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# A Qualitative Study on Cluster Potential and Strategy Development in Marine Tourism Sector: A Stakeholder-Centric Approach

Gökçe Tuğdemir Kök<sup>1\*</sup>, Serim Paker<sup>2</sup>

<sup>1</sup> Mersin University, Maritime Faculty, Maritime Business Administration Department, Mersin University Maritime Faculty Tece Campus Mezitli/Mersin, Türkiye, e-mail: gokcetugdemir@mersin.edu.tr; ORCID ID 0000-0002-9642-3985

<sup>2</sup> Dokuz Eylül University, Maritime Faculty, Maritime Business Administration Department, Adatepe District Doğu Street No:207/İ 35390 Tınaztepe Campus Buca – İzmir, Türkiye, e-mail: serim.paker@deu.edu.tr; ORCID ID 0000-0002-8931-9039

\* Corresponding author

## ABSTRACT

With regard to the case study of the Kuşadası Region in Türkiye, the aim is to evaluate the feasibility of a potential clustering approach for the marine tourism sector, propose strategies for the potential cluster, and determine its applicability from the stakeholders' perspective. The study is grounded in Porter's Cluster Theory and utilizes qualitative research methodologies.

Semi-structured interviews with Kuşadası Marine Tourism stakeholders are analyzed based on Porter's diamond model. The marine tourism sector in Kuşadası has the potential to compete thanks to its favorable climate, rich historical, religious, and cultural heritage, strategic geographic location, easy transportation, established global reputation, highly skilled workforce, reputable information institutions, influential local government, and possession of all key marine tourism components.

Therefore, it is imperative to establish achievable targets to foster the sector's growth and development. Strategies are under development being developed for the Prospective Cluster and their feasibility is being assessed through the Delphi Method.

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## 1 Introduction

Clustering refers to concentration of interdependent actors, such as businesses, institutions, and supporting organizations, who operate within the same industry, participate in the same value chain, and collaborate and compete with one another, while also having business ties.

Clustering theory was first introduced in Porter's 1990 study "The Competitive Advantage of Nations," which was inspired by national competitiveness studies conducted in several industrialized countries [22]. The clustering strategy facilitates creation of regionally competitive structures for businesses of all sizes and integrates contemporary concepts. Clusters culminate in the collaboration of individuals from diverse societal domains such as local governments, public authorities, private institutions, research institutions, and non-governmental organizations. As such, local contributors are involved in the planning and execution of the strategy, relinquishing centralization. This process seeks to identify highly competitive sectors, complete any neces-

sary actors, facilitate communication among them, and ultimately enhance global competitiveness of the sector [10].

In the present world of intensifying global competition, clusters are a noteworthy aspect of the competition. Numerous company owners and employees now prefer clusters because of the cooperation and adaptability of local small-scale producers. The clustering approach is recognized as a regional and national development model that enhances sectoral, local, and regional competitiveness, and has acquired greater significance in recent years. Developing nations have also begun to adopt this widely popular strategy which is particularly prevalent in developed nations [6].

Coastal regions have traditionally been viewed as the most sought-after areas for economic and cultural advancement, and play a key role in the progress of societies and nations alike. Marine tourism encompasses the process of people leaving → whereby individuals depart from their homes for sea-oriented regions and spending their free time there while taking part in activities that are related to the sea → residences to travel to areas connected

to the sea, where they spend their leisure time engaging in sea-related activities [8]. This form of tourism includes occupational activities associated with tourism as well as other professional activities that directly support it [7].

## 2 Literature Review on Marine Tourism Clusters

When reviewing the marine tourism cluster literature, some articles and publications directly focus on the

- Clustering of the marine tourism sector (Table 1) [19]; [29]; [12]; [21]; [27]; [3]; [2]; [17]; [30] and [31].
- While others focus on the clustering of sub-branches of marine tourism (Table 2) [16]; [26]; [24] and [20].
- Furthermore, marine tourism is explored as a sub-sector of the maritime cluster in research focusing on the maritime cluster (Table 3) [32]; [28]; [25]; [18].

**Table 1** Literature Review on Marine Tourism Cluster related to Marine Tourism Sector

Author/Year	Aim of the Study	Sample of the Study	Methodology
Pardali et al., 2007	Examining Greek marine tourism through the application of sustainability principles in a cluster-based development approach.	Greece	Secondary
Yhang et al., 2007	Testing the relationship between stakeholders for the Busan marine tourism cluster.	Busan marine tourism cluster / South Korea	Focus Group
Gonçalves et al., 2011	Describing the key characteristics in the vision of pertinent stakeholders for the creation of an Atlantic Regional Sea Cluster.	Algarve Sea Cluster / Portuguese	Semi-structured interview
Pinto and Cruz, 2012	Investigating the potential of the maritime cluster to emerge as a significant stimulant of the economy in the Algarve, which is renowned for its tourism sector.	Algarve Region / Portuguese	Interview- Network Analysis
Silvanskaya and Shibaev, 2013	Examining the growth of marine tourism in Odessa, and the conceptual scheme of the cluster.	Odessa region / Ukrain	SWOT analysis
Artun, 2016	Analyzing the marine tourism cluster in Fethiye at the local level.	Fethiye / Türkiye	Questionnaire
Arsezen and Yüzsever, 2017	Exposing the current analysis of the Marine Tourism cluster in Türkiye.	Türkiye	Pilot Study
Luo, 2019	Assessing the growth of traditional industrial clusters in China.	China	Diamond Model
Yustika and Goni, 2020	Defining the stakeholders and relationship models of coastal marine tourism.	Thousand Islands / Canada	Network Structure
Yüzbaşıoğlu and Doğan, 2021	Determining the level of strategic governance practices in marinas in the Muğla marine tourism cluster.	Muğla / Türkiye	Interview – Content Analysis

Source: Prepared by author

**Table 2** Literature Review on Marine Tourism Cluster related to sub-branches of marine tourism sector

Author/Year	Aim of the Study	Sample of the Study	Methodology
Lazzeretti and Capone, 2010	To identify the significant leisure and sports boatbuilding clusters that are major players in this industry in Tuscany, Italy, and to suggest policies and strategies to assist policymakers and economic actors.	Boatbuilding Clusters in Tuscany, Italy	The Local Labor System
Sarvan et al., 2010	To explain the growth of the yacht production cluster in the Antalya Free Zone.	Yacht production cluster in the Antalya Free Zone / Türkiye	Interview – Diamond Model
Quildon and Pun, 2011	To discuss the main variables affecting the value generation of the Yachting services cluster in Trinidad and Tobago and investigate the current situation.	Yachting services cluster in Trinidad and Tobago, Caribbean	Questionnaire

Source: Prepared by author

**Table 3** Literature Review on Marine Tourism as a sub-sector of the maritime cluster

Author/Year	Aim of the Study	Sample of the Study	Methodology
Salvador et al., 2016	To analyze the emerging maritime cluster in Portugal and the best mix of strategies and policies to make it successful.	Maritime cluster in Portugal	input-output (I-O) analysis, surveys, and Delphi panels
Marlyana et al., 2017	To evaluate the major traits and potential aspects of Indonesia's competitive maritime cluster.	Maritime Cluster in Indonesia	Literature Review, Benchmark analysis, Diamond model

Source: Prepared by author

The “Findings and Discussion” section analyses the similarities and differences between this study's findings and previous works in the literature.

