Chapter 16

# Why Cluster? Text and Sub-text in the Engagement of Tourism Development Policies with the Cluster Concept

Adi Weidenfeld, Allan M. Williams and Richard W. Butler

## Introduction

Economic policies in advanced capitalist economies are increasingly engaging with clusters as a strategy for increasing competitiveness (Novelli, Schmitz and Spencer 2006). As a concept, clustering, as applied in economic and industrial policies, has passed from the status of innovative theorisation, through the stage of fashionability to late maturity and critical reflection (Maskell and Malmberg 2007). But the application of clusters in the tourism sector has come late in these policy discourses. This chapter explores engagement with and resistance to the concept of clusters within tourism policy and practice, drawing on a case study of tourism attraction clusters and policy making in Cornwall, England.

This chapter tells the story of how the opaqueness of tourism clusters has contributed to contested meanings, to the difficulties of embodying the cluster concept in policies, and in implementing notions of clusters via development approval processes. The interpretation and implementation of tourism clusters is influenced by two factors: the formal manifestation of 'clusters' as in written policy and the 'informal' way in which the notion of 'clusters' is given meaning in policies and operationalised in practice; this is what we term the difference between 'text' and 'sub text'.

An examination of issues related to translating the cluster concept from theory into practice reveals different approaches to understanding tourism planning and policy making. Sustained commitment to neoliberal policy directions emerged in competing forms in the more developed economies at different times from the late 1970s and the 1980s (The introduction of the Book). In essence this involved a rolling back of the frontiers of the state, through deregulation and public sector cut backs, so that private capital took a leading role in driving economic development (Hudson and Williams 1999). This is the context in which the emergence of tourism clusters is seen as deliberate or accidental, with winners and losers. The cluster concept draws on a critical, social constructionist approach, which refers to the product of human choices (bottom-up), rather than dictated by laws and regulations. It helps to explain the complexities of tourism planning and policy making, especially under neoliberalism.

However, there remain significant gaps between the rhetoric and reality of neoliberalism. Governments have demonstrated uneven involvement in and support of tourism, making it difficult to make generalised claims about the influence of neoliberal management on tourism. However, in many developed economies, tourism is one policy area that has generally been characterised by a decline in direct government involvement and increased adoption of facilitator and/or enabler roles. At the same time, governments have encouraged industry to develop clusters and networks as a means of improving market competitiveness, awareness and strength. This approach has been woven into formal and informal policies, but there has also been an increasing reflexivity amongst the key actors. That is, stakeholders have increased flexibility to interpret and give meaning to various policies.

This chapter explores how these contradictory forces play out in the decisions and actions of the actors and agencies involved, and in the structures and practices of tourism planning and policy making. The chapter provides an opportunity to examine how cluster theory has been translated and given meaning in tourism, and it enhances our understanding of the challenges of translating clustering policies into practice. This chapter focuses on the relatively understudied attraction sector in two tourism clusters in Cornwall with low and high levels of agglomeration of visitor attractions respectively. In doing so, it explores differences in how clusters have evolved, and how tourism stakeholders engage with cluster development.

The chapter begins by exploring the literature on the cluster concept and clustering policies in tourism, followed by the methodology and a critical review of current tourism development policies in the study areas. It then explores the engagement with the cluster concept amongst tourism stakeholders and how this is understood and operationalised by attraction operators. The next section continues through individual 'stories' reflecting the ways policies are implemented and shape tourism clusters. The case study provides an insight into the reasons for the locations of some of the visitor attractions in the study areas and illustrates the nature of the planning decision making processes in the context of spatial clustering in theory and practice. This exploration also reveals how formal and informal policies, related to clustering, including cooperation, competition and enhancing knowledge transfer and diffusion of innovations between tourism firms, influence the development planning process, which we refer to as the text and sub-text of our story about clusters and tourism policies in Cornwall.

