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Cooperation between travel agencies and tour operators in the organisation of heritage and cultural tourism trips in the European Union countries

Abstract. This study aimed to develop a cluster-based structure of the tourism market and to identify trends in the development of the tourism sector by assessing the productivity of travel agencies and tour operators in the European Union and Ukraine in the context of organising international and domestic heritage and cultural tourism trips. The analysis employed a range of methods, including cluster analysis, statistical techniques, data standardisation, a matrix-based approach, and comparative analysis. To evaluate the productivity of tourism enterprises, the following indicators were calculated: value added per enterprise, turnover per enterprise, value added per employee, and turnover per employee. The application of hierarchical clustering enabled the classification of countries into three groups based on the productivity levels of travel agencies and tour operators: high, medium, and low. Ukraine was placed in the group with low productivity for both travel agencies and tour operators. The findings revealed that most EU countries demonstrate stable productivity in both categories of tourism enterprises, indicating a consistent level of tourism market development. However, some countries exhibit discrepancies between the productivity levels of travel agencies and tour operators. These differences can be attributed to specific market conditions, business strategies, and the underlying economic model of tourism. To determine whether travel agencies and tour operators are primarily focused on organising domestic or international tourism trips, and

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to evaluate their effectiveness in these areas, an indicator reflecting the ratio of organised domestic to international tourism trips is proposed. Using a matrix approach, which cross-references the productivity level of tourism enterprises with the direction of tourism flows, EU countries were clustered according to similarities in their performance in organising heritage and cultural tourism trips. The results of the grouping suggest that domestic tourism is a key factor contributing to the high productivity of tourism enterprises in leading EU countries. The findings may inform the development of strategies aimed at improving the efficiency of tourism enterprises, including through optimising business models, attracting international tourists, and enhancing the organisation of domestic tourism trips

Keywords: tourism enterprise; historical and cultural heritage; efficiency; productivity; tourism market; international and domestic tourism

INTRODUCTION

Heritage and cultural tourism are vital components of the tourism industry, particularly in the European Union, which hosts numerous World Heritage Sites. Organising such trips requires well-coordinated interaction between tour operators and travel agencies, as they play a key role in developing itineraries, managing logistics, booking services, and promoting destinations. In the current context of market competition and digitalisation, tourism companies actively seek new collaboration models that optimise processes and enhance service quality. Establishing effective communication between tour operators, who develop comprehensive tourism products, and travel agencies, which directly interact with clients and shape demand, is particularly important.

Tourism companies may focus on different operational directions: international or domestic tourism. International tourism primarily involves attracting travellers to cross-border journeys, which requires an extensive network of global partnerships, adapting offers to various market demands, and complying with the regulatory frameworks of different countries. Meanwhile, domestic tourism promotes national cultural heritage, stimulates regional development, and creates attractive tourism products for residents. Regardless of the chosen focus, the operational efficiency of tourism companies is a key factor in their competitiveness and long-term success. Efficiency is particularly critical in the face of global challenges such as economic instability, shifting traveller preferences, environmental regulations, and the impact of global crises on the travel industry. Therefore, studying the performance of tour operators and travel agencies and identifying ways to enhance their efficiency is a timely and relevant research objective. Analysing trends and challenges will improve understanding of heritage and cultural tourism organisations and support more informed managerial decision-making in this sector.

Research on the role of tour operators and travel agencies in organising heritage and cultural trips in the European Union is gaining increasing significance in academic literature. Researchers are placing growing emphasis on the importance of integrating advanced technologies and digital platforms, which are significantly transforming the travel planning process. One key area of study involves analysing recommendations generated through traveller reviews on online platforms and tourists' activities during hotel or flight bookings, which contributes to the development of personalised travel itineraries (Nikas, 2024).

The efficiency of tourism companies is another actively researched topic, as the competitiveness and sustainable development of the industry largely depend on companies' ability to adapt to market changes, technological progress, and consumer trends. For instance, Croatian scholars V. Zaninović & A. Host (2021) analyse the impact of firm-level variables (total assets, number of employees) and country-level variables (number of arrivals) on the operational revenues of travel agencies and tour operators in the EU. Their findings indicate significant differences between the determinants of operational revenues for travel agencies and tour operators, with even more pronounced disparities between Northern and Southern European countries.

Another group of researchers, A. Coelho & V.M. Castillo-Girón (2020), investigate the determinants of exchange environments in mergers and acquisitions within the tourism industry. They conclude that travel agencies and tour operators operate in an unstable environment, where industry investments involve substantial sunk costs in addition to economies of scale. A study of Polish travel agencies in the context of global health threats (Franczak & Bakota, 2024) reveals that companies may resort to manipulating profitability indicators through accrual management during periods of economic instability. This highlights the importance of a comprehensive analysis of both operational efficiency and financial transparency among tourism enterprises within the integrated economic space of the EU.

While the aforementioned studies primarily focus on financial and operational indicators, scholars P. Rodríguez & J.S. García (2022) emphasise the role of influencers in enhancing the efficiency of tourism companies' digital marketing. Their research examines travel agencies and tour operators, providing an overview of the most advanced methods for measuring digital marketing performance employed by leading tourism firms in Spain. Additionally, the specificity and productivity of tourism companies are influenced by risk and environmental instability. This aspect is explored in studies by A. Grigorescu *et al.* (2021), as well as I. Veríssimo & R. Costa (2021). These researchers analyse the significance of travel agencies within the tourism sector, the risk management strategies they can adopt, and measures to mitigate risks and potential consequences during times of crisis.

An important topic in academic publications is the study of domestic and international tourism. For example,

researchers G. Harb & C. Bassil (2022), using regional data from EU countries, assess the impact of tourist arrivals (total, domestic, and foreign) on regional growth from 2000 to 2018. Their findings indicate that the influx of domestic and total tourism contributes positively and significantly to regional development. In contrast, the positive effect of foreign tourism is statistically evident primarily in regions that serve as key destinations for international tourists. Similarly, scholars E. Sánchez-Dávila & L.Y. García (2025) examine how the origin of tourism – domestic or foreign – affects poverty reduction. Their research concludes that domestic tourism contributes more significantly to poverty alleviation than international tourism, even though, on average, foreign tourists tend to stay longer in tourist destinations than domestic travellers. These researchers underscore the need to prioritise domestic tourism development within poverty reduction policies.