The relevant literature provides scant information on the marine tourism clustering phenomenon at the national and international levels. Moreover, there is no comprehensive research that encompasses all stakeholders' viewpoints. This study seeks to address an existing gap in the current literature by conducting a competitive analysis, implementing a clustering approach, and devising a strategic proposal for the marine tourism sector.

### 3 Methodology

The objective of this investigation is to assess a promising clustering technique for the marine tourism sector, a crucial element of both tourism and shipping, within the context of the Kuşadası area. Additionally, we seek to recommend a strategy for the possible creation of a marine tourism cluster, and to determine its feasibility from the standpoint of stakeholders. The Kuşadası region in Aydın province, Türkiye, boasts an international cruise terminal, a marina with ample yacht mooring capacities, 32 surface and

**Table 4** Sample of the Study

Position of Attendee	Business Line	Educational Background	Exp. in Sector
<b>Service Providers</b>			
<b>Main Service Providers</b>			
Port manager	Cruise port	Undergraduate	27
Marina manager	Marina	Postgraduate	32
Instructor	Water Sports Center	Undergraduate	15
Entrepreneur	Water Sports Center	High-School	10
Entrepreneur	Daily Excursion Tours	High-School	42
Entrepreneur	Daily Excursion Tours	High-School	29
<b>Secondary Service Providers</b>			
Operation Executive	Cruise Agency	High-School	24
Accounting Executive	Cruise Agency	High-School	34
Manager	Cruise Agency	Undergraduate	30
Entrepreneur	Yacht Agency	High-School	20
Entrepreneur	Yacht Agency	Primary School	44
Operation Executive	Yacht Agency	Undergraduate	11
Manager	Yacht Management Company	High-School	14
Entrepreneur	Yacht Sales Company	Undergraduate	10
Entrepreneur	Yacht Maintenance and Repair Enterprise	Associate degree	6
Production Engineer	Yacht Manufacturing Enterprise	Undergraduate	2
Sales Assistant	Transportation Enterprise	Undergraduate	7
Entrepreneur	Transportation Enterprise	High-School	4
Accounting Manager	Carpet Shop	High-School	13
Entrepreneur	Souvenir Shop	Undergraduate	
Chef	Restaurant	High-School	32
<b>Central and Local Government)</b>			
Chairman of Marine Department	Metropolitan Municipality	Undergraduate	22
Tourism Researcher	Ministry	Undergraduate	9
Coast Guard Commander	Ministry	Postgraduate	16
Port Chairman	Ministry	Doctorate	13
Expert	Development Agency	Doctorate	10
<b>Non-Governmental Organizations</b>			
Chairman of Cooperative	Daily Excursion Tours Cooperative	High-School	29
Secretary-general	Chamber	Postgraduate	10
Kuşadası Executive	Chamber	High-School	15
Chairman of Association	Water Sports Association	High-School	10
<b>Knowledge Producing Institutions</b>			
Deputy Dean	University	Doctorate	15
Associate Professor	University	Doctorate	-

Source: Prepared by author

underwater water sports areas, recreational fishing opportunities, yacht manufacturing enterprises, food and beverage establishments, travel agencies and tour operators, entertainment businesses, transportation services, and small industrial sites. These marine tourism components are conveniently located in the same geographic area. It can be asserted that the area exhibits a sizeable economic cluster with regard to marine tourism. Accordingly, the research sample area selected is Kuşadası region. Main Research Questions of this study are “Is there a potential cluster in the Kuşadası Marine tourism sector?” and “Which strategies can be developed for the future of the potential Kuşadası Marine Tourism Cluster?”. To answer this question, an exploratory approach has been used with qualitative methods.

### 3.1 Semi-Structured Interview for Porter’s Diamond Model

Porter’s diamond model identifies the fundamental factors that contribute to the development of a cluster. A high level of local competition between firms, favorable input conditions, the presence of skilled demand and related and complementary sectors all contribute to the development of the cluster. Porter’s (1990:1998) Diamond Model and literature were used to develop the interview questions [22], [23].

#### 3.1.1 Sampling and Data Collection Process

All stakeholders involved in the Marine Tourism Sector in the Kuşadası region—which is being studied as a case study—are included in the research population. The sample for the semi-structured interview has been determined using the purposive sampling method. Data collection should be continued until the stage (saturation point)

when the concepts and processes that can answer the research question begin to be repeated [11], [13].

The research sample is composed of experts from marine tourism stakeholders in the region. Between 15 December 2021 and 20 January 2022, face-to-face interviews will be conducted with 32 stakeholders from different marine tourism sectors (Table 4).

#### 3.1.2 Findings and Discussion

To identify clustering, the level of competitiveness of the region was determined using Porter’s Diamond model with content analysis to identify clustering. The expert responses were coded using MAXQDA 2022 software. The hierarchical code and sub-code model of MAXMaps, one of the visual tools of MAXQDA 2022, was used for coding and frequently repeated codes were identified from the coded sections.

#### Diamond Model

Porter (1990) presents clustering using the “competitive diamond model” [22]. The vertical and horizontal relationships between the actors, their geographical proximity, and their cooperation are the determining factors in Porter’s concept of clustering [4].

The Porter’s Diamond model and the literature were used to guide the 30 questions that have been posed to the experts under seven headings. The Diamond model has been coded in the MAXQDA program using 27 sub-codes and six different themes. Figure 1 shows the code and sub-codes created for the diamond model. The most frequently mentioned subjects are firm strategy, structure, and competition. The second most frequently discussed topic is the impact of the government and its affiliated and supporting businesses.