## Tourism Clusters: From Theory into Practice

The spatial cluster model has been applied predominantly to manufacturing industries such as automotive engineering rather than to services or to tourism in particular. However, it is increasingly being applied to tourism. In this chapter we adopt Jackson and Murphy's (2006) cluster approach, which sees the outcome of agglomeration of tourism businesses in a tourism space as an industrial cluster (Porter 1990, 1998). According to Porter (1990 cited in Ketels 2003: 3–4) 'clusters are groups of companies and institutions co-located in a specific geographic region linked by interdependencies in providing a related group of products and/or services'. Due to geographic proximity, cluster constituents are said to enjoy the economic benefits of several types of positive and location-specific externalities (Ketels 2003) endowing them with competitive advantages (Nordin 2003). Based on Porter's (1998) cluster theory and its applicability to tourism (Cracolici and Nijkamp 2006, Vanhove 2006, 2002, Nordin 2003), competitiveness in tourism clusters is understood to be determined by three key issues: (1) factor and demand conditions; (2) the context for firms' strategies and rivalries; and (3) related and supporting industries. Adapting this model to the tourism industry with issues related to each of these aspects is illustrated in Figure 16.1 as detailed below.

Factor conditions refer to a destination's relative competitive position in terms of cultural, physical, environmental, economic conditions and motivational factors to attract visitors. Demand conditions refer to the nature of tourism demand

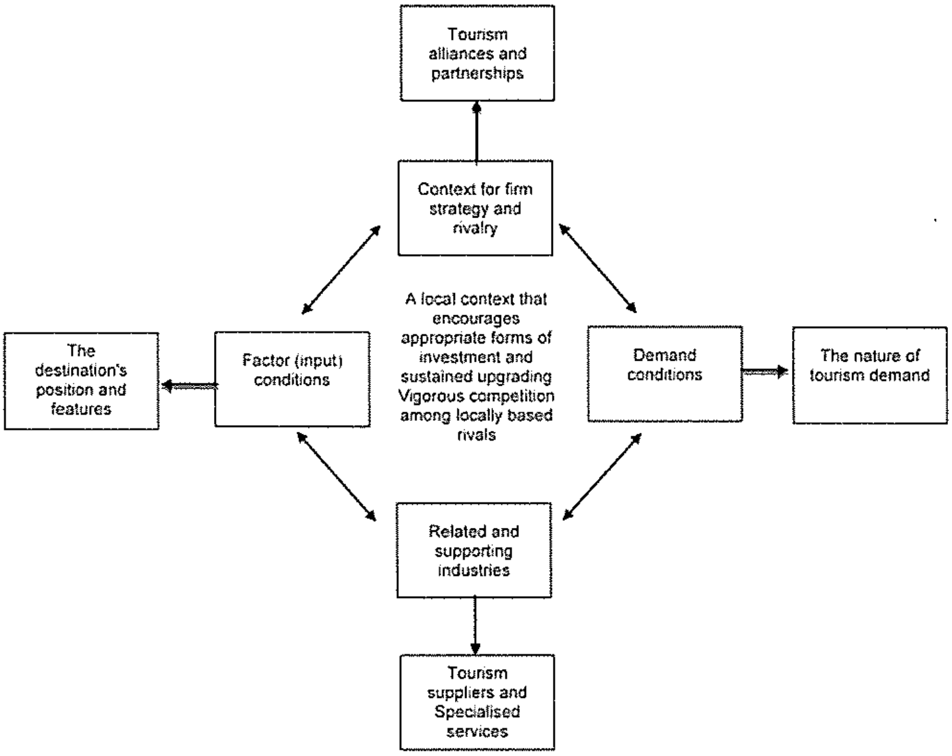


**Figure 16.1 Porter's Diamond Model and its applicability to tourism**
*Source*: Adapted from Jackson (2006: 699)

for products and services, including tastes and requirements of tourists visiting a destination, and the context for firm's strategies and rivalries that improve the competitive standing of a tourism destination, including mechanisms such as private partnerships and alliances. Related and supporting industries refer to the presence or absence of actors providing cluster members with custom-made high quality inputs, components and specialised services e.g. providers of hotel and restaurants food, good personnel training schools, engineers, and technicians that define a tourism area's competitive position.

The co-location of firms does not guarantee clustering. That is, attractions located in proximity to each other do not automatically enjoy reductions in the average costs to member firms nor do they enjoy economies of-scale and of-scope (Michael 2007). However, co-location is relevant when considering tourism clusters (Jackson and Murphy 2006), especially where the synergetic relationships of production are comprised of a few sub-products (economies of scope), with each contributing to production of the overall tourism product (Michael 2007). The co-location of restaurants, retail outlets and other services can engender the development of synergetic relationships. For example, a major theme park may sell one ticket that includes entrance fee, a meal in a local restaurant, transport to/from a hotel, and special discounts for buying souvenirs in local shops.

