorities, and educational institutions to create a competitive tourism product is demonstrated. The importance of international experience, particularly Estonian, for enhancing institutional capacity and the sustainability of regional tourism clusters is emphasised. The article offers strategic guidelines for the development of rural tourism as a tool for sustainable territorial development in Ukraine.

**Conclusions.** The transformation of rural tourism is only possible through stable cooperation among all participants, based on mutual trust and respect. The cluster approach serves as a key mechanism for development, capable of ensuring economic diversification, preserving cultural heritage, strengthening social cohesion, and creating a competitive and sustainable tourist region.

**Keywords:** rural tourism, cluster approach, tourist clusters, development of rural areas, economic diversification, Cherkasy region.

#### Background

Modern challenges faced by rural areas of Ukraine, particularly depopulation, economic decline, and limited access to investment resources, require new approaches to rural economic development. One of the promising ways is the implementation of cluster strategies, which enable the combination of efforts from local communities, businesses, government bodies, and educational institutions to achieve synergy in the development of priority industries. Tourism, particularly in rural areas, is a powerful driver of economic growth, capable of stimulating the creation of new jobs, the development of infrastructure, and the preservation of cultural heritage.

An example of the importance of establishing communication, developing regional networking and cooperation, sharing experiences, and implementing a cluster-based approach to rural economic development through tourism is represented by two joint Ukrainian-Estonian projects carried out by the Department of Country Studies and Tourism of Taras Shevchenko National University of Kyiv in cooperation with Tallinn University.

Between 2021 and 2023, the Department of Country Studies and Tourism at the Faculty of Geography, Taras Shevchenko National University of Kyiv, participated in the Ukrainian-Estonian project "Improvement of Small Businesses and Development of the University Education System through Research and Promotion of Tourism Clusters in Rural Areas in Ukraine." Project leader: Mart Reimann, Associate Professor of Recreation Management at Tallinn University. The project, financed by the Estonian Centre for International Development, was launched in May 2021, and its fieldwork phase lasted from December 2021 to March 2023. As a result of this work, a round table entitled "Development of Rural Tourism Clusters in New Realities" was held on May 12, 2023, in the Red Building of Taras Shevchenko National University of Kyiv. The event was attended by representatives of the academic community, local authorities, entrepreneurs, the Union for the Promotion of Rural Green Tourism in Ukraine, and the Embassy of Estonia in Ukraine. The project's research results and success stories were presented during the event, demonstrating the flexibility and resilience of entrepreneurship in Ukrainian rural tourism (Fig. 1, 2).

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**Fig. 1. The expedition team together with the village head, Mykola Kuryvchak. Zmiivka village, Kherson region.**  
*The "Salt Road" cluster. It is a candidate for the "Wine and Taste Roads of Kherson Region" cluster*



**Fig. 2. The expedition team together with Serhii Tolstikhin, Horaivka village near Bakota, Khmelnytskyi region. May, 2022.**  
*Serhii Tolstikhin is a community-based tourism development expert, a member of the Union for the Promotion of Rural Green Tourism of Ukraine, a communications coordinator of the All-Ukrainian Initiative "Active Community", and the owner of the green estate "Traveller's House" in Bakota*

In 2023–2024, cooperation between the universities continued within a new project, "Diversification of Rural Economies through the Network of Community-Based Tourism Consultation Centres", also headed by Assoc. Prof. Mart Reimann. The project organisers included the Estonian Rural Tourism Association, the Estonian Centre for International Development, and the Union for Promoting Rural Green Tourism in Ukraine. The project covered seven regions of Ukraine – Zaporizhzhia, Dnipropetrovsk, Kharkiv, Sumy, Zhytomyr, Cherkasy, and Kyiv – and united local entrepreneurs, community representatives, local authorities, educators, and scientists. The project's primary objective was to develop a concept for a network of community-based tourism consultation centres, based on the members of the Union for the Promotion of Rural Green Tourism in Ukraine, taking into account the best European practices for rural economic diversification. The central focus was on identifying needs, challenges, and opportunities for tourism development. As part of the project, a series of hackathons was held in each region, using interactive methods such as brainstorming and participatory mapping to create "maps of needs, problems, and solutions." The final hackathon occurred on December 14, 2023, at the Kholodnyi Yar National Nature Park (Ethnographic Complex "Dykyi Khutir" (Wild Homestead), Buda Hamlet, Cherkasy region) (Fig. 3). The event aimed to promote rural tourism, support economic diversification, and consolidate civic, academic, and business initiatives for economic growth in the post-war period. Taras Shevchenko National University of Kyiv acted as a partner and coordinator of the event. The Department of Country Studies and Tourism, represented by Dr Nataliia Dovhan (PhD in Geography) and student Inna Tarabarova, was responsible for organising and moderating the

hackathon, developing its program, and preparing the final report as part of the overall project documentation. The project's culmination was the final training and conference "Diversification of Rural Economies through Community-Based Tourism", which took place on May 16–17, 2024, in the Red Building of Taras Shevchenko National University of Kyiv. Representatives of academic institutions, local authorities, business structures, the Academy of Rural Development, the Union for the Promotion of Rural Green Tourism in Ukraine, and the Embassy of Estonia in Ukraine attended the event. The conference presented the results of the two stages of cooperation, increased awareness of the role of tourism in diversifying the rural economy, fostered partnerships between Ukrainian and Estonian experts, and contributed to the formation of a professional network for sustainable rural development.