Thus, scholars dedicate significant attention to examining the efficiency of tourism companies, including analyses of their business models, the impact of various determinants on performance, the effectiveness of marketing strategies, and their resilience to market fluctuations. Additionally, the role of domestic and international tourism

in the development of the tourism industry is extensively explored, particularly regarding their effects on the economy, regional employment, and cultural exchange. However, despite the extensive body of research in this field, there remains insufficient exploration of the productivity of travel agencies and tour operators in EU countries in relation to the organisation of both international and domestic tourism trips. In particular, the effectiveness of their collaboration, the optimisation of operational processes, and the implementation of innovative strategies to enhance competitiveness in the European market remain open questions. This highlights the need for further analysis of the mechanisms and outcomes of their activities, as well as the identification of ways to improve the efficiency of tourism operations. This article aimed to assess the efficiency of travel agencies and tour operators in EU countries in organising heritage and cultural international and domestic tourism trips.

MATERIALS AND METHODS

This study was conducted in several stages to determine the efficiency of travel agencies and tour operators in EU countries in organising heritage and cultural tourism trips, both international and domestic (Fig. 1).

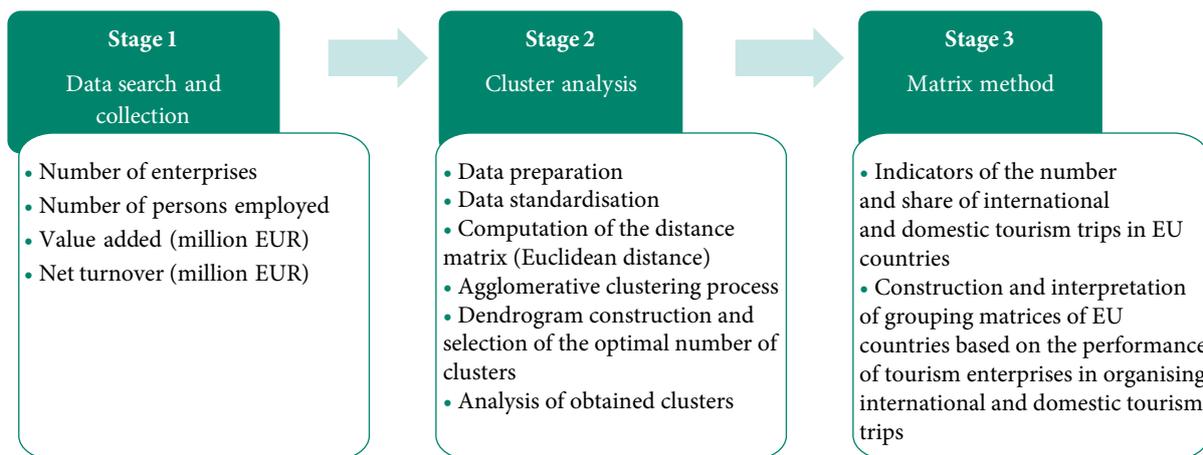


Figure 1. Research methodology

Source: compiled by the authors

The first stage involved searching for and collecting statistical data on the activities of tourism companies. The statistical basis for the study comprised data on the operations of travel agencies and tour operators published by the Statistical Office of the European Union (Eurostat, 2025a; 2025b). In the second stage, a cluster analysis method was applied to the process of statistical data by grouping Ukraine and EU countries based on the productivity levels of travel agencies and tour operators. The statistical reports provide absolute data on the number of enterprises, employees, value added, net turnover, and other indicators. However, using relative productivity indicators allows for a more meaningful classification of countries according to the level of development and efficiency of tourism industry entities. Therefore, the following relative productivity

indicators were proposed for analysis: Value added per enterprise = Value added / Enterprises; Net turnover per enterprise = Net turnover / Enterprises; Value added per employee = Value added / Persons employed; Net turnover per employee = Net turnover / Persons employed.

According to the authors, the use of productivity indicators instead of absolute values enables:

- Ensuring comparability between countries regardless of their scale. For example, a large number of tourism enterprises in a country does not necessarily indicate high efficiency;
- Reflecting the efficiency level of the tourism sector rather than merely its overall size;
- Reducing the influence of population size and country area, focusing instead on the productivity of tourism enterprises and employees.

The hierarchical clustering algorithm consisted of the following stages: data preparation; data standardisation to ensure a uniform measurement scale; calculation of the distance matrix (Euclidean distance was used to determine the similarity between objects); agglomerative clustering process (pairwise merging of the closest clusters based on the selected linkage criterion – Ward’s method); visualisation of the hierarchical cluster structure using a dendrogram and determination of the optimal number of clusters; analysis of the resulting clusters and identification of the characteristics of each country group. The hierarchical cluster analysis was conducted using STATISTICA 10 software.

Consistent and finalised datasets were required to accurately apply cluster, matrix, and comparative analysis. For this reason, the year 2022 was chosen as the base year for the study, as statistical data – particularly at the EU country level – are typically published with a significant delay and generally become available only 1.5 to 2 years after the end of the reporting period. At the time the research was conducted, the data for 2022 were the most recent fully available and suitable for comparative analysis. Data for 2023–2024 had not yet been finalised and remained incomplete, posing a risk of distorting the research findings.

The third stage involved constructing matrices to compare the productivity levels of tourism enterprises with the focus of tourism trips. Indicators were used to classify countries based on the orientation of tourism enterprises, reflecting the ratio of organised domestic and international tourist trips. As a result of applying the matrix method, EU countries were grouped according to the productivity of tourism enterprises in organising heritage and cultural tourism trips for both international and domestic purposes.

RESULTS AND DISCUSSION

Statistical data on the activities of travel agencies and tour operators in Ukraine and EU countries are grouped according to the detailed types of economic activity based on the NACE Rev. 2 classification (the European system for classifying economic activities). These data are presented

in Section N, Administrative and Support Service Activities, Division 79, Travel agency and tour operator activities, other reservation service and related activities (State Statistics Committee of Ukraine, 2010): 1) Class 79.11 Travel agency activities. This class includes the activities of agencies engaged in organising travel and tours and providing short-term accommodation services, which are sold both wholesale and retail to a broad range of consumers or commercial clients. 2) Class 79.12 Tour operator activities. This class includes the organisation and execution of tours, which are sold either through travel agencies or directly by tour operators. Tour organisation may include transportation, accommodation, catering, visits to museums and heritage or cultural sites, and attendance at theatrical, musical or sporting events.