But the definition of a tourism cluster is necessarily contested; it can be used to describe a destination as an array of linked, synergetic products and services or it might denote entities located in close proximity but in competition. While recognising that clusters also stimulate complementarity, the co-location of complementary firms does not guarantee generation of synergies or cost efficiencies amongst them, which can be a result of employing cluster mechanisms (Weidenfeld, Butler and Williams 2009). Cooperation between neighbouring attractions, particularly in marketing (Fyall, Leask and Garrod 2001), results in economies of scale, while there are also issues relating to minimising transportation costs and distance for visitors in terms of mobility between visitor attractions (agglomeration economies).

The 'cluster' concept has been increasingly used and recognised in recent years as an essential element in regional economic development strategies (Burfitt and McNeill 2008, Hall 2004, Leibovitz 2004). Ketels (2003) notes that although cluster theories do not necessarily provide specific guidance for the construction of economic development strategies, they have variously informed, or at least been used to label numerous policies and industry initiatives underpinned by spatial concentration. Although there is little evidence that policy interventions can speed cluster development or increase the effectiveness of existing ones, clusters are increasingly popular with regional development agencies in most European countries (Novelli et al. 2006).

Alongside policy discourses that advocate the role of clusters, there are also counter discourses. Burfitt and McNeill (2008) question the extent to which evidence shows that clusters raise productivity, profitability and innovation, and whether the design of policy initiatives are effective and well targeted. Not surprisingly, there is also considerable debate about the implications of cluster initiatives and their outcomes in various aspects of their objectives, geographical scale, level of government intervention, approach (e.g. top down versus bottom up) and scale of financial intervention (Burfitt and McNeill 2008). Furthermore, the cluster concept is continuously redefined by stakeholders' interests, which are often marginalised in networking and clustering strategies (Dredge 2006). Therefore, taking a more localised approach to policy actions is needed.

Cluster theory has been criticised for having little resemblance to industrial clusters in the 'real world', for being superficial, and for lacking both universality and specificity (Michael 2007, Leibovitz 2004, Novelli et al. 2006). It is also criticised as being complex, vague and poorly defined, particularly in terms of the difficulties in delimiting a cluster geographically. However, '... not all the arguments underlying clusters are compatible with each other ...' (Newlands 2003: 527). Sometimes the arguments are contradictory, for example, spatial proximity engenders building trust and strong personal relationships between actors but also leaves labour open to poaching and allowing benefits to be easily externalized. In the latter example, agglomeration economies may actually represent a deterrent to investment in the strengthening of social networks and trust (Newlands 2003). Spatial clusters do not guarantee the automatic emergence of positive economic and development benefits (Raco 1999). Spatial clustering may even impede development and progress through mutually reinforcing local or regional routines. These can include long-term agreements and embedding traditional conventions amongst cluster members, which inhibit technological advancement and innovations (Newlands 2003) and lock in an adherence to conventional ideas with less openness to innovations (Boschma 2005). Supporting structures and policy interventions can contribute significantly to the failure or success of clusters (Nordin 2003). However, '... clusters are to some extent accidents of history, reflecting the impact of past choices ... rather than a sensible planning outcome, but their development is also influenced by the appearance and growth of reinforcing institutions' (Newlands 2003: 525).

Tourism clusters, in the context of industrial groupings, reveal significant variations in the composition of economic relations between firms in the public policies to which they are subject, in the nature of demand and supply and the ongoing processes of change. Change can occur as a result of agglomeration processes, such as development of new firms, which increases their density and influences the levels of competitive and collaborative relationships amongst them. Nordin (2003) suggests that government interventions or frameworks need to be tailored to local circumstances. The following three aspects are identified in the literature as key issues in cluster processes and policies (Figure 16.2): (1) forming networks and collaboration (e.g. Hall, Lynch, Michael and Mitchell 2007); (2) balancing cooperation and competition; and (3) facilitating knowledge transfer and innovations (Michael 2007). These issues emanate from the cluster concept and underlie setting up policy guidelines. Although these issues are separately discussed in this chapter, we acknowledge that they may be interrelated and overlap.