The outcomes of these collaborative initiatives strengthened academic and professional ties between Ukraine and Estonia, laying the groundwork for further research into sustainable rural development and community well-being.

#### Methods

Effective communication is a key condition for successful partnerships and the enhancement of local communities' well-being. This study applied two complementary approaches: social and economic-organisational. The social approach involved analysing the socio-economic transformations of small (rural) territories through the strengthening of communication and the development of network connections within the community, while the economic-organisational approach focused on establishing a partnership system among key stakeholders capable of evolving into a sustainable cluster-based cooperation.



**Fig. 3. The final hackathon took place on December 14, 2023, at the Kholodnyi Yar National Nature Park (Ethnographic Complex "Dykyi Khutir"), Buda Hamlet, Cherkasy Region**

To implement the social approach, a survey was conducted, which allowed the collection of primary data on the state of communication, needs, motivations, and the perspectives of stakeholders regarding the development of local tourism initiatives. The survey results provided the basis for a more in-depth analysis of partnership interactions.

To refine and expand these data, as well as to assess the potential for an effective stakeholder partnership system, a hackathon was organised. The application of the economic-organisational approach during the hackathon made it possible to evaluate the level of communication and collaboration among communities, businesses, local authorities, and the educational sector, and to identify the potential for creating tourism and recreation clusters to enhance the well-being of rural populations.

The survey was employed as a qualitative method for collecting primary information, aiming to identify the views, needs, motivations, and assessments of the target audience. This method enabled the coverage of a broad sample of respondents and the collection of meaningful empirical data for further analytical processing. The questionnaire consisted of 30 open-ended questions, grouped into four thematic blocks: cluster cooperation, the benefits of joint work within the cluster for its members, the role of tourism in regional development, and the advantages of cluster-based cooperation in developing a tourist destination. This structure enabled a comprehensive examination of participants' experiences, level of awareness, expectations, and behavioural characteristics. The survey was conducted in person during field expeditions, which

enhanced the quality of communication and allowed the researchers to ask clarifying questions in real time.

Within the research framework, more than 250 interviews were carried out with rural tourism stakeholders across various regions of Ukraine, providing a solid empirical basis for identifying key development trends and regional specificities. The gathered information formed the foundation for developing general conclusions and recognising key trends in development.

A hackathon was employed as an innovative, qualitative, and practice-oriented research method aimed at generating new solutions and gaining a deeper understanding of the problem situation through group interaction. Unlike the survey, this method engages participants in active, creative work, allowing researchers to capture their practical skills, decision-making logic, and ability to collaborate effectively.

During the hackathon, participants worked on specific cases, developing prototypes, ideas, and concepts to address these challenges. This made it possible to gain in-depth insights into how they perceive the problem, the approaches they propose, and the barriers and opportunities they identify in the process. Team discussions, project presentations, and expert evaluations provided additional qualitative material for analysis.

The use of the hackathon as a research method enabled the testing of hypotheses formulated based on the survey, the identification of innovative proposals and unconventional solutions, and the assessment of the practical relevance and applicability of theoretical models.

**Results**

Modern transformations in rural areas are closely linked to the shift from a production-based economy to a service-oriented economy, which has generated new social relations shaped by skills, qualifications, consumption patterns, and civic responsibility.

We propose three key characteristics that define rural areas:

1. *Population density and settlement size.* Rural areas typically exhibit low population density and are predominantly characterised by natural or semi-natural environments. In tourism, the appeal lies less in absolute numbers and more in the contrast between visitors' urban backgrounds and the rural experience they encounter. Sparsely populated areas often attract tourists seeking tranquillity, nature, and an escape from urban life.

2. *Land use and economic activity.* Traditionally, rural economies have relied on agriculture, forestry, or resource extraction. However, the distinction between rural and urban economic activities is increasingly blurred, particularly in developed countries. The decline of agricultural dominance

and the growth of service-oriented sectors, including tourism, have created new economic opportunities. Regions with marginal economies may derive greater benefits from tourism development, while economically diverse rural areas may rely less on it.

3. *Traditional social structures.* Rural communities are often perceived as preserving traditional values, slower-paced lifestyles, and stronger local cohesion compared to urban societies. This perception can attract tourists seeking authentic cultural experiences. When managed effectively, tourism can support and sustain local traditions; when mismanaged, it risks disrupting social structures and undermining the very attractions that draw visitors.

The concept of "rural tourism" shares its origins with the concept of "alternative tourism" and is similarly defined through negation: it is non-urban (rural), not beach-oriented (non-hedonistic), non-mass (individual or small-group), and self-organised rather than packaged. Thus, the appeal of rural areas extends beyond their landscapes and attractions to include the types of tourism they offer (see Table 1).