Travel agencies and tour operators play a key role in organising tourism trips and ensuring high-quality service and comfort for travellers. Tour operators are responsible for developing tourism products and creating packages that include transport, accommodation, excursions, insurance, and other services. They cooperate with airlines, hotels, and local partners to offer favourable conditions to clients. Travel agencies, in turn, act as intermediaries between tour operators and tourists, helping clients select the most suitable travel options according to their preferences and budgets. They provide consultations, book tours, assist with visa arrangements and insurance, and support clients throughout their journey. Owing to their work, tourists benefit from professional assistance, reduced risks, and a more relaxed and organised travel experience.

The primary indicators proposed for grouping countries are performance metrics of travel agencies and tour operators, such as value added per enterprise, turnover per enterprise, value added per employee, and turnover per employee. The performance indicators of travel agencies and tour operators in Ukraine and EU countries are presented in Tables 1 and 2. The standardised productivity indicators of travel agencies and tour operators in Ukraine and EU countries are shown in Table 3.

Table 1. Indicators of the efficiency of travel agencies in Ukraine and EU countries, 2022

| Country | Absolute efficiency indicators | | | | Productivity indicators | | | |
|----------|--------------------------------|--------------------------|--------------------------|---------------------------|---|--|---|--|
| | Enterprises. number | Persons employed. number | Value added. million EUR | Net turnover. million EUR | Value added per enterprise. Col. 4 : Col. 2 | Turnover per enterprise. Col. 5 : Col. 2 | Value added per employee. Col. 4 : Col. 3 | Turnover per employee. Col. 5 : Col. 3 |
| Ukraine | 6,761 | 8,851 | 18.8 | 29.86 | 0.003 | 0.004 | 0.002 | 0.003 |
| Belgium | 1,070 | 3,962 | 238.69 | 1,784.47 | 0.223 | 1.668 | 0.06 | 0.45 |
| Bulgaria | 410 | 949 | 14.3 | 82.91 | 0.035 | 0.202 | 0.015 | 0.087 |
| Czechia | C | C | C | C | C | C | C | C |
| Denmark | 240 | 1,814 | 121.62 | 1,005.48 | 0.507 | 4.19 | 0.067 | 0.554 |
| Germany | 6,713 | 35,849 | 2,500.6 | 5,026.82 | 0.373 | 0.749 | 0.07 | 0.14 |
| Estonia | 175 | 601 | 20.76 | 226.45 | 0.119 | 1.294 | 0.035 | 0.377 |
| Ireland | 392 | 1,901 | 120.95 | 719.21 | 0.309 | 1.835 | 0.064 | 0.378 |
| Greece | 2,597 | 14,598 | 430.06 | 2,017.22 | 0.166 | 0.777 | 0.029 | 0.138 |

Table 1. Continued

| Country | Absolute efficiency indicators | | | | | Productivity indicators | | |
|-------------|--------------------------------|--------------------------|--------------------------|---------------------------|---|--|---|--|
| | Enterprises, number | Persons employed, number | Value added, million EUR | Net turnover, million EUR | Value added per enterprise, Col. 4 : Col. 2 | Turnover per enterprise, Col. 5 : Col. 2 | Value added per employee, Col. 4 : Col. 3 | Turnover per employee, Col. 5 : Col. 3 |
| Spain | 8,905 | 37,116 | 1,721.15 | 16,543.05 | 0.193 | 1.858 | 0.046 | 0.446 |
| France | 3,034 | 14,355 | 867.24 | 3,519.76 | 0.286 | 1.16 | 0.06 | 0.245 |
| Croatia | 1,602 | 4,702 | 113.77 | 651.04 | 0.071 | 0.406 | 0.024 | 0.138 |
| Italy | 5,104 | 17,013 | 657.7 | 4,119.44 | 0.129 | 0.807 | 0.039 | 0.242 |
| Cyprus | 296 | 1,390 | 64.93 | 99.78 | 0.219 | 0.337 | 0.047 | 0.072 |
| Latvia | 314 | 653 | 6.36 | 128.61 | 0.02 | 0.41 | 0.01 | 0.197 |
| Lithuania | 302 | 1,338 | 34.81 | 207.23 | 0.115 | 0.686 | 0.026 | 0.155 |
| Luxembourg | 60 | 471 | 22.48 | 108.17 | 0.375 | 1.803 | 0.048 | 0.23 |
| Hungary | 398 | 895 | 17.12 | 130.41 | 0.043 | 0.328 | 0.019 | 0.146 |
| Malta | 134 | 431 | 14.18 | 41.08 | 0.106 | 0.307 | 0.033 | 0.095 |
| Netherlands | 2,921 | 12,210 | C | C | C | C | C | C |
| Austria | 916 | 7,490 | 326.62 | 2,620.61 | 0.357 | 2.861 | 0.044 | 0.35 |
| Poland | 2,423 | 6,664 | 107.55 | 1,307.21 | 0.044 | 0.54 | 0.016 | 0.196 |
| Portugal | 2,235 | 9,216 | 277.23 | 2,297.71 | 0.124 | 1.028 | 0.03 | 0.249 |
| Romania | 1,338 | 3,738 | 85.03 | 506.23 | 0.064 | 0.378 | 0.023 | 0.135 |
| Slovenia | 273 | 627 | 20.35 | 157.6 | 0.075 | 0.577 | 0.032 | 0.251 |
| Slovakia | 668 | 975 | 14.8 | 113.77 | 0.022 | 0.17 | 0.015 | 0.117 |
| Finland | 280 | 818 | 39.09 | 265.99 | 0.14 | 0.95 | 0.048 | 0.325 |
| Sweden | 575 | 2,503 | 226.43 | 1,195.79 | 0.394 | 2.08 | 0.09 | 0.478 |

Notes: C – data are confidential

Source: compiled and calculated by the authors based on Eurostat (2025a)