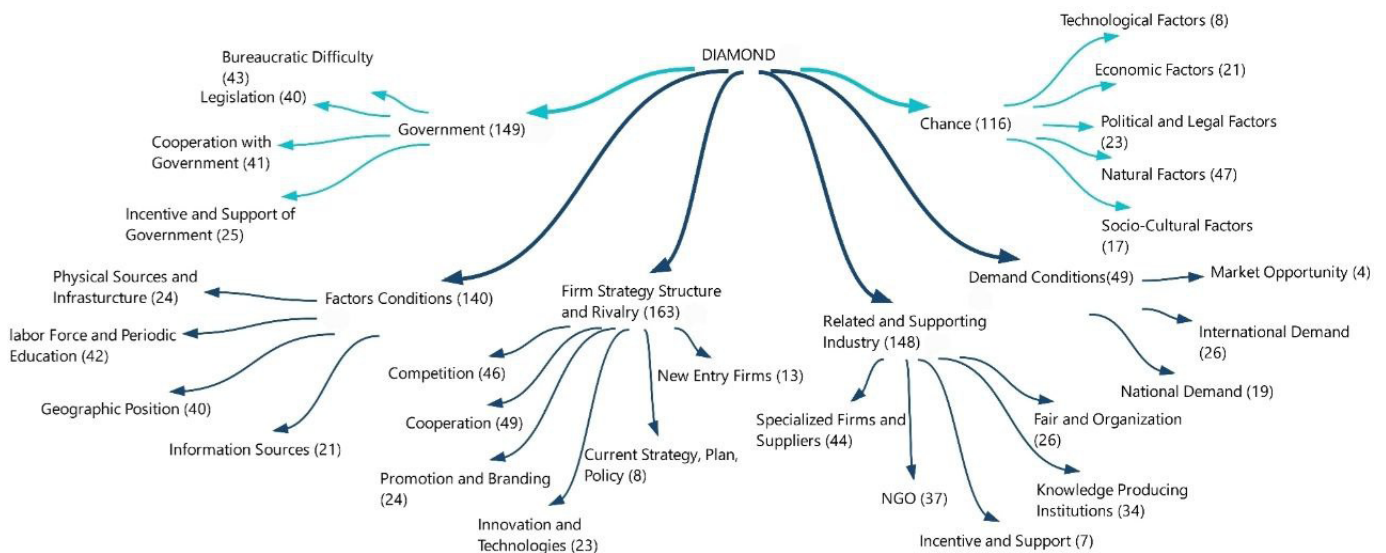


Figure 1 Code and Sub-codes created for the Diamond Model



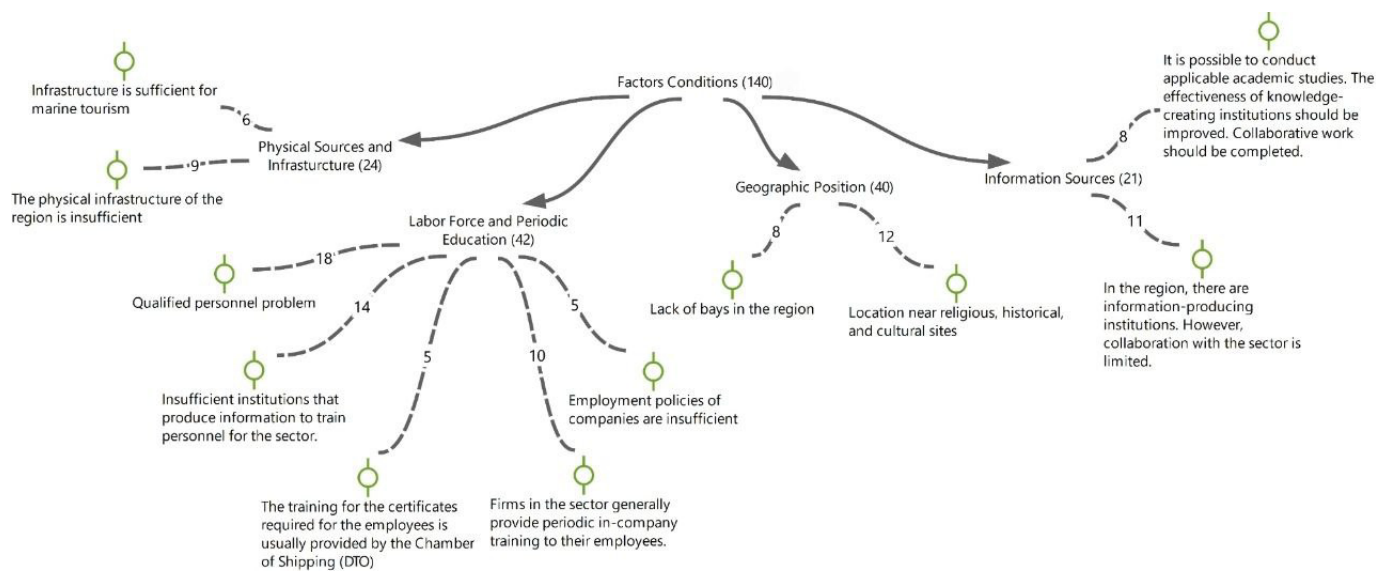


Figure 2 Sub-codes of “Factor Conditions”