**Table 1**

**Spectrum of Tourism and Recreation Activities in Rural Areas**  
(Koroma, 2022, extended by the author)

Type of Tourism	Tourism and Recreation Activities	
<b>Active Tourism</b>	<ul style="list-style-type: none"> <li>• Hiking (trails, fitness paths, nature parks)</li> <li>• Horseback riding</li> <li>• Motor tourism (trail riding, all-terrain vehicles, car tours)</li> <li>• Village or city tours</li> </ul>	<ul style="list-style-type: none"> <li>• Adventure holidays/desert trips</li> <li>• Cycling and mountain biking</li> <li>• Cross-country skiing</li> <li>• Camping and survival trips</li> </ul>
<b>Cultural Activities</b>	<ul style="list-style-type: none"> <li>• Archaeology and heritage exploration</li> <li>• Visits to local industrial, agricultural, or craft enterprises</li> <li>• Museums and cultural centres</li> <li>• Craft courses and workshops</li> </ul>	<ul style="list-style-type: none"> <li>• Artistic expression workshops</li> <li>• Folklore and traditional music ensembles</li> <li>• Cultural, gastronomic, and thematic routes</li> <li>• Local festivals and heritage events</li> </ul>
<b>Water-related Activities</b>	<ul style="list-style-type: none"> <li>• Fishing</li> <li>• Swimming</li> <li>• River and canal tourism (houseboats, narrowboats, barges)</li> <li>• Canoeing, kayaking, and rafting</li> </ul>	<ul style="list-style-type: none"> <li>• Windsurfing and paddleboarding</li> <li>• Speedboat racing</li> <li>• Sailing</li> <li>• Aquaparks and water-based entertainment facilities</li> </ul>
<b>Health-related Activities</b>	<ul style="list-style-type: none"> <li>• Fitness and wellness tours</li> <li>• Spas, wellness resorts, and rehabilitation centres</li> </ul>	<ul style="list-style-type: none"> <li>• Yoga and meditation retreats in nature</li> <li>• Rehabilitation</li> </ul>
<b>"Passive" Activities</b>	<ul style="list-style-type: none"> <li>• Relaxation in rural areas</li> <li>• Outdoor nature observation, including birdwatching and wildlife photography</li> </ul>	<ul style="list-style-type: none"> <li>• Landscape and scenic viewing</li> <li>• Picnicking and leisure in natural settings</li> </ul>
<b>Aerial Activities</b>	<ul style="list-style-type: none"> <li>• Light aircraft flights</li> <li>• Hang gliding and ultralight aviation</li> </ul>	<ul style="list-style-type: none"> <li>• Hot air balloon rides and aerial sightseeing</li> </ul>
<b>Sports Activities</b>	<ul style="list-style-type: none"> <li>• Under natural conditions:                             <ul style="list-style-type: none"> <li>✓ Rock climbing</li> <li>✓ Orienteering</li> <li>✓ Hunting</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Under constructed/modified conditions:                             <ul style="list-style-type: none"> <li>✓ Tennis</li> <li>✓ Golf</li> <li>✓ Low-intensity alpine skiing</li> <li>✓ Adventure rope courses and zip-lining</li> </ul> </li> </ul>
<b>"Signature" Events</b>	<ul style="list-style-type: none"> <li>• Rural sports festivals</li> <li>• Agricultural/agrarian festivals and fairs</li> </ul>	<ul style="list-style-type: none"> <li>• Local harvest celebrations and food fairs</li> </ul>
<b>Business and Incentive Tourism</b>	<ul style="list-style-type: none"> <li>• Small congresses and conferences</li> <li>• Corporate retreats and incentive trips</li> </ul>	<ul style="list-style-type: none"> <li>• Professional workshops and training events</li> </ul>

The transition to a post-productivist rural landscape represents a profound transformation of rural functions and structures. Traditional production-oriented activities, primarily aimed at serving urban markets, are gradually being supplemented – and in some cases replaced – by activities focused on consumption, experiences, and leisure, which urban residents increasingly value. Although agriculture remains the main form of land use, it is steadily losing its dominant role within the rural economy, society, and political sphere, creating space for new sectors such as

tourism, recreation, and cultural or creative initiatives. Post-productivism is characterised by economic diversification, pluriactivity, environmental awareness, dynamism, and growing social heterogeneity. As a result, rural areas are becoming increasingly diverse in terms of land use, social composition, economic activities, governance structures, and local authenticity.

Within this context, rural tourism has emerged as a key aspect of post-productivist transformation, offering substantial potential for sustainable territorial development.

It contributes to local development by revitalising and reorganising the rural economy, improving the quality of life, and generating additional income in the agricultural, craft, and service sectors through tourism activities. Moreover, rural tourism allows communities to unlock the economic potential of distinctive food production, abandoned or historic buildings, unique landscapes, and cultural assets. It creates opportunities for social interaction between hosts and visitors, helping to mitigate the isolation of remote areas and marginalised social groups, while also fostering a re-evaluation of local heritage, environmental resources, and rural identity. In doing so, rural tourism supports development strategies that aim to balance ecological, economic, and social sustainability.

At the same time, rural tourism remains a relatively fragile component of rural development due to several constraints. Initial investments, business creation, and job opportunities are often limited by the sector's small scale and fragmentation, resulting in low returns on investment. Successful development requires a wide range of skills and competencies; yet, many rural entrepreneurs – including farmers, small-town residents, and local officials – often lack professional training in tourism management. Micro-enterprises with limited financial capacity conduct most activities, and access to capital is frequently scarce. Additionally, the timeframe for achieving measurable success is typically short, which further constrains the sector's growth and stability.

Table 2 summarises the socio-economic, cultural, and physical impacts of tourism and recreation on rural areas.