Table 2. Indicators of the efficiency of tour operators in Ukraine and EU countries, 2022

| Country | Absolute efficiency indicators | | | | | Productivity indicators | | |
|-------------|--------------------------------|--------------------------|--------------------------|---------------------------|---|--|---|--|
| | Enterprises, number | Persons employed, number | Value added, million EUR | Net turnover, million EUR | Value added per enterprise, Col. 4 : Col. 2 | Turnover per enterprise, Col. 5 : Col. 2 | Value added per employee, Col. 4 : Col. 3 | Turnover per employee, Col. 5 : Col. 3 |
| Ukraine | 716 | 3,289 | 17.72 | 50.78 | 0.025 | 0.071 | 0.005 | 0.015 |
| Belgium | 354 | 2,196 | 178.14 | 1,328.32 | 0.503 | 3.752 | 0.081 | 0.605 |
| Bulgaria | 1,023 | 3,391 | 54.13 | 677 | 0.053 | 0.662 | 0.016 | 0.2 |
| Czechia | C | C | C | C | C | C | C | C |
| Denmark | 272 | 1,803 | 104.66 | 1,208.44 | 0.385 | 4.443 | 0.058 | 0.67 |
| Germany | 2,922 | 39,162 | 2,972.67 | 22,696.88 | 1.017 | 7.768 | 0.076 | 0.58 |
| Estonia | 159 | 319 | 7.88 | 120.76 | 0.05 | 0.759 | 0.025 | 0.379 |
| Ireland | 350 | 1,233 | 79.96 | 295.56 | 0.228 | 0.844 | 0.065 | 0.24 |
| Greece | C | C | C | C | C | C | C | C |
| Spain | 230 | 4,402 | 189.31 | 1,949.59 | 0.823 | 8.476 | 0.043 | 0.443 |
| France | 1,298 | 14,304 | 714.38 | 5,016.52 | 0.55 | 3.865 | 0.05 | 0.351 |
| Croatia | 137 | 523 | 12.01 | 70.39 | 0.088 | 0.514 | 0.023 | 0.135 |
| Italy | 4,653 | 17,055 | 698.94 | 6,239.99 | 0.15 | 1.341 | 0.041 | 0.366 |
| Cyprus | 25 | 70 | 0.93 | 2.84 | 0.037 | 0.114 | 0.013 | 0.041 |
| Latvia | 241 | 519 | 6.96 | 194.4 | 0.029 | 0.807 | 0.013 | 0.375 |
| Lithuania | 152 | 539 | 16.04 | 267.55 | 0.106 | 1.76 | 0.03 | 0.496 |
| Luxembourg | 11 | 53 | 1.46 | 7.93 | 0.133 | 0.721 | 0.028 | 0.15 |
| Hungary | 660 | 2,385 | 52.36 | 506.14 | 0.079 | 0.767 | 0.022 | 0.212 |
| Malta | 84 | 511 | 15.76 | 156.74 | 0.188 | 1.866 | 0.031 | 0.307 |
| Netherlands | 1,770 | 6,315 | 423.55 | 3,566.97 | 0.239 | 2.015 | 0.067 | 0.565 |

Table 2. Continued

| Country | Absolute efficiency indicators | | | | Productivity indicators | | | |
|----------|--------------------------------|--------------------------|--------------------------|---------------------------|---|--|---|--|
| | Enterprises, number | Persons employed, number | Value added, million EUR | Net turnover, million EUR | Value added per enterprise, Col. 4 : Col. 2 | Turnover per enterprise, Col. 5 : Col. 2 | Value added per employee, Col. 4 : Col. 3 | Turnover per employee, Col. 5 : Col. 3 |
| Austria | 150 | 1,150 | 56.2 | 377.9 | 0.375 | 2.519 | 0.049 | 0.329 |
| Poland | 2,636 | 8,093 | 181.58 | 2,144.32 | 0.069 | 0.813 | 0.022 | 0.265 |
| Portugal | 567 | 1,448 | 43.44 | 368.98 | 0.077 | 0.651 | 0.03 | 0.255 |
| Romania | 1,015 | 3,723 | 95.56 | 579.14 | 0.094 | 0.571 | 0.026 | 0.156 |
| Slovenia | 262 | 768 | 32.04 | 278.91 | 0.122 | 1.065 | 0.042 | 0.363 |
| Slovakia | 495 | 1,562 | 42.99 | 632.56 | 0.087 | 1.278 | 0.028 | 0.405 |
| Finland | 241 | 692 | 9.64 | 471.57 | 0.04 | 1.957 | 0.014 | 0.681 |
| Sweden | 1,040 | 3,485 | 102.49 | 2,628.91 | 0.099 | 2.528 | 0.029 | 0.754 |

Notes: C – data are confidential

Source: compiled and calculated by the authors based on Eurostat (2025a)

Table 3. Standardised productivity indicators of travel agencies and tour operators in Ukraine and EU countries, 2022