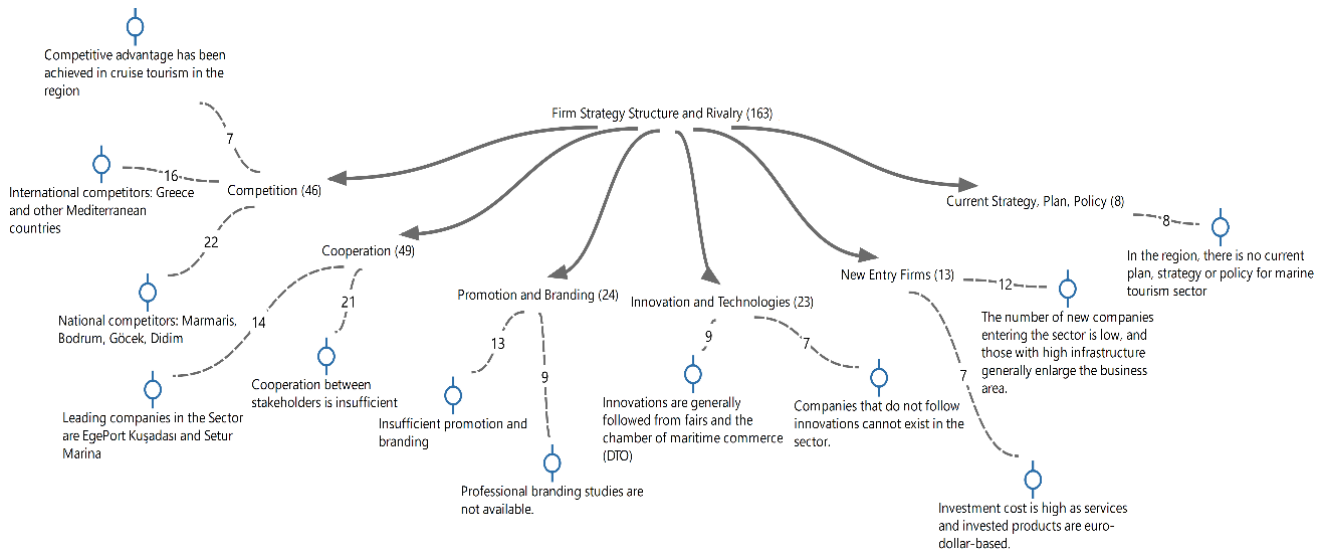
Source: Prepared by Author

**Factor Conditions:** Traditional economic theory holds that the structure of a country's production and trade is determined by factors such as labor, land, natural resources, capital, and infrastructure. Five questions have been asked about “factors conditions,” one of the diamond model's main factors. The responses were coded into four distinct themes. Figure 2 depicts physical sources and infrastructure, labor force and their periodic education, geographical location, and information sources.

Although the physical infrastructure of the region is suitable for the marine tourism sector, it is inadequate at a regional level. Due to the increasing population, infrastructure problems occur during the summer. The physical infrastructure needs to be improved. Kuşadası, as a tourist destination close to historical, cultural and religious areas, attracts a large number of visitors and contributes to the growth of the area. Sources of information or organizations that produce information include high schools and universities in the region, but there is little interaction between academia and the sector, similar to the study of Pardali and Giansti (2018) [20]. In the sector, statistical data are not shared, similar to the study of Artun (2016) [3]. In this context, activities should be planned to improve cooperation between universities and the sector. Geographically, the region is close to tourist attractions, airports, historical sites and places of worship. The area needs to adapt to the principles of sustainability due to its wealth of natural resources and beauty, cultural and historical heritage and, most importantly, a distinctive marine environment, similar to the study by Pardali (2007) [19]. There are problems with the skills of the region's workforce. Businesses don't currently have an employment policy. It is crucial to support educational institutions in order to provide language training and qualified personnel.

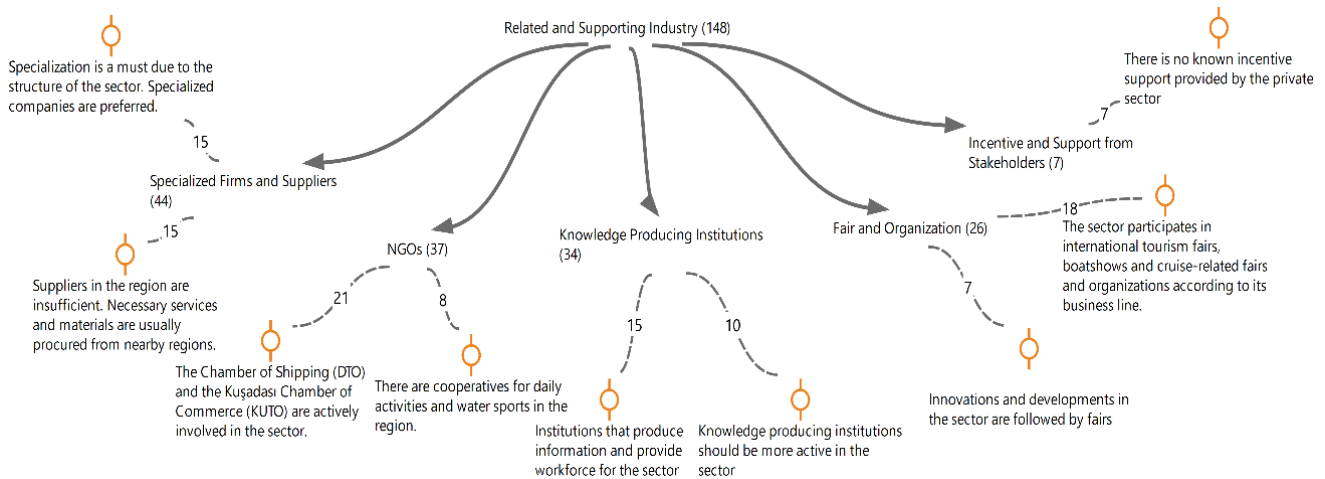
**Firm Strategy, Structure and Rivalry:** The nature of local competitive conditions is another determinant in the Diamond Model, in addition to the environment in which the firm emerges, organises and manages as a power [15]. Six questions were asked about "firm strategy, structure and rivalry", one of the main factors in the Diamond Model. The answers were coded into six different themes. These are competition, cooperation, advertising and branding, innovation and technology, new entrants and current strategy, plan, policy. The most frequently repeated and significant responses from the sub-coded data are shown in Figure 3.

The region has a competitive advantage in the cruise tourism sector. With a number of neighboring destinations that cater to different business lines of marine tourism, Kuşadası can use its cost advantage strategy to compete effectively. The cooperation among the stakeholders in the sector is insufficient, similar to the studies of Sarvan et al. (2010), Artun (2016), Salvador et al. (2016), Doğan (2019) [3], [9], [25], [26]. Activities that increase cooperation and bring stakeholders together should be organized. The leading companies in the sector are Kuşadası Cruise Port and Kuşadası Marina. Kuşadası region is presented as the "Disneyland of History". However, the promotion and branding activities in the region are insufficient. Innovations are not pursued. Innovation and R&D activities are insufficient, similar to the study of Gonçalves et al. (2011) [12]. The sector seems to have become a static market instead of benefiting from developments. Instead of benefiting from progress, the market in this area seems to have stagnated [19]. The few new companies entering the market are a result of the high investment costs. In order to contribute to regional development, the marine tourism sector in Kuşadası needs to address its shortcomings. All



**Figure 3** Sub-codes of “Firm Strategy, Structure and Rivalry”

Source: Prepared by Author



**Figure 4** Sub-codes of “Related and Supporting Industry”

Source: Prepared by Author

participants jointly stated that the sector has no plan, strategy or policy and emphasized that it should be similar to Artun's (2016) study [3]. Marine tourism stakeholders are ready to create plans and contribute to the growth of the sector. Problems can be solved, competitive advantage can be gained through cooperation, and successful clustering for the sector can be realized with the plans, strategies and policies that will be developed.