*Forming Networks and Collaboration*

Networks provide '... the social oil that allows the economic engine of a cluster formation to operate' (Hall et al. 2007: 144). In practice, regional and local policy-makers focus on supporting public-private collaborations and promoting collective learning processes, including the encouragement of networks and partnerships between large companies, Small and Medium-sized Enterprises (SMEs), trade associations, universities and research institutes, further education colleges, training providers and promotional and economic development agencies (Jackson 2006). There are, however, multiple ways to translate Porter's (1991, 1998) cluster concept into close associations between firm networking and public-private partnerships, including a 'top-down' approach, a 'bottom-up' approach as well as '... initiatives ranging from policies for supporting small-scale business networks without a particular sectoral focus to large-scale programmes targeting a specific, geographically limited industry' (Hallencreutz and Lundequist 2003: 536).

*Balancing Cooperation and Competition*

The balance between competition and cooperation within clusters is an important determinant of the direction of public policy, especially the balance between the tendency to cluster to create economies of scale. Competition between potential clustering firms, rather than a cooperative business environment, might lead new entrants to try to capture the benefit of externalities for themselves. Such conditions will benefit the initiating firms, but may deter complementary entrants from joining the cluster, hindering its regional growth (Michael 2007). Instead, co-opetition (cooperative competition) should guide tourism cluster firms to compete more effectively with those outside the cluster (Buhalis 2006, Michael 2007) while benefiting from the cluster's externalities (Michael 2007).

*Enhancing Innovation Mechanisms*

Encouraging co-opetition in tourism while maintaining a viable competitive environment is interrelated to facilitating knowledge transfer and diffusion of innovations amongst tourism enterprises (Figure 16.2). Co-opetition is essential for the innovations that drive renewal or replacement of existing economic structures. Innovations are the essential motor of growth of market economies, but this often requires state interventions, for example to speed up the restructuring of small businesses (Keller 2006). Tourism clusters are considered a fertile 'breeding' ground for innovation, particularly if the clusters are characterised by Unique Selling Prepositions (USPs), which endow them with competitive advantage that distinguishes and differentiates them from other clusters. However, clusters in general, including tourism clusters with USPs often lack a solid grounding in research and development and practices to 'automate' and make innovation a

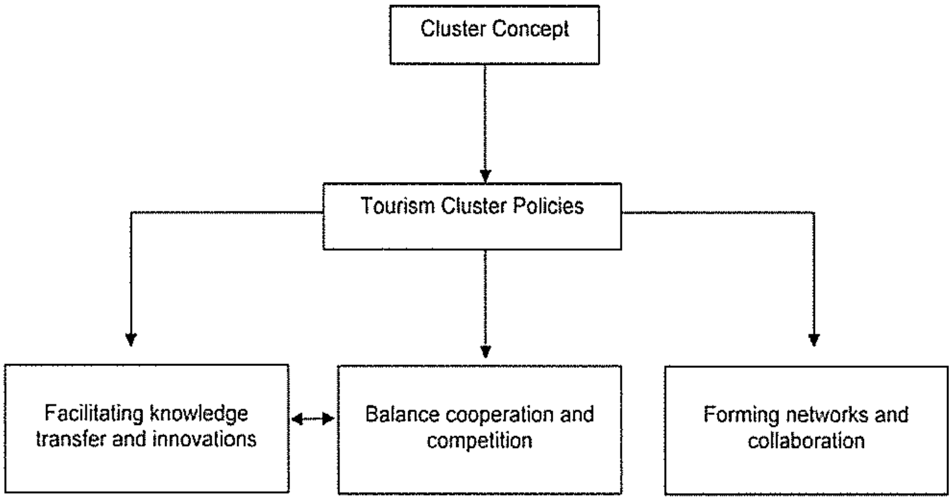


**Figure 16.2 Tourism cluster policies**

matter of routine. In these circumstances, the state can intervene to disseminate knowledge about clusters, promote research and development and train labour (Keller 2006).

## Research Approach

In the following section, the case study context, research approach and methods are outlined. Given that a key focus of the research was to explore differences between the conceptualisation and in-situ meaning of clusters, a comparative case study was considered the ideal approach. The attraction sector was selected for this study because it is relatively under-researched and is a key component of the tourism experience product (e.g. Fyall, Leask and Garrod 2002, Watson and McCracken 2002, Middleton and Clarke 2001, Swarbrooke 2001). Given that the relationships between different levels of spatial concentration between tourism businesses can explain the concept and meanings of tourism clusters, it was decided to study two contrasting clusters (in terms of levels of density of tourism businesses) in England, where cluster policy has been developed and delivered primarily at the regional level (Burfitt and McNeill 2008).