| Country | Conditional notation | Productivity indicators of travel agency activities | | | | Country | Conditional notation | Productivity indicators of the tour operator activities | | | |
|-------------|----------------------|---|-------------------------|--------------------------|-----------------------|-------------|----------------------|---|-------------------------|--------------------------|-----------------------|
| | | Value added per enterprise | Turnover per enterprise | Value added per employee | Turnover per employee | | | Value added per enterprise | Turnover per enterprise | Value added per employee | Turnover per employee |
| Ukraine | C_1 | -1.222 | -1.100 | -1.696 | -1.655 | Ukraine | C_1 | -0.759 | -0.901 | -1.507 | -1.742 |
| Belgium | C_2 | 0.354 | 0.643 | 1.025 | 1.490 | Belgium | C_2 | 1.129 | 0.821 | 2.230 | 1.244 |
| Bulgaria | C_3 | -0.992 | -0.892 | -1.086 | -1.064 | Bulgaria | C_3 | -0.649 | -0.625 | -0.966 | -0.806 |
| Denmark | C_4 | 2.389 | 3.285 | 1.353 | 2.222 | Denmark | C_4 | 0.663 | 1.144 | 1.099 | 1.573 |
| Germany | C_5 | 1.429 | -0.320 | 1.494 | -0.691 | Germany | C_5 | 3.160 | 2.700 | 1.984 | 1.118 |
| Estonia | C_6 | -0.391 | 0.251 | -0.148 | 0.977 | Estonia | C_6 | -0.660 | -0.579 | -0.524 | 0.100 |
| Ireland | C_7 | 0.970 | 0.818 | 1.213 | 0.984 | Ireland | C_7 | 0.043 | -0.540 | 1.443 | -0.603 |
| Greece | C_8 | -0.054 | -0.290 | -0.429 | -0.705 | Greece | - | - | - | - | - |
| Spain | C_9 | 0.139 | 0.842 | 0.368 | 1.462 | Spain | C_8 | 2.394 | 3.032 | 0.361 | 0.424 |
| France | C_10 | 0.806 | 0.111 | 1.025 | 0.048 | France | C_9 | 1.315 | 0.874 | 0.705 | -0.041 |
| Croatia | C_11 | -0.735 | -0.679 | -0.664 | -0.705 | Croatia | C_10 | -0.510 | -0.694 | -0.622 | -1.135 |
| Italy | C_12 | -0.319 | -0.259 | 0.040 | 0.027 | Italy | C_11 | -0.265 | -0.307 | 0.263 | 0.035 |
| Cyprus | C_13 | 0.326 | -0.751 | 0.415 | -1.170 | Cyprus | C_12 | -0.712 | -0.881 | -1.114 | -1.610 |
| Latvia | C_14 | -1.100 | -0.675 | -1.321 | -0.290 | Latvia | C_13 | -0.743 | -0.557 | -1.114 | 0.080 |
| Lithuania | C_15 | -0.419 | -0.386 | -0.570 | -0.586 | Lithuania | C_14 | -0.439 | -0.111 | -0.278 | 0.693 |
| Luxembourg | C_16 | 1.443 | 0.785 | 0.462 | -0.058 | Luxembourg | C_15 | -0.333 | -0.597 | -0.376 | -1.059 |
| Hungary | C_17 | -0.935 | -0.760 | -0.899 | -0.649 | Hungary | C_16 | -0.546 | -0.576 | -0.671 | -0.745 |
| Malta | C_18 | -0.484 | -0.782 | -0.242 | -1.008 | Malta | C_17 | -0.115 | -0.061 | -0.229 | -0.264 |
| Netherlands | - | - | - | - | - | Netherlands | C_18 | 0.086 | 0.008 | 1.541 | 1.042 |
| Austria | C_19 | 1.314 | 1.893 | 0.274 | 0.787 | Austria | C_19 | 0.624 | 0.244 | 0.656 | -0.153 |
| Poland | C_20 | -0.928 | -0.538 | -1.039 | -0.297 | Poland | C_20 | -0.585 | -0.554 | -0.671 | -0.477 |
| Portugal | C_21 | -0.355 | -0.027 | -0.383 | 0.076 | Portugal | C_21 | -0.554 | -0.630 | -0.278 | -0.527 |
| Romania | C_22 | -0.785 | -0.708 | -0.711 | -0.726 | Romania | C_22 | -0.487 | -0.667 | -0.475 | -1.028 |
| Slovenia | C_23 | -0.706 | -0.500 | -0.289 | 0.090 | Slovenia | C_23 | -0.376 | -0.436 | 0.312 | 0.019 |
| Slovakia | C_24 | -1.086 | -0.926 | -1.086 | -0.853 | Slovakia | C_24 | -0.514 | -0.337 | -0.376 | 0.232 |
| Finland | C_25 | -0.240 | -0.109 | 0.462 | 0.611 | Finland | C_25 | -0.700 | -0.019 | -1.065 | 1.629 |
| Sweden | C_26 | 1.579 | 1.075 | 2.432 | 1.687 | Sweden | C_26 | -0.467 | 0.248 | -0.327 | 1.999 |

Source: calculated by the authors

Based on the Euclidean distance values for each indicator describing the productivity of travel agency and tour

operator activities in Ukraine and EU countries, dendrograms were generated using Ward's method (Figs. 2-3).

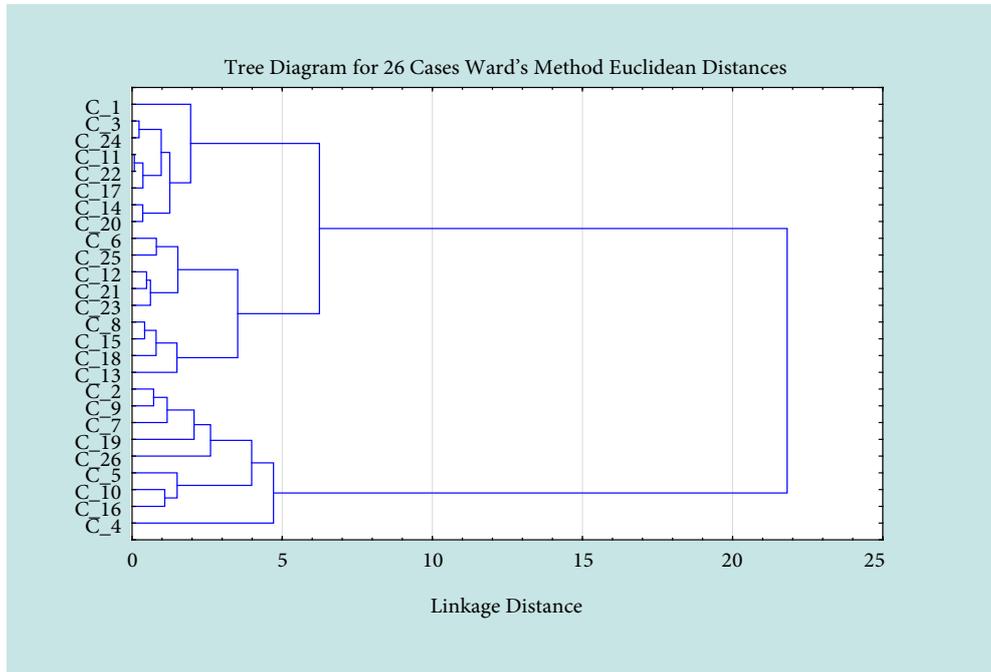


Figure 2. Dendrogram of the hierarchical grouping of Ukraine and EU countries using Ward's method based on indicators reflecting the productivity of travel agency activities, 2022
Source: constructed by the authors