**Related and Supporting Industry:** The most important variable in a competitive industry is the related and supporting industries. The existence of such institutions and the activities they carry out have a significant impact on the competitiveness of sectors and thus on the ability to export [5]. Six questions were asked about 'related and sup-

porting industries', one of the main factors in the diamond model. The responses were coded into five different themes. These are specialized firms and suppliers, NGOs, knowledge producing institutions, incentives and support from stakeholders, and fairness and organization. The information sources section of the conditions factor contains detailed information on knowledge producing institutions. The most frequently repeated and significant responses from the sub-coded items are shown in Figure 4.

Kuşadası marine tourism sector has companies that are specialised in the region. These are global cruise ports, corporate marinas, international yacht and cruise agencies, experienced water sports and daily boat operators, etc. However, there aren't enough local suppliers. Techni-

cal staff have the necessary training and expertise. In contrast to Arsezen and Yüzsever (2017) [2], NGOs are actively participating and collaborating with the sector. Several NGOs are emerging as leaders in the sector, similar to the study by Artun (2016) [3]. The Chamber of Shipping is the most active NGO in the field, similar to Arsezen and Yüzsever's (2017) study [2]. It acts as a bridge between service providers and government organizations. The region does not receive enough incentives and support. Scientific studies should be increased and necessary opportunities should be created for holding symposiums, workshops, congresses and seminars on marine tourism. Participate in national and international fairs related to the sector.

**Demand Conditions:** Porter also emphasized the demand conditions factor, starting with the importance of strong and conscious local demand for the company's product or service in the competitive advantages of nations. Two questions were asked about 'demand conditions', one of the main factors in the diamond model. The

responses were coded into three distinct themes. These are domestic demand, international demand and market opportunity. The most frequently repeated and significant responses from the sub-codes are shown in Figure 5.

There is not enough demand for the sector on a global scale. Promotional and branding initiatives need to be intensified to increase demand. In addition, the country's environment should be made trustworthy. Visitors to the region priorities price policy over quality of service. This affects a certain group of inbound tourists. By providing a quality service based on customer satisfaction, the economic contribution should be increased. Local tourists prefer the area to tourists from other countries.

**Government:** Four questions were asked about 'government', one of the indirect factors in the Diamond Model. The responses were coded into four different themes. These are bureaucratic difficulties, legislation, government incentives and support, and cooperation with government. The most frequently repeated and significant responses from the sub-coded questions are shown in Figure 6.

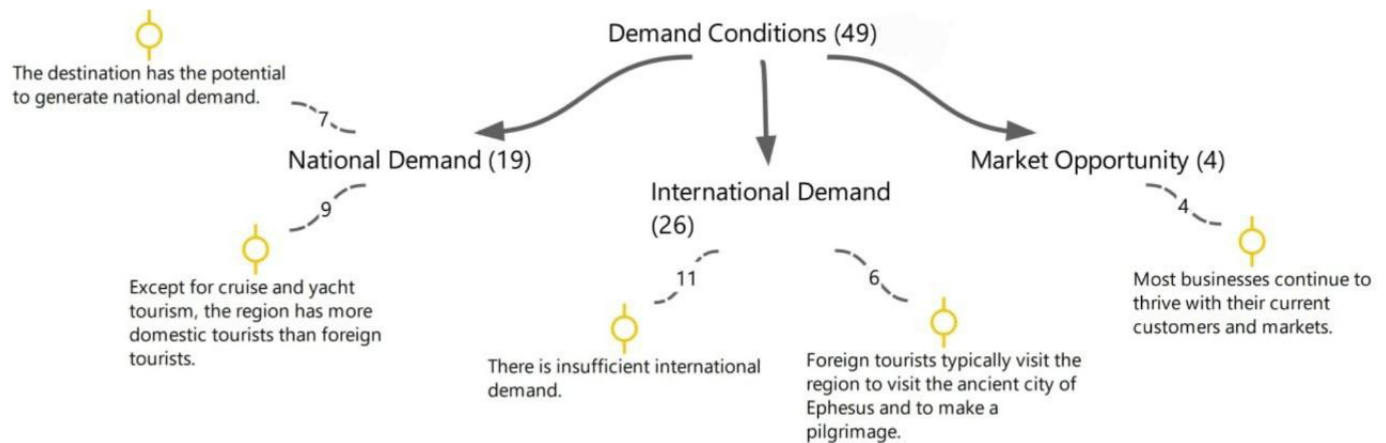


Figure 5 Sub-codes of "Demand Conditions"

Source: Prepared by Author

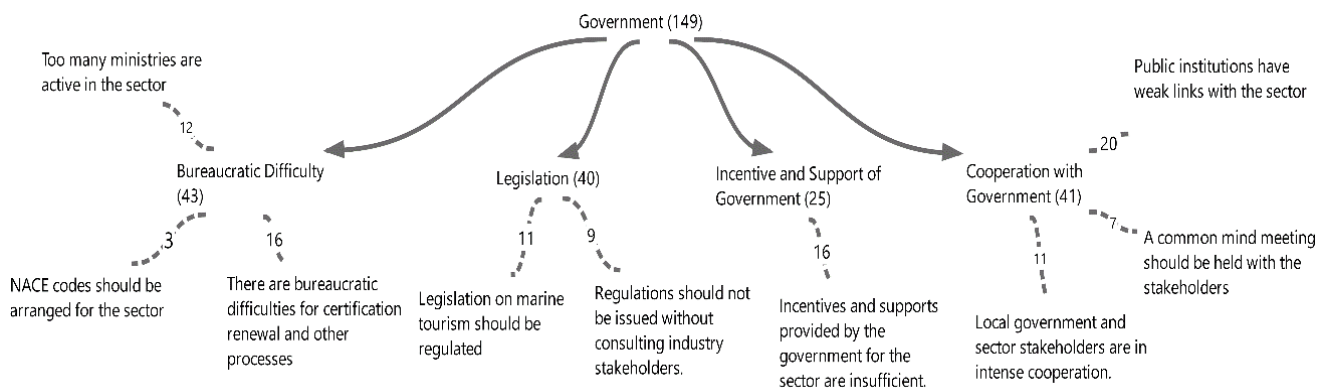


Figure 6 Sub-codes of "Government"

Source: Prepared by Author

The marine tourism sector is actively supported by numerous ministries, similar to the study by Yüzbaşıoğlu and Doğan (2021) [31]. This leads to bureaucratic difficulties. The sector is mainly dominated by public institutions in terms of legal and administrative procedures. Institutions need to improve their sector-wide effectiveness and take measures to address the problems faced by businesses and institutions [14]. The cooperation of local governments with the sector is not similar to the study by Yhang (2007) [29]. Local governments do not have legislative authority over the marine tourism sector [2].