Table 2

List of impacts of tourism and recreation in rural areas and on rural areas  
(Koroma, 2022, extended by the author)

Type of Impact	Socio-economic	Cultural	Physical: Built and "Natural"
<b>Positive</b>	<ul style="list-style-type: none"> <li>• Provides a source of new, alternative, or additional income and employment</li> <li>• Helps reduce gender and other social imbalances</li> <li>• Encourages collective community activity</li> <li>• Creates opportunities to retain population in areas that might otherwise experience depopulation</li> <li>• Stimulates resettlement of territories</li> <li>• Generates a general multiplier effect, though usually lower in rural areas</li> <li>• Enhances local entrepreneurship and small business development</li> <li>• Improves local infrastructure and public services (roads, communications, healthcare, etc.)</li> <li>• Attracts external investments and stimulates local market growth</li> </ul>	<ul style="list-style-type: none"> <li>• Revitalisation of local culture</li> <li>• Fosters a sense of local pride, self-respect, and identity</li> <li>• Promotes intercultural exchange and understanding between visitors and residents</li> <li>• Encourages preservation and reinterpretation of traditional crafts, festivals, and folklore</li> </ul>	<ul style="list-style-type: none"> <li>• Contributes to the preservation and protection of nature</li> <li>• Supports the reconstruction and reuse of abandoned facilities</li> <li>• Promotes the conservation of landscapes and biodiversity through sustainable tourism practices</li> <li>• Stimulates environmental awareness and education among residents and visitors</li> </ul>
<b>Negative</b>	<ul style="list-style-type: none"> <li>• Economic leakages</li> <li>• Local price inflation</li> <li>• Labour migration</li> <li>• Distortion of local employment structures</li> <li>• Deformation of the local housing market</li> <li>• Reinforcement of perceptions of women's employment as low-paid and part-time</li> <li>• Development complexes with weak local economic linkages</li> <li>• Seasonal demand patterns</li> <li>• Overdependence on tourism as a single source of income</li> <li>• Inequality in the distribution of tourism benefits within the community</li> </ul>	<ul style="list-style-type: none"> <li>• Distortion of local "culture" through its commodification and artificial creation of authenticity</li> <li>• Destruction of indigenous culture</li> <li>• Loss of traditional values and social cohesion due to commercialisation</li> <li>• Conflicts between residents and tourists caused by differing social norms or behaviours</li> </ul>	<ul style="list-style-type: none"> <li>• Destruction of natural habitats</li> <li>• Litter, waste, and other forms of pollution</li> <li>• Traffic congestion</li> <li>• Spread of new construction, often as extensions of existing settlements</li> <li>• Overuse of natural resources (water, land, energy)</li> <li>• Visual pollution and landscape degradation due to uncontrolled development</li> <li>• Increased risk of natural hazards due to environmental mismanagement (e.g., erosion, flooding)</li> </ul>

In the context of global trends, rural tourism and recreation are shaped by several dynamic processes. Rural tourism has become one of the fastest-growing segments of the global tourism industry, reflecting the increasing diversification of leisure preferences. At the same time, rural territories are undergoing post-productive and post-industrial transformations, where tourism often catalyses sustainable rural development, necessitating the application of strategic planning tools.

Rural tourism today plays a crucial economic role at both national and regional levels. It is increasingly utilised as a

means of constructing and projecting regional or national identities – sometimes even without the direct participation or consent of residents. As a result, tourism and recreation have become central elements in policy discussions concerning the development and preservation of rural territories, shaping local development strategies.

Moreover, many rural regions are now deeply embedded in national and international political and economic networks. Growing mobility of people, goods, and information can weaken the autonomy of local communities, while the delocalisation of economic activities complicates

the understanding of rural areas as homogeneous economic regions. Rural spaces are also increasingly assigned specialised functions – ranging from tourist destinations to protected areas or development zones – forming new, often non-localised networks. In many cases, these spaces serve users who are not part of rural communities and may function independently of traditional rural livelihoods.

Given these dynamics, rural space should be understood primarily through the lens of its residents – as a social entity where people interact and engage in activities such as leisure and tourism. This perspective highlights the importance of meticulous tourism planning and management in preserving the character of rural communities and ensuring their long-term sustainability and well-being.

Establishing effective communication among local development stakeholders is a prerequisite for enhancing community welfare, diversifying regional economies, and transitioning toward a cluster-based cooperation model. One of the most effective forms of socio-economic interaction is the cluster approach, which is founded on the principles of partnership, complementarity, and innovation. Clusters are regional networks of enterprises, organisations, and educational and research institutions, united by common goals, shared resources, and territorial proximity (Porter, 1998). Their operation fosters social capital, encourages innovation, and strengthens collaboration among participants, creating conditions for sustainable economic growth within the region.

The cluster approach is particularly relevant in rural development, as it integrates economic, social, and cultural dimensions. For rural communities, clusters serve not only as a tool to enhance the competitiveness of local businesses but also as a mechanism for social integration, built on trust, knowledge exchange, joint learning, and partnership relations. The effective functioning of such clusters depends on local resources, cultural heritage, and the natural potential of territories, which together ensure their uniqueness and long-term viability.

The strategy for establishing a tourism cluster encompasses several key areas: developing general and specialized tourism infrastructure; expanding a modern hotel base; fostering a culture of hospitality as a prerequisite for high-quality tourist services; strengthening the partnership network among tourism stakeholders; creating an integrated system for promoting the cluster's tourism products; implementing innovative management practices and coordinated marketing policies to improve service quality and increase tourist flows; and establishing an idea bank to initiate joint projects.