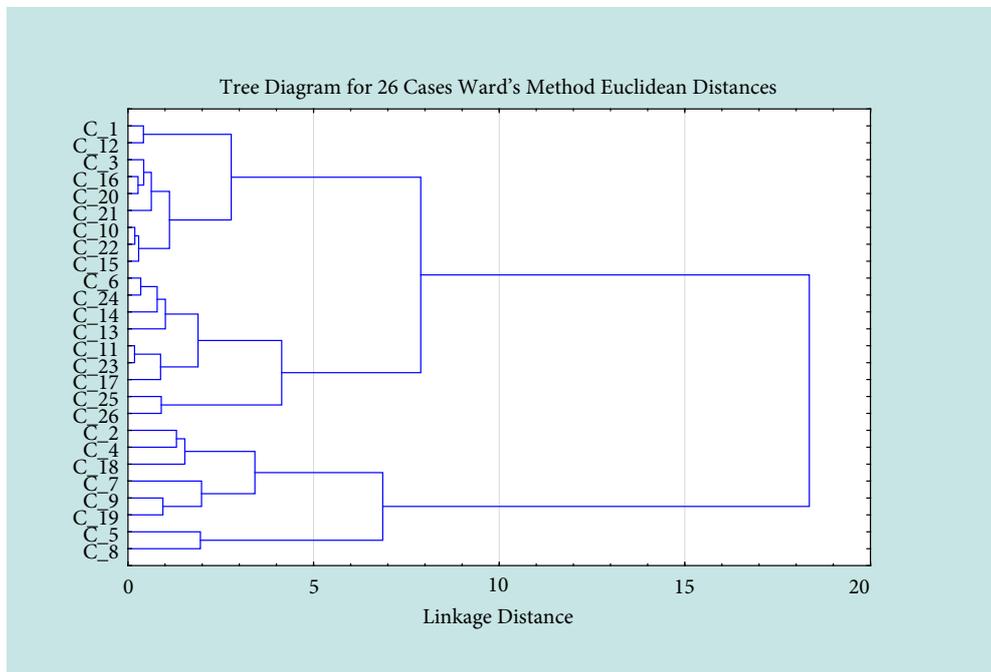


Figure 3. Dendrogram of the hierarchical grouping of Ukraine and EU countries using Ward's method based on indicators reflecting the productivity of tour operator activities, 2022
Source: constructed by the authors

Based on the results of the cluster analysis, three groups of countries can be identified according to the

productivity levels of travel agency (Table 4) and tour operator (Table 5) activities.

Table 4. Characteristics of country clusters by productivity level in travel agency activities

| Cluster number | Countries assigned to the cluster | Productivity level of travel agencies' activities | Cluster descriptions |
|----------------|--|---|--|
| 1 | Denmark, Luxembourg, France, Germany, Sweden, Austria, Ireland, Spain, Belgium | High | Countries with a well-developed tourism sector, and high value added and turnover per enterprise and employee in travel agency operations |
| 2 | Cyprus, Malta, Lithuania, Greece, Slovenia, Portugal, Italy, Finland, Estonia | Medium | Countries with a moderately developed but less productive travel agency sector compared to the leading group. These countries exhibit moderate income levels, stable tourism demand, and a significant presence of small enterprises |
| 3 | Poland, Latvia, Hungary, Romania, Croatia, Slovakia, Bulgaria, Ukraine | Low | Countries with low productivity in travel agency operations are reflected in limited value added and turnover indicators. The tourism sector is developing, but operational efficiency remains insufficient |

Source: compiled by the authors

Table 5. Characteristics of country clusters by productivity levels in tour operator activities

| Cluster number | Countries assigned to the cluster | Productivity level of tour operators' activities | Cluster descriptions |
|----------------|--|--|---|
| 1 | Germany, Spain, Belgium, Denmark, Netherlands, Ireland, France, Austria | High | Countries with high productivity in tour operator activities, characterised by substantial financial turnover and high value added |
| 2 | Sweden, Finland, Malta, Slovenia, Italy, Latvia, Lithuania, Slovakia, Estonia | Medium | Countries with moderate productivity in tour operator activities. The sector is stable but lags behind the leading group in terms of income levels and business scale |
| 3 | Luxembourg, Romania, Croatia, Portugal, Poland, Hungary, Bulgaria, Cyprus, Ukraine | Low | Countries with low productivity in tour operator activities are marked by modest financial indicators and limited resources |

Source: compiled by the authors

Thus, some countries exhibit high productivity levels across sectors (travel agencies and tour operators): Germany, Spain, Belgium, Denmark, France, Austria, and Ireland. This indicates overall efficiency in their tourism sectors, where both agencies and operators demonstrate strong financial performance, developed infrastructure, and government support. Scientific research has identified a positive correlation between cultural and historical heritage and the growth of heritage and cultural tourism, particularly in Italy, France, Spain, and Portugal. The findings indicate that an increase in the number of UNESCO World Heritage sites results in a 4% rise in tourist numbers (Kutlu *et al.*, 2024). The countries identified as having high productivity in tourism-related enterprises also possess a rich cultural heritage that attracts international visitors. For example, France is renowned for its museums, architecture, and historical landmarks such as the Eiffel Tower and the Louvre. Austria is celebrated for its musical heritage and architectural sites, as well as its well-developed infrastructure for winter sports and summer recreation, all of which enhance its appeal to tourists (Advantage Austria, n.d.). In these countries, the tour operator market is highly concentrated, which facilitates more efficient resource allocation and enables the provision of competitive tourism packages. For instance, the top five tour operators in France control half of the package tour market, while the ten largest companies account for 67% of

the total market. This concentration contributes to streamlining operations and reducing costs, thereby improving the overall productivity of the sector (Tarkang *et al.*, 2023; Sardi *et al.*, 2025). In addition, it is worth noting that the governments of these countries actively support the tourism industry through public funding and the implementation of strategic initiatives. For example, in Spain, tourism policy is coordinated by the State Secretariat for Trade, Tourism and Small Business, while the Spanish Tourism Institute Turespaña is tasked with promoting the country to international tourists. This centralised support structure contributes to the high performance of travel agencies and tour operators, enhancing their competitiveness in the international tourism market (Gunter *et al.*, 2024; Ion & Petre, 2024).

In contrast, countries such as Romania, Croatia, Poland, Hungary, Bulgaria, and Ukraine demonstrate low productivity in both categories, indicating a lack of efficiency in their tourism sectors. This may be attributed to smaller market sizes, lower tourist inflows, or underdeveloped infrastructure. The lowest productivity values are recorded in Ukraine, primarily due to the impact of the ongoing war following the Russian invasion. Academic literature highlights the consequences of the Russian-Ukrainian war, including widespread civilian casualties, infrastructure damage, and economic instability, all of which significantly undermine the country's appeal as a tourist destination

and impair the functioning of its tourism industry (Kozłowski, 2023; Olshanska *et al.*, 2023). Other studies confirm profound changes in the structure and operation of Ukraine's tourism system as a result of the prolonged conflict (Tomej & Bilynets, 2024).