Some enterprises in the sector are not able to benefit from incentive and support mechanisms due to the NACE code definition. Contrary to the study by Yüzbaşıoğlu and Doğan, (2021) [31], the opinions of stakeholders are not sought when it comes to laws and regulations. Sector-specific laws and regulations should be drafted with the input of sector stakeholders. The marine tourism sector does not receive sufficient support or incentives from the government. Government initiatives to develop the marine tourism cluster can strengthen links between related and supporting industries, increasing economic efficiency and general well-being, while reducing the likelihood of opportunistic behaviour and increasing the ability of businesses to adapt to changing conditions [29]. Reducing red tape and modernising the institutional framework are the first steps that will help increase the competitiveness of marine tourism [20].

**Chance:** The marine tourism sector in the region has been evaluated in terms of economic factors such as economic crises, exchange rate, embargo, inflation, high loan rates and oil price. The sector in Kuşadası has been evaluated in terms of natural factors such as transport accessibility, location in relation to natural disasters, climate, pollution and energy availability. The sector has been assessed in terms of political and legal factors, including taxes, international relations, political developments, conflict and war environment, and legal regulations. The sector has been assessed in terms of socio-cultural and demographic elements, such as population distribution, employee/population ratio, and traditions and customs. The sector was assessed in terms of technological aspects, including innovation, technological change and research and development expenditure.

### 3.2 Delphi Method

In the last stage of the study, the responses received from the experts were analyzed and strategies for a potential cluster were proposed. The applicability of the strategies was analyzed with the stakeholder perspective using the Delphi method especially for the marine tourism sector in Kuşadası. The experts in the semi-structured interview "Kuşadası Potential Marine Tourism Cluster Approach and Diamond Model" were subjected to the Delphi technique. 23 experts responded to the first round of the Delphi form. The reason why the experts

who participated in the semi-structured interview also participated in the Delphi research is that the strategies will be created with the data obtained from the experts. The semi-structured interview phase was also a preliminary research for the Delphi method. It was decided to carry out a two-stage Delphi study because it was thought that a longer Delphi process might reduce the interest and participation of panel members in the study. The Delphi study will cover the period between 22 June 2022 and 15 December 2022.

In the Delphi study, the consensus ratio was determined using the central tendency, the central distribution and the consensus level. The consensus level of the strategies in this study was set at a minimum of 70%, the arithmetic mean at a minimum of 4, the median at a minimum of 4, the interquartile range at a maximum of 1, and the standard deviation at a maximum of 2.

#### 3.2.1 Results of First-Round Delphi Study

In the first round of the research, strategies for the potential Kuşadası Marine Tourism Cluster were developed with the main problems and themes identified in the previous interviews, and the applicability of these strategies in the sector was asked to the experts using a 5-point Likert scale.

The first round of the Delphi online likert-type questionnaire, which included 24 strategies and five main topics, has been created and distributed to 28 experts. Eight cluster formation and collaboration strategies, four bureaucracy related strategies, five promotions, marketing, and innovation strategies, four education and employment strategies, and three environmental strategies have been developed. The first round was ended and the data were collected after a waiting period of roughly 100 days. 23 experts returned in the initial round. About 82% of the study's participants returned it.

After the necessary changes have been made on strategies coded C4, C5, B2, B3, B4, P5, EE1, EE3 and E1, it is presented to the experts for evaluation in the second session (Table 5).

#### 3.2.2 Results of Second-Round Delphi Study

The second round of the research consists of the nine strategies that could not be agreed upon by analyzing the opinions of the experts in the first round (Table 6). A 75-day process was followed for the second round, which was created by sending the Likert-type scale to the expert's online. In the second round, the values of these strategies have been tabulated together in order to see the status of the strategies that did not reach a consensus in the previous round, and the experts have been asked to indicate the reasons for their answers in the second round. The second form was sent to 23 experts who responded in the first round, and 17 experts responded. The return rate of experts to the second round is approximately 74%.



**Table 5** First-Round Delphi Study Results

Cluster Formation and Collaboration Strategies		Delphi Consensus Criteria				
		$\bar{X}$	Med	S	IQR	%
C1	To encourage the growth of relationships, communication, and collaboration among the participants (stakeholders) in the Kuşadası Marine Tourism Sector and to establish a suitable framework to ensure coordination	4,17	5	1,07	1	78%
C2	To recognize the complementary skills of potential cluster stakeholders, organizing their meeting, working together to develop projects or businesses, and defending their shared interests	4	4	1,04	1	83%
C3	To target prudent financial management, long-term financial planning, and the platform's eventual self-sufficiency.	4,09	4	1,04	1	78%
C4	To provide incentives and support to marine tourism stakeholders from development agencies and the government*	3,87	4	1,14	<u>2</u>	74%
C5	To offer companies consulting and support services on a national and international level for project design and execution*	<u>3,74</u>	4	1,29	<u>3</u>	<u>57%</u>
C6	To share statistical information with potential cluster participants	4,22	5	1,09	1	78%
C7	To provide competitive advantage, growth and employment for the Kuşadası region and to increase the relative importance of the marine tourism economy in the regional economy.	4,31	5	1,06	1	83%
C8	To organize events to promote and increase locals' awareness of marine tourism	4,09	5	1,20	1	78%
<b>Bureaucracy-Related Strategies</b>		$\bar{X}$	Med	S	IQR	%
B1	Making a master plan and action plan for marine tourism	4,04	4	1,19	1	78%
B2	To be able to quickly respond to sectoral changes by monitoring global trends, and to develop a marine tourism policy in collaboration with regional and national authorities*	<u>3,7</u>	4	1,3	<u>3</u>	<u>65%</u>
B3	To encourage the regulation of legislation and laws pertaining to the sector's development, as well as to create fresh ideas*	<u>3,83</u>	4	1,37	<u>2</u>	74%
B4	To organize the marine tourism sector around a strategic vision that consists of short-, medium-, and long-term, global, measurable, consistent, and coordinated goals*	4,04	4	1,15	<u>2</u>	74%
<b>Promotion, Marketing, and Innovation Strategies</b>		$\bar{X}$	Med	S	IQR	%
P1	Arranging for national and international promotion days, participation in fairs, workshops, gatherings of like-minded people, and other similar events	4,17	5	1,07	1	78%
P2	To organize national and international promotion, marketing, and branding activities in order to increase the sector's competitiveness on both national and international platforms.	4,17	4	0,98	1	78%
P3	To establish regional tourist destinations, to promote the local historical and cultural heritage as a draw, and to use alternative forms of tourism to combat the seasonality issue.	4,04	4	1,06	1	83%
P4	Enhancing the online presence and social media visibility of the Kuşadası marine tourism cluster	4,04	4	0,93	1	78%
P5	To guide and encourage actors to R&D activities, innovation and entrepreneurship*	<u>3,52</u>	4	1,38	<u>3</u>	<u>52%</u>
<b>Education and Employment Strategies</b>		$\bar{X}$	Med	S	IQR	%
EE1	Raising awareness by training sector stakeholders on the concept of clustering through knowledge producing institutions and developing curricula for each business line*	<u>3,65</u>	4	1,4	<u>2</u>	<u>65%</u>
EE2	To produce projects with a high added value and to transfer knowledge and technology to service providers through academic research	4,04	4	1,1	1	78%
EE3	With the assistance of educational institutions, to train proficient English-speaking technical and administrative personnel, and to develop an employment policy*	4,04	5	1,33	<u>2</u>	<u>65%</u>
EE4	Organizing activities for the sector's workforce to receive professional development training and certification in order to advance their knowledge and abilities.	4,09	4	1,04	1	78%
<b>Environmental Strategies</b>		$\bar{X}$	Med	S	IQR	%
E1	Collaborating with academic institutions and the Ministry of Environment, Urbanization, and Climate Change to conduct environmental sustainability studies*	<u>3,61</u>	4	1,27	<u>3</u>	<u>%52</u>
E2	To conduct feasibility studies to address the issue of the bay and mooring area	4	4	1,31	1	%78
E3	Increasing the applicability of the blue card system and establishing a waste collection facility	4,17	5	1,19	1	%78