Applying a cluster-based approach to tourism and recreational resources offers additional opportunities for rural development. Natural landscapes, historical and cultural landmarks, and traditional heritage can form the foundation for recreational tourism clusters that integrate communities, businesses, and government into a unified development management system (Butler, & Hall, 1998). Such cooperation not only stimulates economic growth but also promotes ecological sustainability, strengthens local identity, and enhances the well-being of rural populations.

Tourism within a cluster-based approach acts as a powerful driver for the development of small and medium-sized enterprises, contributing to job creation, strengthening social ties, and supporting the emergence of sustainable, self-sufficient communities. Although the concept of a "cluster" is defined differently by various authors, most interpretations emphasise several shared characteristics. INNO Germany AG (2010) notes that clusters typically

involve a geographical concentration of interconnected companies that operate within the same region and within the same industry or supply chain. These companies, as Porter (1998) explains, share similar resources, markets, and strategic orientations, and face comparable opportunities and challenges. Another essential characteristic is the existence of a critical mass of actors, resources, and competencies, which ensures long-term cooperation and attracts new participants; such a mass is assessed both relative to clusters in other regions and compared to potential cluster formations within the same territory (Andersson et al., 2004). Equally important is the interaction among cluster members, who simultaneously cooperate and compete, maintaining continuous engagement (European Commission, 2008; Andersson et al., 2004).

Building on these foundational features, Porter and Ketels (2009) and Ketels (2011) identify four determinants of cluster success. They highlight the significance of geographical proximity, which facilitates logical grouping and resource integration, the presence of a sufficient number of participants, the complementarity among cluster members in terms of technologies, market segments, or activities, and, crucially, the willingness of these members to cooperate. Additional determinants have been outlined through content analysis by Gajšek and Kovač (2016), who distinguish between external and internal factors. External factors, which lie beyond the direct influence of cluster management, encompass institutional support, infrastructure development, labour force qualifications, market maturity, competition, and demand conditions. Internal factors, which can be shaped by cluster management, include the formation of a shared vision and strategy, identification of common priorities, development of organisational structures and culture, and establishment of shared information systems.

Researchers such as Lorleberg et al. (2010) stress that trust among cluster participants serves as the foundation on which all other success factors are built. Without trust, even well-designed strategies or favourable infrastructural conditions cannot ensure effective cluster functioning. Therefore, creating strong communication channels and fostering internal network relationships becomes a primary condition for successful cluster development.

Clusters ultimately provide businesses with shared benefits through integrated value chains and production processes, facilitating collective learning, knowledge exchange, and resource sharing. While natural resources remain relevant for regional development, the ability of clusters to generate added value and ensure competitiveness in international markets is even more decisive. As a result, strong and well-functioning clusters enhance the socio-economic resilience of cities, regions, and entire countries, forming an essential element of territorial competitiveness.

In Ukraine, rural development policy, as defined in Articles 403–404 of Chapter 17, "Agriculture and Rural Development," Section V, "Economic and Sectoral Cooperation," of the EU-Ukraine Association Agreement, focuses on strengthening cooperation between the parties through gradual policy and legislative alignment (Association Agreement..., 2014). This cooperation involves fostering mutual understanding of agricultural and rural development policies, facilitating the exchange of knowledge and best practices to enhance the economic well-being of rural communities, disseminating expertise through training and information initiatives, supporting innovation through research and agricultural advisory

systems, and introducing effective policy support mechanisms (Ministry of Agrarian Policy and Food of Ukraine, 2024). As noted earlier, meaningful economic outcomes can be achieved only when a stable and efficient communication network is in place.

Over the past decades, Ukrainian rural areas have experienced multiple transformations that were often neither strategically oriented toward development nor conducive to long-term success. As a result, many residents have lost confidence in their own potential and the prospects of their territories, which, in turn, has contributed to increasing social isolation.

The analysis of a survey conducted among rural tourism stakeholders reveals significant social and economic challenges that shape contemporary rural development processes. Respondents frequently reported a sense of losing traditional identity and expressed concerns about being marginalised in national decision-making structures, which they perceive as increasingly urban-centred and centralised. The findings indicate that social isolation in rural areas is not an isolated issue but rather reflects a combination of interrelated problems – unemployment, low skills, low income, inadequate housing options, limited access to healthcare, and family instability – that jointly contribute to the broader phenomenon of social exclusion, a tendency also highlighted in earlier studies (Roberts, & Hall, 2001).

Survey responses confirm that, unlike in urban environments where marginalised groups tend to cluster in dense neighbourhoods, rural exclusion is spatially dispersed. Stakeholders noted that local housing problems primarily relate to insufficient availability rather than poor quality, while employment difficulties are more closely linked to low wages and seasonal jobs than to persistent unemployment. Many participants emphasised that long distances to workplaces, educational institutions, and essential services intensify the feeling of isolation. At the same time, strong traditions of self-reliance within rural communities often conceal the depth of social exclusion, as external support is either undervalued or perceived as unnecessary.

The findings underscore the need for rural development policies that take into account these specific circumstances. Stakeholders indicated that improving local well-being requires incorporating rural realities into regional policy frameworks, adopting indicators that adequately capture rural conditions, strengthening community capacity through targeted investments, and guaranteeing stable access to essential services.