Countries exhibit varying productivity levels across different categories, such as Luxembourg (which demonstrates high productivity in travel agency activities but low productivity in tour operator operations), Sweden (which shows high productivity in travel agency activities but moderate productivity in tour operator operations), and Portugal (which displays moderate productivity in travel agency activities but low productivity in tour operator operations). It is noteworthy that some European countries may have limited capacity to provide financial subsidies to tour operators, as governments may prioritise budget allocations to other sectors such as infrastructure, education, or healthcare. In addition, state aid within the EU is regulated by stringent rules designed to prevent unfair competition. Research findings by T. Malatinec (2024) indicate that France and Spain are among the leading countries actively utilising officially reported state aid, whereas Luxembourg and Portugal have not employed such support within the tourism sector. This may be attributed to Luxembourg's lack of dependence on tourism, given its small tourism sector and a national economic focus on financial services. Portugal, meanwhile, places greater emphasis on private

investment and alternative mechanisms for promoting tourism – such as European grants – rather than direct state aid. The absence of reliable statistical data and the limited scale of Luxembourg's tourism market represent significant constraints for research (Astike *et al.*, 2024).

Thus, most countries demonstrate consistent productivity levels across both categories, reflecting a stable level of development in the tourism market. However, in certain cases, discrepancies between the productivity of travel agencies and tour operators may arise due to specific market conditions, differing business models, or the underlying economic structure of the tourism sector (for instance, the more prominent role of independent travel agencies versus largescale tour operators). To determine whether travel agencies and tour operators are more strategically oriented towards domestic or international tourism, a suitable metric may be employed – namely, the ratio of organised domestic to international tourism trips. This indicator enables an assessment of national tourism priorities: a higher number of international trips relative to domestic ones suggests a stronger orientation towards international tourism; conversely, a predominance of domestic travel indicates a focus on promoting internal tourism, often supported by public institutions and industry stakeholders. Based on this ratio, two categories of countries can be identified: those in which international tourism predominates and those where domestic tourism is more significant (Table 6).

Table 6. Indicators of the number of international and domestic tourism trips in EU countries, 2022

| Country | Number of international tourism trips | Number of domestic tourism trips | Total number of tourism trips | Share of international tourism trips (%) | Share of domestic tourism trips (%) |
|-------------|---------------------------------------|----------------------------------|-------------------------------|--|-------------------------------------|
| Belgium | 13,498,234 | 4,622,248 | 18,120,482 | 74 | 26 |
| Bulgaria | 879,455 | 3,434,713 | 4,314,168 | 20 | 80 |
| Czechia | 6,826,441 | 26,148,995 | 32,975,436 | 21 | 79 |
| Denmark | 6,043,213 | 12,156,442 | 18,199,655 | 33 | 67 |
| Germany | 86,623,140 | 135,068,582 | 221,691,722 | 39 | 61 |
| Estonia | 1,119,496 | 2,639,870 | 3,759,366 | 30 | 70 |
| Ireland | 7,460,294 | 10,517,093 | 17,977,387 | 41 | 59 |
| Greece | 939,366 | 5,990,073 | 6,929,439 | 14 | 86 |
| Spain | 13,588,870 | 124,602,722 | 138,191,592 | 10 | 90 |
| France | 26,790,132 | 202,475,552 | 229,265,684 | 12 | 88 |
| Croatia | 1,351,328 | 3,148,238 | 4,499,566 | 30 | 70 |
| Italy | 9,330,779 | 38,008,674 | 47,339,453 | 20 | 80 |
| Cyprus | 1,234,615 | 1,689,154 | 2,923,769 | 42 | 58 |
| Latvia | 1,303,207 | 2,828,190 | 4,131,397 | 32 | 68 |
| Lithuania | 1,919,427 | 3,595,009 | 5,514,436 | 35 | 65 |
| Luxembourg | 2,818,099 | 165,180 | 2,983,279 | 94 | 6 |
| Hungary | 5,516,318 | 10,612,325 | 16,128,643 | 34 | 66 |
| Malta | 568,160 | 369,000 | 937,160 | 61 | 39 |
| Netherlands | 23,145,692 | 21,489,855 | 44,635,547 | 52 | 48 |
| Austria | 14,040,577 | 14,652,513 | 2,869,3090 | 49 | 51 |

Table 6. Continued

| Country | Number of international tourism trips | Number of domestic tourism trips | Total number of tourism trips | Share of international tourism trips (%) | Share of domestic tourism trips (%) |
|----------|---------------------------------------|----------------------------------|-------------------------------|--|-------------------------------------|
| Poland | 11,741,604 | 51,701,833 | 63,443,437 | 19 | 81 |
| Portugal | 2,248,981 | 16,765,837 | 19,014,818 | 12 | 88 |
| Romania | 1,475,106 | 16,820,104 | 18,295,210 | 8 | 92 |
| Slovenia | 3,160,974 | 2,772,562 | 5,933,536 | 53 | 47 |
| Slovakia | 3,302,534 | 7,142,078 | 10,444,612 | 32 | 68 |
| Finland | 6,190,196 | 27,103,670 | 33,293,866 | 19 | 81 |
| Sweden | 15,268,834 | 62,400,828 | 77,669,662 | 20 | 80 |

Source: compiled and calculated by the authors based on Eurostat (2025b)

By comparing the productivity levels of tourism enterprises with the orientation of tourism flows, clusters of EU countries may be identified based on the similarity of their performance in organising heritage and cultural tourism

trips (Table 7). The results of grouping EU countries using the proposed matrix – which takes into account the distribution of tourism enterprises into travel agencies and tour operators – are presented in Tables 8 and 9.

Table 7. Interpretation of the matrix for grouping EU countries by the productivity level of tourism enterprises in the organisation of heritage and cultural tourism trips

| Predominance of the share of tourism trips in a given direction | International tourism | Citizens travel abroad independently; the activities of tourism enterprises are inefficient | Tourism enterprises are partially involved in organising international trips | High level of international tourism organisation through tourism enterprises |
|---|-----------------------|---|---|--|
| | Domestic tourism | Tourists travel without using organised services; the market for package trips is weak | Tourist enterprises are moderately active; domestic trips are partially organised | High level of domestic tourism organisation through tourism enterprises |
| | | <i>Low</i> | <i>Medium</i> | <i>High</i> |
| Productivity level of tourism enterprises' activities | | | | |

Source: proposed by the authors

Table 8. Matrix grouping of EU countries by the productivity level of travel agencies in the organisation of heritage and cultural tourism trips

| Prevalence of the share of tourism trips in the direction | International tourism | – | Malta Slovenia | Belgium Luxembourg |
|---|-----------------------|---|--|---|
| | Domestic tourism | Poland Latvia Hungary Romania Croatia Slovakia Bulgaria | Cyprus Lithuania Greece Portugal Italy Finland Estonia | Denmark France Germany Sweden Austria Ireland Spain |
| | | <i>Low</i> | <i>Medium</i> | <i>High</i> |
| Productivity level of travel agency activities | | | | |