### *Case Study Context*

The Newquay and the Lizard Peninsula are broadly similar in size (c.230 square kilometres) and are situated within Cornwall in the South West of England (Figure 16.3). They were selected because their economic structures and spatial

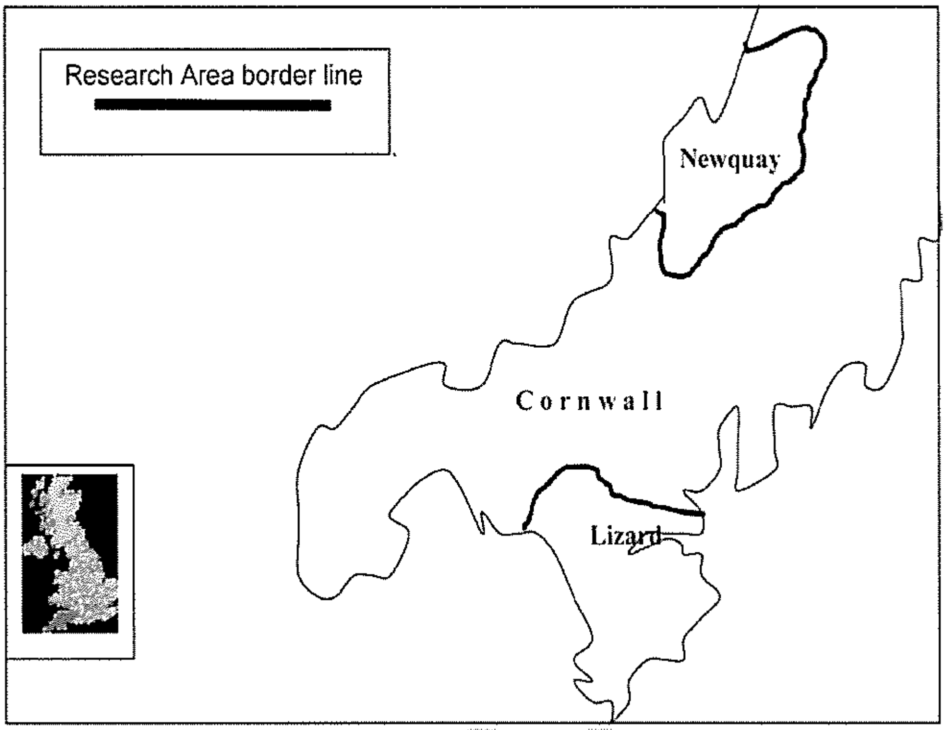


**Figure 16.3 The boundaries of the research areas Newquay and the Lizard Peninsula**

densities (i.e. conditions for spatial proximity) potentially offer two contrasting understandings of clusters and tourism policies.

The Lizard Peninsula is dominated by a large area of central moorland, incised wooded valleys and a coastal environment of coves, beaches and cliffs. Lizard Point is a geographical feature of national significance being the southernmost point in Britain (Kerrier District Council 2002). Its main attractions are its relatively undeveloped coast and a mix of attractions (heritage and garden attractions and a theme/fun park). In contrast, the Newquay area contains a higher number of tourist attractions at a higher density than 'the Lizard' (Table 16.1). The average minimum travel distance and time by road between any two of attractions is significantly shorter in Newquay (20 minutes and 7.1 miles) than on the Lizard (37 minutes, 9.33 miles) (based on Automobile Association data 2008[1]). The Newquay cluster also has better accessibility to private and public transport than the Lizard Peninsula. Newquay brands itself as the capital of water sports and surfing; its main attractions include beaches, and rural and maritime landscapes (Restormel Borough Council 2005).