Survey participants also acknowledged the importance of natural landscapes and cultural heritage for regional development. However, they stressed that their value depends on the ability to generate added value through effective resource management, institutional support, and adequate investment. According to respondents, tourism and recreation represent viable tools for sustainable rural development, capable of balancing economic growth with the preservation of natural and cultural assets.

Results demonstrate that rural communities recognise the need for more coordinated and strategic management of their resources. Many emphasised that a cluster-based approach could serve as an effective mechanism for organising tourism and recreation activities. Well-structured recreational clusters, as noted by respondents, would enable more efficient use of local assets, strengthen tourism's contribution to the regional economy, and enhance territorial competitiveness. Stakeholders also pointed to tourism's strong communicative and integrative capacity,

emphasising its potential to stimulate collaboration among small and medium-sized enterprises and to foster closer partnerships between businesses and local authorities – a trend consistent with observations by Burns and Holden (1995).

The survey also reveals that integrating tourism into broader rural development strategies is considered essential. While respondents recognised that tourism alone cannot eliminate social isolation, they noted that the arrival of visitors and external perspectives often reshapes social dynamics and revitalises rural communities, mirroring patterns described by Roberts and Hall (2001). They also emphasised that rural tourism should not be underestimated or treated as secondary; its economic, social, and cultural impacts should be fully integrated into planning and decision-making processes. With appropriate marketing, education, and interpretive programs, stakeholders believe it is possible to maintain a balance between tourist consumption and the preservation of rural authenticity.

Although concerns were expressed that sustainability principles may limit short-term economic gains, many respondents agreed that sustainable development provides the only viable foundation for long-term growth and community resilience. They emphasised that local interests often conflict with sustainability requirements, underscoring the need to consider tourism as part of integrated regional planning rather than isolated projects. Stakeholders supported the idea that tourism development must minimise negative impacts while respecting the physical, social, and cultural capacity of rural areas. This aligns with Butler and Hall's (1998) observation that evolving rural environments demand new frameworks for applying sustainability principles to ensure long-term economic viability.

Overall, the survey results indicate that stakeholders perceive tourism and recreation as crucial components of rural development, capable of strengthening local economies, fostering social cohesion, and promoting the long-term sustainability of rural communities.

The survey analysis highlighted the significant potential for developing partnership forms of work, while also revealing several barriers related to communication and the level of trust between stakeholders. To test these conclusions in practice and assess the participants' ability to interact effectively in real-world conditions, a hackathon was organised in the Cherkasy region. The use of this format not only deepened the understanding of cooperation mechanisms and the potential for forming tourism and recreational clusters but also enabled a comprehensive assessment of the region's resource base.

An objective analysis conducted during the hackathon allowed for the systematisation of Cherkasy's natural, cultural, and infrastructural potential, as well as identifying the roles of key participants in the tourism process and their level of readiness for partnership. Thus, the hackathon served as a practical continuation of the survey stage of the research, laying the groundwork for the development of realistic strategic goals and providing a starting point for further strategic planning in the region's tourism and recreation sector.

The Chyhyryn area, as part of the broader Cherkasy region, offers a remarkable combination of cultural and historical heritage, along with contemporary rural tourism experiences. Travellers can stay on local farms or in rural guesthouses, enjoy fresh, organic produce, and participate in various hands-on workshops. Among the most popular guesthouses are "Dykyi Khutir" (Wild Homestead), U Pani Oli (At Lady Oli's), Dvi sestry (Two

Sisters), Medova ferma (Honey Farm where guests sleep on beehives), Pershyy parkan (First Fence), Zernolend (Zernoland), U Hopaliv (At Hopala's), ta U Pani Tatyany (At Lady Tania's).

The success of the cluster model depends on the effective interaction of all stakeholders represented at the hackathon. Each of them plays a unique and indispensable role in the development of the tourism ecosystem.

Stakeholder Roles in Tourism Development

Table 3

Stakeholder	Key Role in Tourism Development	Examples of Initiatives (based on the source)
Local entrepreneurs	A driving force behind the creation of tourism products and infrastructure	Establishment of the first green homesteads ("Stezhky Tarasa" / "Taras Paths"). Development of thematic complexes ("Zernolend", "Babusyna khatka" / "Zernoland", "Grandmother's Hut"). Expansion of homestead networks in the Chyhyryn area ("Dyka sadyba" / "Wild Homestead")
Local communities	Initiators and generators of ideas; custodians of authenticity and cultural heritage	Development of "thematic villages" ("Krayina Mamontlandiya" / "Mammothland Country"). Intermunicipal cooperation (Buky and Kamianka communities). Creation of local routes ("Krayina Mamontlandiya" / "Path to the Pearl")
Public authorities	Creating enabling conditions, strategic planning, and infrastructure support	Inclusion of tourism in the regional development strategy. Development of the mobile app "Travel Cherkasy Region". Financial support through regional programs
Educational institutions	Ensuring the professionalisation of the tourism sector through training and expert support	Training specialists at higher education institutions. Implementation of educational projects ("Rural Development Academy"). Organisation of seminars for all who are concerned

Source: author's own elaboration

Based on the conducted analysis and the results of expert discussions between representatives of local entrepreneurs, local communities, public authorities, and educational institutions during the hackathon, it is possible to identify the key challenges hindering development and the strategic opportunities that need to be utilised:

**Key Challenges:**

- Insufficient development of infrastructure (quality of roads, lack of public toilets, inadequate route signage).
- Lack of specialised knowledge and skills among entrepreneurs in management, marketing, and securing funding.
- Limited access to financial resources, including favourable loans and grant programmes for small businesses.
- Low level of coordination and communication among interested parties, leading to dispersed efforts.
- **Strategic Opportunities:**
- Rapid growth in demand for domestic and green tourism, driven by changing consumer preferences.
- Opportunity to utilise successful international experience (notably Estonian) to build an effective cluster model.
- Significant potential for developing rehabilitation tourism in the post-war period to aid the recovery of military and civilian populations.
- Presence of active local leaders and successful pilot projects that can be scaled across the entire region.