Source: compiled by the authors

Table 9. Matrix grouping of EU countries by the productivity level of tour operators in the organisation of heritage and cultural tourism trips

| Prevalence of the share of tourism trips in the direction | International tourism | Luxembourg | Malta Slovenia | Belgium Netherlands |
|---|-----------------------|---|--|---|
| | Domestic tourism | Romania Croatia Portugal Poland Hungary Bulgaria Cyprus | Sweden Finland Italy Latvia Lithuania Slovakia Estonia | Germany Spain Denmark Ireland France Austria |
| | | <i>Low</i> | <i>Medium</i> | <i>High</i> |
| Productivity level of tour operator activities | | | | |

Source: compiled by the authors

Based on the grouping results of EU countries, it can be concluded that domestic tourism is a key driver of high productivity for travel agencies and tour operators in leading EU states. As a result of the COVID-19 pandemic, domestic tourism has become significantly more important across the European Union. Restrictions on international travel, quarantine measures, and safety concerns prompted many Europeans to holiday within their own countries. Domestic tourism has therefore become a vital part of the economy, supporting local tourism businesses and reducing reliance on foreign visitors. Countries such as Germany, France, Italy, and Spain have actively fostered domestic tourism through investment in promotion, infrastructure, and the development of new destinations (Falk *et al.*, 2022). The situation in Ukraine is even more critical. In addition to the pandemic, the country continues to face the devastating effects of war. The war with Russia has caused a sharp decline in international tourism while simultaneously increasing interest in domestic travel, driven by security concerns and restrictions on leaving the country (Shpak *et al.*, 2023). The proposed matrix offers a tool for evaluating the effectiveness of travel agencies and tour operators in organising both domestic and international tourism. This distinction provides insight into which countries are more dependent on domestic tourism and which rely more heavily on international flows.

CONCLUSIONS

As a result of the study, EU countries were clustered based on the productivity levels of travel agencies and tour operators. The analysis identified three main groups: high, medium, and low productivity. Countries with high productivity in both categories (Germany, Spain, Belgium, Denmark, France, Austria, Ireland, etc.) are characterised by high value added per enterprise and employee, a significant share of international tourism, and well-developed tourism infrastructure. High productivity is associated with the adoption of modern technologies, effective business models, and substantial investment in the industry. Countries with medium productivity (Italy, Finland, Lithuania, Greece, Portugal, etc.) possess a developed tourism sector but lag behind the leading nations due to less efficient resource allocation, limited investment, and lower levels of infrastructure development. Countries with low productivity (Romania, Croatia, Poland, Hungary, Bulgaria, etc.) demonstrate inefficiencies in the operation of the

tourism sector. This may be attributed to a limited market, lower tourist numbers, or underdeveloped infrastructure. The situation in Ukraine was analysed separately and was found to correspond with the group of lowproductivity countries in terms of travel agencies and tour operators.

Most countries exhibit stable productivity across both categories, reflecting a consistent level of tourism market development. However, some countries reveal discrepancies between the productivity levels of travel agencies and tour operators, which may be explained by market characteristics, business strategies, or differing tourism models (e.g., a more prominent role for individual agencies over large-scale operators). A matrix-based method was proposed to determine the focus of travel agencies and tour operators on either domestic or international tourism and to assess their effectiveness in these areas. This approach enabled the classification of EU countries according to the productivity of their tourism enterprises in the organisation of heritage and cultural tourism trips for both international and domestic markets. Based on the results, it was concluded that domestic tourism constitutes a key factor in the high productivity of tourism enterprises in the leading EU countries. Future research should focus on developing practical recommendations to enhance the efficiency of tourism enterprises, respond to modern challenges, and integrate new technologies to strengthen the tourism sector's competitiveness.

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Співпраця між туристичними агентами та туристичними операторами у сфері організації історико-культурних туристичних поїздок у країнах Європейського Союзу

Анотація. Метою дослідження було формування кластерної структури ринку та визначення тенденцій розвитку туристичної сфери на основі оцінювання продуктивності діяльності туристичних агентів і туристичних операторів у країнах Європейського Союзу та Україні у сфері організації історико-культурних міжнародних та внутрішніх туристичних поїздок. Для аналізу використано комплекс методів, зокрема кластерний аналіз, статистичні методи, стандартизацію даних, матричний метод, порівняльний аналіз. Для оцінювання продуктивності діяльності туристичних компаній розраховано такі показники, як додану вартість на одне підприємство, оборот на одне підприємство, додану вартість на одного працівника та оборот на одного працівника. Застосування ієрархічної кластеризації дозволило розділити країни на три групи за рівнем продуктивності діяльності туристичних агентів та туристичних операторів: високий, середній і низький. Україну віднесено до групи з низькою продуктивністю діяльності як туристичних агентів, так і туристичних операторів. Виявлено, що більшість країн ЄС демонструють стабільну продуктивність діяльності обох категорій туристичних компаній, що вказує на узгоджений рівень розвитку туристичного ринку. Проте деякі країни мають розбіжності між рівнем продуктивності діяльності туристичних агентів та туристичних операторів, що пояснюється особливостями ринку, стратегіями бізнесу та економічною моделлю туризму. Для виявлення напряму фокусу туристичних агентів та туристичних операторів на організацію внутрішніх чи міжнародних туристичних поїздок, а також визначення ефективності їх роботи на цих напрямках, запропоновано скористатись показником, який відображає співвідношення кількості організованих внутрішніх та міжнародних туристичних поїздок. Матричним методом за допомогою співставлення рівня продуктивності діяльності туристичних підприємств з напрямом орієнтації туристичних поїздок, сформовано кластери країн ЄС за подібністю продуктивності їх діяльності у сфері організації історико-культурних туристичних поїздок. За результатами групування країн ЄС зроблено висновок, що внутрішній туризм є ключовим чинником високої продуктивності діяльності туристичних компаній у провідних країнах ЄС. Результати дослідження можуть бути використані для розроблення стратегій підвищення ефективності діяльності туристичних підприємств, зокрема шляхом оптимізації бізнес-моделей, залучення іноземних туристів та організації внутрішніх туристичних поїздок

Ключові слова: туристичне підприємство; історико-культурна спадщина; ефективність; продуктивність; туристичний ринок; міжнародний та внутрішній туризм