---

1 The Automobile Association ('AA'). Available at: www.theaa.com (accessed: 2 January 2008).

**Table 16.1 Tourism attributes of attractions in Newquay area and the Lizard Peninsula**

| **Tourism Attribute** | **Newquay area** | | | | | | **The Lizard Peninsula** | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Number of visitor attractions | 13 | | | | | | 10 | | | | | |
| Product type | Ad | Am | G | H | T | W | Ad | Am | G | H | T | W |
| Number | 2 | 4 | 0 | 1 | 0 | 6 | 0 | 3 | 4 | 2 | 2 | 1 |
| Density between attractions | 20 minutes, 7.1 miles | | | | | | 37 minutes, 9.33 miles | | | | | |

*Note*:
Ad – Adventure (e.g. beach activities)
Am – Amusement (e.g. fun/theme park)
G – Gardens
H – Heritage (e.g. museum)
T –Thematic (technological display)
W – Wildlife

### *Data Collection*

The case study adopted a mixed method approach including the collection of background published data and semi-structured interviews with nine policy-makers (e.g. public officials, councillors, local tourism organisation representatives) and 23 tourism attraction operators. Consistent with previous studies (Hajdaš Dončić, Horvat, and Smid 2007, Novelli et al. 2006, Jackson 2006, Jackson and Murphy 2006), evidence from primary and secondary data sources (e.g. tourism association websites, tourism leaflets, advertisements, guidebooks and interviews with nine key informants) provided the data for selecting the clusters, and for delineating their boundaries. Stories of how stakeholders engaged with the concept of clustering were obtained through in-depth interviews. A sample of nine key informants was selected including representatives of local tourism organisations and local government bodies, such as regional development agencies, local and regional authorities, which either directly or indirectly influence tourism and the development and implementation of tourism policies in the study areas. The sample included two regional/local tourism-planning officers, two councillors, two heads of tourism associations, and three tourism professionals, who were influential figures in the Cornish tourism industry.

Participants were selected based on their position, expertise, and knowledge, which was more targeted and appropriate than sampling techniques. A snowball sampling procedure was also implemented by asking the initial respondents to suggest potential councillors and policy makers, who are associated with tourism, to be interviewed (Brunt 1997, Finn, Elliot-White and Walton 2000, Berg 2007). All key informants agreed to participate in the research, although an interview with one councillor had to be substituted with another after the subject acknowledged a lack of involvement in tourism development policies. Informants were asked to define a tourism cluster, to determine its size, and discuss whether they considered this had meaning to an attraction operator. The interviews explored how popular and meaningful the term 'cluster' was for key informants and attraction managers;

whether and how tourism policies and guidelines were influenced by the idea of clustering; and whether locational decision making was influenced by aspects of clustering including cooperation, competition and knowledge transfer between attractions.

In addition, 23 attraction managers were interviewed to develop understandings about the reasons for the locations of their attractions, the nature of relationships between other attractions in terms of spatial proximity, thematic similarity and cluster dimensions (e.g. cooperation, competition and knowledge transfer). Interviews in the two tourism clusters were undertaken between February and October 2006. The duration of the interviews was between 45 minutes to 90 minutes.

For the purpose of this study, a business was considered to be a tourism attraction if it was a permanently established excursion destination that charged admission for the purpose of sightseeing and attracted mostly tourists (non-residents), or allowed access for entertainment, interest, or education, rather than being *primarily* a retail outlet or a venue for theatrical, film or sporting performances (StarUK 2008). Public, private and voluntary sector attractions were included as long as they charged entrance fees. SMEs, were taken to be businesses with between ten to 499 employees (Shaw 2004). All attractions in Newquay and the Lizard matched the definition of SMEs and were included in the study, and the only exclusions were on the grounds of the precise nature of the business (e.g. a tourist shop presenting itself as an attraction). Each of the ten attraction managers in the Lizard cluster agreed to be interviewed. In the Newquay cluster, three attractions did not agree to be interviewed, resulting in a sample of 13 out of 16 attractions. All interviews were taped and all relevant sections transcribed, and subjects were asked to give permission for direct quotation in any publications resulting from the study. Interviews were transcribed and analysed for content and meaning (e.g. see Ritchie and Spencer 1994,Waitt 2003).

## Tourism Policies in Cornwall, Newquay and the Lizard

The aim of this research, as previously stated, was to examine whether tourism-planning policies address tourism cluster issues (e.g. cooperation, competition, and knowledge transfer between attractions). A secondary objective was to explore whether the cluster concept has had, or could have, a role in shaping tourism policies and in influencing the operation of tourist attractions. In reporting the findings, we begin with a review of development and planning policies for the sub-region of Cornwall in South West England (SWT 2002 and SWRDA 2005, Cornwall County Council 2003, 2004, 2005), and those of the local governments to which the territories of Newquay and the Lizard belong (Kerrier District Council 2002, 2005a, 2005b, Restormel Borough Council 2001, 2004, Wright 2000, 2003). Regional and sub-regional tourism planning policies are addressed by both Cornwall County Council and regional agencies, such as the South West