The conducted hackathon convincingly demonstrated that the further development of rural tourism in the Cherkasy region is impossible without transitioning from isolated initiatives to a systematic and coordinated approach. Participants reached a consensus that the foundation for future actions should be a unified vision, mission, and strategic direction, which will serve as a standard 'compass' and bring all stakeholders together around a shared future. During discussions, a common aspiration was articulated – to transform the Cherkasy region into a recognisable, competitive, and sustainable rural tourism destination that attracts Ukrainian and international tourists, based on its unique cultural heritage, partnerships, and local identity. Participants emphasised that realising this vision requires the pooling of resources and efforts from businesses, communities, government bodies, and scientific institutions,

which together can create and promote a comprehensive, authentic tourism product capable of ensuring economic growth in rural areas and improving the well-being of residents.

The results of the hackathon outlined clear priorities for future development. Emphasis was placed on strengthening the tourist flow by focusing on improving the quality and diversity of offerings, as well as creating a cohesive regional brand that effectively represents the cultural, historical, and natural heritage of the Cherkasy region across various markets. It was highlighted that tourism should become a key economic driver, increase community incomes, and create new jobs, thereby contributing to reduced migration and a strengthened local economy.

Participants agreed that to achieve these results, it is necessary to implement a comprehensive organisational model built on a cluster approach. A vision of the cluster as a holistic system was formed, where the rural economy provides the foundation for gastronomic and agro-tourism products, enterprises in the tourism sector form the direct offer, the organisational and managerial centre is responsible for strategic coordination, and the advisory-communication segment ensures effective exchange of information, knowledge, and resources. Participants emphasised that the lack of coordination and specialised knowledge today is one of the key barriers, which is why the creation of a network of public advisory centres became one of the most supported solutions. These centres were considered as permanent hubs of professional support, training, networking, and project coordination, as well as a tool for the systematic promotion of the region.

Discussions at the hackathon also highlighted the need to shift from isolated tourist attractions to comprehensive integrated products that would encourage tourists to stay longer in the region. It was proposed to develop thematic routes, connect local initiatives into joint networks, scale up the concepts of thematic villages, and create specialised tours aimed, in particular, at psychological and physical rehabilitation for different groups of the population.

Participants of the hackathon actively referred to international practices, noting that the experience of Estonian organisations and European approaches to

certifying rural homesteads, presented by an Estonian colleague during the event, can significantly enhance the region's competitiveness. Considerable attention was given to opportunities for attracting international grants, educational programmes, and partnership exchanges that can accelerate the implementation of best practices. Holding such an event indicates that Ukraine is already actively adopting Estonia's experience in the field of clustering to improve the competitiveness and sustainability of rural tourism. The collaboration between the NGO 'Union for the Development of Rural Green Tourism of Ukraine' and Tallinn University, along with the Estonian Centre for International Development, has become a key channel for knowledge

transfer, enabling the adaptation of successful approaches to the Ukrainian context. Adapting the Estonian model to Ukrainian realities presents opportunities for implementing innovative tools that focus on sustainable development, network interaction, and promoting local brands. The Estonian experience demonstrates that uniting dispersed rural homesteads into cluster networks, with joint product promotion, knowledge exchange, and the implementation of quality standards, can be a key to the sustainable development of rural areas. To outline the potential of such an adaptation, Table 4 presents the main standard features and differences between the Ukrainian and Estonian clustering models.

Table 4

Main standard features and differences between the Ukrainian and Estonian clustering models

Criterion	Estonia	Ukraine (Cherkasy region and overall)
Organizational level	Existence of a unified national cluster structure (ERTO) since 2000, coordinating marketing and development	Clusters are formed locally; large cluster alliances exist (e.g., the Ukrainian Cluster Alliance and the Union of Rural Green Tourism of Ukraine), but coordination at the grassroots level is insufficient
Involvement of education and authorities	Active and institutionalised four-party partnership (business–government–community–education)	Aspiration for a four-party partnership. Educators are involved in training and capacity building, but external support is often needed to establish effective communication
Focus on quality and standards	Own quality systems implemented, e.g., EHE ecological certification	High-quality, sustainable, and ecologically tourism products are key factors of competitiveness, but centralised standardisation systems require development
Cluster development stage	Mature cluster model with emphasis on network-based organisation and sustainability	Emerging stage with search for effective models, transition from isolated initiatives to a more structured sector
Mechanism for cooperation support	European programs (LEADER) and strong internal trust among participants	Introduction of a network of public tourism consultation centres as a tool for forming network links and addressing communication challenges

Source: author's own elaboration

### Discussion and conclusions

The integration of the cluster approach into rural area development strategies has confirmed its effectiveness as a tool for the interconnected development of the economic, social, and environmental dimensions of well-being. The tourism cluster operates as a form of territorial and sectoral cooperation, bringing together representatives of authorities, businesses, educational and scientific institutions, and local communities to achieve common goals of sustainable development.