$\bar{X}$  = Arithmetic Mean, Med = Median, S=Standard Deviation, IQR= Interquartile range, %=The Level of Consensus

\* Non consensus strategy

Source: Prepared by Author

**Table 6** Second-Round Delphi Study Results

	First Round Delphi Consensus Criteria					Second Round Delphi Consensus Criteria				
	$\bar{x}$	Med	S	IQR	%	$\bar{x}$	Med	S	IQR	%
By direction of a potential marine tourism cluster, development agencies and the government could provide incentives and support to those involved in marine tourism.	<u>3,87</u>	4	1,14	<u>2</u>	74%	4,15	4	0,9	1	82
Providing national and international consultancy and support services to companies in the project design and execution of projects, thanks to the potential marine tourism cluster*	<u>3,74</u>	4	1,29	<u>3</u>	<u>57%</u>	<u>3,77</u>	4	1,01	1	70
To monitor global changes, immediately produce a sectoral reflex, and jointly develop a marine tourism policy with local and central governments as a potential marine tourism cluster*	<u>3,7</u>	4	1,3	<u>3</u>	<u>65%</u>	<u>3,15</u>	<u>3</u>	0,8	<u>2</u>	<u>41</u>
Supporting the development of new proposals and the regulation of existing legislation and laws related to the sector's development	<u>3,83</u>	4	1,37	<u>2</u>	74%	4,06	4	0,96	1	82
To organize the potential marine tourism cluster around a strategic vision with quantifiable, unified, and coordinated targets for the marine tourism sector over the short, medium, and long terms, both globally and sectorally*	4,04	4	1,15	<u>2</u>	74%	<u>3,46</u>	<u>3,5</u>	0,97	1	<u>47</u>
To guide and encourage potential marine tourism cluster actors to R&D activities, innovation and entrepreneurship*	<u>3,52</u>	4	1,38	<u>3</u>	<u>52%</u>	<u>3,69</u>	4	0,85	1	<u>53</u>
By educating sector stakeholders about the concept of clustering and creating curricula for each business line with the assistance of potential marine tourism clusters and knowledge producing organizations	<u>3,65</u>	4	1,4	<u>2</u>	<u>65%</u>	4,06	4	0,88	1	75
To develop an employment policy, with the assistance of a potential marine tourism cluster, and to train qualified technical and administrative personnel who can speak English.	4,04	5	1,33	<u>2</u>	<u>65%</u>	4	4	1	1	82
To carry out studies on environmental sustainability in cooperation with the potential marine tourism cluster management, academic institutions and the Ministry of Environment, Urbanization and Climate Change.	<u>3,61</u>	4	1,27	<u>3</u>	<u>%52</u>	4,06	4	0,75	1	75

$\bar{X}$  = Arithmetic Mean, Med = Median, S=Standard Deviation, IQR= Interquartile range, %=The Level of Consensus

\* Non consensus strategy

Source: Prepared by Author

A consensus could not be reached in the 2nd Round on the applicability of the strategy developed for providing consultancy and support services. Due to the low rate of applicability of the strategy, it could not be agreed upon and this strategy has been excluded from the developed strategies. Various support mechanisms of the ministries can be used for consultancy services. Firms cannot allocate a budget for their own consultancy services. Ministries, on the other hand, have more important problems to solve. In this respect, this strategy seems feasible. The sector is anticipated to benefit if the strategy is put into action. The potential Kuşadası Marine Tourism Cluster can benefit from seven of the eight cluster formation and cooperation strategies that have been developed.

A consensus could not be reached in the second round on the applicability of the bureaucratic strategy for developing a marine tourism policy. Experts conclude that this strategy is not applicable for the cluster. According to experts, local governments may take and implement decisions more quickly, but the central government remains

bureaucratically clumsy in such processes. Since it is an element of politics within local and central government, the policy development process cannot progress efficiently. First and foremost, it is important to fix the issues with the laws, regulations, and practices in place today. The sector will improve greatly and will benefit all marine tourism stakeholders if a policy can be established and put into place.

In the second round, there has been no agreement on whether the developed bureaucratic strategy has been applicable to the strategic vision. The experts' responses led to the conclusion that this strategy is not appropriate for the potential cluster. By jointly developing a vision, all clusters can achieve a common denominator as a result of clustering. Databases and statistical infrastructure are crucial in this field. Data sharing must first be implemented in the sector. Implementation could be challenging. Too many issues need to be resolved before creating a unified vision.

In the second round, a consensus could not be reached on the applicability of the strategy "To guide and encour-

age potential marine tourism cluster actors to R&D activities, innovation and entrepreneurship". The mean value is less than 4 (3.69) and the level of agreement is less than 70% (53%). Experts attending the Delphi session think that it may be difficult to develop R&D activities in the service sector. Kuşadası Marine Tourism sector stakeholders do not follow innovations and R&D activities and do not pay enough attention to them. It is a very important strategy in terms of regional and sectoral development. However, according to experts, there are difficulties in its applicability.