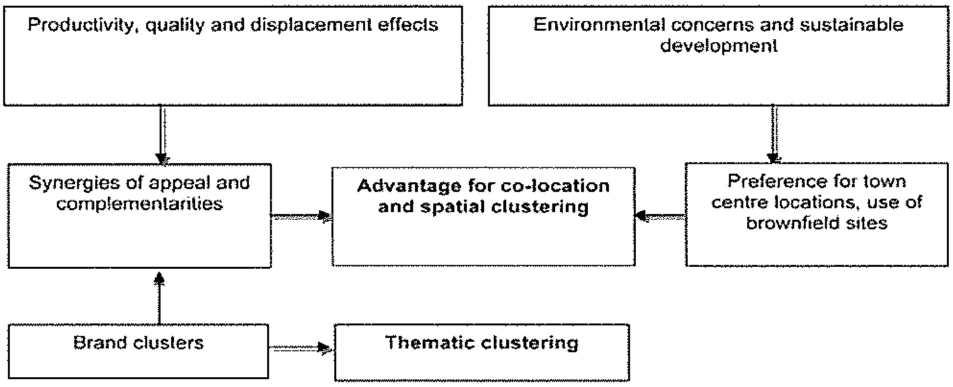


**Figure 16.4 Spatial and thematic clustering policy aspects of tourism policies in Newquay and the Lizard Peninsula**

Regional Development Agency (SWRDA) and its executive board, South West Tourism (SWT). The latter two are the main regional agencies responsible for tourism in the South West of England, influencing tourism development planning at both regional and the local scales. The review of planning policies reveal three main aspects of clusters (1) environmental concerns and sustainable development; (2) productivity, quality and displacement effects; and (3) thematic diversity and clustering (Figure 16.4).

Preference for town centre locations and use of brownfield sites (i.e. previously developed land) are influenced by environmental concerns, and sustainable development and productivity, quality and displacement effects determine the levels of synergies of appeal and complementarities between visitor attractions. These factors often result in an overwhelming advantage for co-location and spatial clustering, apart from brand clusters (Figure 16.4). Brand clusters are not necessarily based on co-location of tourism firms but on thematic product similarity, which will be further discussed.

All regional and local authorities in Cornwall address spatial location policies with an overwhelming emphasis on sustainable tourism development, including accessibility to public transport and the use of brownfield sites and other spaces within existing urban areas. Tourism policies do not identify Newquay and the Lizard Peninsula as tourism clusters. However, some policies refer both explicitly and implicitly to co-location and clustering between tourism businesses in general, and visitor attractions in particular. High quality attractions (e.g. iconic attractions) are perceived to have a positive impact on spatial clustering resulting in increasing overall destination appeal (SWT and SWRDA 2005). The development of brownfield sites and building within town centres in order to minimize the loss of green spaces, implicitly involves spatial clustering (Cornwall County Council 2004, Kerrier District Council 2002, 2005a, 2005b, Restormel Borough Council

2001, 2004, Wright 2000, 2003). However, this tells us little about the relational characteristics of clusters.

Cooperation and innovation are mostly addressed by the SWT and SWRDA's (2005) initiative 'Brand Cluster'. This is the only policy initiative relating to forming networks and collaboration and a good example of thematic clustering that encourages joint marketing initiatives and diffusion of innovations amongst similar product attractions and other businesses targeting similar markets. Such thematic cluster initiatives focus on the holiday experience that customers are perceived to want, regardless of the cluster's spatial location. The aim is '... to bring relevant businesses and organisations, including attractions, accommodation facilities, entertainment, food and drink, and retail together across the region to build and shape their particular cluster' (SWT 2002: 2). In this thematic cluster initiative, thematic clusters focus on various forms of tourism and types of holiday such as adventure tourism, business tourism, and traditional seaside tourism. This cluster framework is seen to encourage tourism businesses to collaborate '... through shared market intelligence, identification and development of new initiatives to drive up quality, shared promotion and collaboration on product development and opportunities facing the cluster' (SWT 2002: 2). For example, each cluster will have its own website as its main marketing activity, promoted through a variety of targeted campaigns (SWT 2005).