The survey conducted as part of the research involved over 250 stakeholders in rural tourism across various regions of Ukraine. It provided an empirical basis for assessing the state of communication, participants' needs and motivations, as well as the level of interest in developing cluster cooperation. The results confirmed the presence of a high potential for strengthening network interaction, a desire to improve the quality of tourism services through standardisation and training, and a need for additional financial resources, marketing support, and educational initiatives.

The experience of the hackathon confirmed that establishing effective communication between key stakeholders – entrepreneurs, communities, government authorities, and educational institutions – is a primary step towards organising cluster cooperation. Even short-term joint initiatives contribute to the development of partnership relations, trust, and mutual understanding, laying the groundwork for creating networks necessary for diversifying the rural economy.

At the same time, the research revealed systemic challenges that limit the development of rural areas: insufficient funding, a shortage of qualified personnel, a lack

of strategic planning, and a low level of innovative and educational potential. Participants of the hackathon emphasised the need to improve access to financial resources, develop business planning, and enhance managerial competencies.

Based on the obtained results, key directions for further discussions and strategic planning have been formulated, including the institutionalisation of the partnership through a network of advisory centres, the development of comprehensive tourism products, the implementation of standards and certification systems, and the active utilisation of international experience and grant programmes.

The overall conclusion is that the transformation of rural tourism in the Cherkasy region is only possible through stable cooperation among all participants and a willingness to share responsibility for the outcome. The cluster approach, supported by professional assistance, integrated tourism products, and international experience, is identified as the most effective mechanism for development. The successful implementation of this approach depends on the level of engagement of each stakeholder – from estate owners to regional managers – and their readiness to act in partnership and based on mutual trust.

Therefore, the clustering of rural areas can become a strategic tool for national and regional welfare policies, creating conditions for economic diversification, increased employment, the preservation of cultural heritage, and the strengthening of social cohesion within communities. Implementing these approaches allows the Cherkasy region to realise its potential and transform into a sustainable, competitive, and authentic tourist destination.

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## СТРАТЕГІЧНИЙ ПЛАН РОЗВИТКУ СІЛЬСЬКОГО ТУРИЗМУ НА ОСНОВІ КЛАСТЕРНОЇ МОДЕЛІ (ПРИКЛАД ЧЕРКАСЬКОЇ ОБЛАСТІ)

**Вступ.** Сучасний розвиток сільських територій в Україні вимагає інноваційних рішень, оскільки громади стикаються з демографічним спадом та економічним тиском. Впровадження туристичних кластерів стало перспективним механізмом підвищення локальної стійкості та зміцнення співпраці між ключовими зацікавленими сторонами. Спільні українсько-єстонські ініціативи, реалізовані з 2021 по 2024 рік, свідчать про позитивний вплив обміну досвідом, хакатонів та мережевих заходів на формування стратегій розвитку туризму на основі громади. Ці проекти підкреслюють зростаюче значення туризму у диверсифікації сільських економік та створенні професійного середовища для сталого регіонального розвитку.

**Методи.** Методологія дослідження поєднувала соціальні та економіко-організаційні підходи, що дало змогу всебічно оцінити процеси комунікації та потенціал партнерської взаємодії в сільських громадах. Основні дані було зібрано шляхом опитувань (понад 250 інтерв'ю), а також під час хакатону, що дає змогу перевірити гіпотези, оцінити рівень співпраці між зацікавленими сторонами та визначити можливості для формування туристичних кластерів.

**Результати.** У статті обговорено сучасні трансформації сільських територій у контексті переходу від продуктивної до постпродуктивної моделі розвитку, а також роль туризму в цих процесах. Висвітлено ключові характеристики сільських районів та проаналізовано спектр туристичних і рекреаційних заходів, що сприяють привабливості сільських просторів. Показано, що розвиток сільського туризму сприяє економічній диверсифікації, збереженню культурної спадщини, зміцненню соціальної згуртованості та поліпшенню якості життя. Водночас окреслено обмеження сектору, зокрема його фрагментацію, брак компетенцій та обмежені фінансові ресурси. За результатами опитувань зацікавлених сторін та практичного хакатону в Черкаській області визначено ключові виклики та стратегічні можливості розвитку сільського туризму. Продемонстровано ефективність кластерного підходу для об'єднання бізнесів, громад, органів влади та освітніх закладів для створення конкурентного туристичного продукту. Підкреслено важливість міжнародного досвіду, зокрема естонського, для підвищення інституційної спроможності та сталості регіональних туристичних кластерів. Запропоновано стратегічні орієнтири для розвитку сільського туризму як інструменту сталого територіального розвитку в Україні.

**Висновки.** Трансформація сільського туризму можлива лише за умови стабільної співпраці всіх учасників, основаної на взаємній довірі. Кластерний підхід виступає як ключовий механізм розвитку, здатний забезпечити економічну диверсифікацію, збереження культурної спадщини, зміцнення соціальної згуртованості та створення конкурентного і сталого туристичного регіону.

**Ключові слова:** сільський туризм, кластерний підхід, туристичні кластери, розвиток сільських територій, економічна диверсифікація, Черкаська область.

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