#### 4 Discussion

According to an evaluation using Porter's Diamond Model, the marine tourism sector in Kuşadası can compete in favor of favorable weather, historical, religious and cultural values, geographical location, ease of transportation, being known in the international market, skilled technical personnel, presence of information institutions, importance of the local government in the sector, having all the components of marine tourism. It is clear that there is a need for a chain management body that includes all stakeholders and takes the necessary steps to develop marine tourism and increase its market share, instead of creating difficulties [14], [29]. The absence of an authority that gathers all stakeholders, has authority, can contribute, can bring the sector and the public together and can propose the strategies to be planned to the higher institution creates a negative effect for the Kuşadası marine tourism sector. This negativity can be solved by clustering. For the success of clusters, it is important to analyze these factors well, to determine which of them will be effective in what way, and to determine the deficiencies and needs, if any, and to take measures for this situation [1].

Taking into account the current challenges and future opportunities for a marine tourism cluster in Kuşadası, the following strategies have been developed:

- To promote the growth of relations, communication and cooperation among the participants (stakeholders) in the Kuşadası Marine Tourism Sector and to establish an appropriate framework to ensure coordination.
- Recognizing the complementary skills of potential cluster stakeholders, organizing their meeting, working together to develop projects or businesses and defending their common interests.
- To ensure prudent financial management, long-term financial planning and the eventual self-sufficiency of the platform.
- By leading a potential marine tourism cluster, development agencies and the government could provide incentives and support to those involved in marine tourism.
- To share statistical information with potential cluster participant.

- To provide competitive advantage, growth and employment for the Kuşadası region and to increase the relative importance of the marine tourism economy in the regional economy.
- To organize events to promote and increase locals' awareness of marine tourism
- Making a master plan and action plan for marine tourism
- Supporting the development of new proposals and the regulation of existing legislation and laws related to the sector's development
- Arranging for national and international promotion days, participation in fairs, workshops, gatherings of like-minded people, and other similar events
- To organize national and international promotion, marketing, and branding activities in order to increase the sector's competitiveness on both national and international platforms.
- To establish regional tourist destinations, to promote the local historical and cultural heritage as a draw, and to use alternative forms of tourism to combat the seasonality issue.
- Enhancing the online presence and social media visibility of the Kuşadası marine tourism cluster
- By educating sector stakeholders about the concept of clustering and creating curricula for each business line with the assistance of potential marine tourism clusters and knowledge producing organizations
- To produce projects with a high added value and to transfer knowledge and technology to service providers through academic research
- To develop an employment policy, with the assistance of a potential marine tourism cluster, and to train qualified technical and administrative personnel who can speak English.
- Organizing activities for the sector's workforce to receive professional development training and certification in order to advance their knowledge and abilities.
- To carry out studies on environmental sustainability in cooperation with the potential marine tourism cluster management, academic institutions and the Ministry of Environment, Urbanization and Climate Change.
- To conduct feasibility studies to address the issue of the bay and mooring area
- Increasing the applicability of the blue card system and establishing a waste collection facility.

#### 5 Conclusions

The comprehensive research highlights the need to implement strategic development projects in the context of the marine tourism sector in the Kuşadası region, which is studied as a case study. It is clear that a collective effort centred on strategic planning, cooperation with stakehold-

ers and efficient resource management is required to support sustainable growth and gain a competitive edge in this sector. Specific goals need to be set for the growth and development of the marine tourism sector in Kuşadası. It is obvious that there is a need for a chain organization that involves all stakeholders and works to develop marine tourism and increase its market share instead of creating problems. This industry cluster is a chain organization.

The use of semi-structured interviews has played a crucial role in identifying key areas of focus, thus influencing the comprehensive strategies necessary for the development of a prospective marine tourism cluster in Kuşadası. These strategies are not only based on idealistic notions, but also on practical methods identified through thorough analysis and stakeholder input.

In order to gain a competitive advantage, the cluster approach has been used in the marine tourism sector. In this context, it has become clear whether sectoral competition can be developed through clustering for all stakeholders. The scope and objectives of the cluster strengthening project need to be defined before developing a sustainable and action-oriented strategic plan, which is essential for a successful cluster strategy. They need to be able to identify how their region will be different from others and how it will be positioned in the global economy. All relevant stakeholders can unite around a common vision. The implementation of the proposed strategies from the stakeholders' point of view contributed to the practical applicability of the study.

### 5.1 Theoretical Contribution

This study is the first in-depth analysis of Kuşadası that assesses its perspectives on clustering, examines its competitiveness and develops a proposed strategy. The study is significant because it provides a comprehensive view of clustering.

The clustering strategy was proposed from the perspective of sector stakeholders. With the involvement of stakeholders in the marine tourism sector, strategies that could be used in the potential Kuşadası Marine Tourism Cluster have been made clear.

It is seen that many studies have been carried out in recent years on clustering in Türkiye and in the world. However, it is believed that this study will contribute to the literature, since the concept of clustering is associated with the marine tourism sector in the literature. It will be a resource for people doing scientific research for similar studies in the future. It is thought that by realizing the objectives of the research, it will make an original contribution to the lack in the literature.

Potential clustering studies are critical for gathering information that will serve as the foundation for studies to be conducted in order to launch clustering initiatives. With its detailed and holistic approach, this study aims to fill a gap in the literature by developing a competitive analysis,

clustering approach, and strategy proposal for the marine tourism sector.

### 5.2 Practical Contribution

This study provides key advice for managers who want to assess the competitiveness of the marine tourism sector. The study is intended to support regional development efforts and the clustering of the marine tourism sector.

The research and analysis findings are intended to assist in research of regional development and the clustering of the marine tourism sector in Kuşadası. It is hoped that the findings will serve as a study that can be used in other areas and serve as an example. This study also makes recommendations for strategies that could be created and used to help form a potential cluster.

As a result, clustering perspectives and benefits will be transferred to sector stakeholders. Its contribution to the sector is unique in that it sheds light on the sectoral clustering approach and regional strategies.

### 5.3 Limitations and Recommendations

There are some limitations to the study that require further research. Due to the limited duration of this study and the seasonal nature of marine tourism, only a relatively small number of experts working with marine tourism stakeholders were contacted. In future studies, the number of samples can be increased and the views of stakeholders in the sector can be grouped and compared using different criteria weighting techniques.

The research was carried out only in the Kuşadası marine tourism sector. Comprehensive studies, including the entire marine tourism sector in Türkiye, can be carried out.

Cluster theory was used in this study. There are several theoretical bases on which the study can be conducted. The study also used qualitative methods. Quantitative techniques can also be used to study clustering. Future research can use a variety of techniques to investigate the issue of clustering in marine tourism.

The results may have been influenced by pandemic conditions, as the study was conducted during the Covid-19 pandemic. The research can be repeated in subsequent studies under typical conditions and the results can be compared.

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