From this analysis of the existing policy environment, a policy translation gap is observed between the tourism cluster as understood in conceptual terms, and how clusters are articulated and given meaning in recent development planning policies in the study areas. This gap between formal 'written' policies and the views of tourism stakeholders on the cluster concept is in part filled by informal forms of governance, observable in the 'unwritten' policy guidelines influencing the decision planning process. These guidelines include common opinions and principles, which are shared by the majority of stakeholders and decision makers in tourism clusters but are not legally binding.

## The Cluster Concept and the Role of Formal and 'Unwritten' Policy Guidelines

The study examined whether there is support for the cluster concept amongst nine policy makers and practitioners, and how the concept of clusters is perceived amongst 23 tourism operators. The nine key informants, who were engaged in developing policy guidelines and/or determining planning applications, provided insights into how they perceived the actual and potential application of clusters. Most of the 23 attraction managers also provided insights into their locational decisions. These findings reveal different interpretations of the cluster concept within policy mechanisms (such local/regional planning committees), whereby policies are set up and interpreted in the form of policy papers (e.g. regional strategy papers and local plans).

*Text: The Cluster Concept*

Most key informants understood the term 'cluster' as an organisational structure that provided opportunities for cooperation and partnerships between attractions and other tourism businesses. Some key informants were very familiar with the cluster concept in relation to other industries, but less so tourism. Key informants envisaged co-location and cooperative competition between firms:

> A tourism cluster to me works at four levels. The first is people who collaborate on marketing, the next level is to collaborate on business performance, and that's issues to do with benchmarking against each other, wage rates etc. The third level is to do with solving shared problems and real practical opportunities ... and none of them do the last two, which is to do with skills labour supply, maybe procuring systems together, be it electronic system, if I'm thinking about attractions. The fourth level, I would say about any cluster, is about research and innovation and creativity. I used to come from mainstream economic development ... (Key Informant, senior officer in a regional agency).

> In a way, you have got a group of businesses and a range of activities in a sector, which is related closely to each other. Clusters are a good term, because that does cover a lot of what you have been hinting at, because you are bringing in physical proximity, a degree of uncritical mass and you are also talking about linkages (Key Informant, planning policy officer).

> [a cluster is] … a group of businesses, which have co-located, … not because of joint collaboration or the willingness to co-locate, [but] for an outside force, [such as] location, available market, and is really a fight for markets (Key Informant, senior tourism officer in Cornwall Enterprise).

Cluster size or configuration was also perceived differently; some key informants referred to a cluster as having an optimal geographical size. One (a head of a tourism association), thought 'cluster' related to the number of visitors, and another (a senior officer in a regional agency) claimed that optimal size varied depending on ' ... on the size of the city, it's the natural networking that takes place in that size of area. So if you take the Lizard, it's probably the whole Lizard Peninsula. If you take Newquay, it's going to be within five miles of Newquay'. Another key informant (a head of a tourism alliance), illustrated his answer by pointing to an estimated radius around Newquay or the Lizard:

> ... if you take Newquay and draw a 10 mile line around Newquay, it encompasses everything you know, that goes out as far as probably, Holywell Bay fun Park, Dairyland, and those in Newquay the Zoo, Aquarium, Tunnels Through Time and you have to go, if you look at it, there is not one that is more than 10 miles from Helston. Helston is in the Central point, you take a 10 mile radius.

Four key informants were uncertain about the meaning of the term and understood it as 'where tourists visit and stay' or as a synonym for a destination: ' … I think it has to be an area where tourism is a major industry' (Key Informant). Only two key informants defined the cluster concept in terms of how attractions operated together. Most of the key informants admitted the concept was unknown to most attraction and tourism business operators: ' ... but the majority know very little [about the cluster concept] and I'd be surprised if they'd come across it. It's a new concept for tourism to work in clusters. It should do' (key informant). Another key informant, who is also a senior tourism policy officer, voiced a similar opinion:

> It is a term you don't normally associate with tourism attractions. You know what a business cluster is, whether it is IT [Information Technology] or medical or whatever, and there is always symbiotic relationships, and you can see lots of options of clustering working.

A key informant, who was previously a tourism officer, was more critical and doubted whether 'cluster' meant anything to an attraction operator:

> I think it is very elitist clap shot. What an attraction is looking for at the end of the day, is to get marketing bullocks, what an attraction operator would want is, where is my business coming from? How do I increase my business? That's what they are looking for, and also am I offering a good product? The thing that people are looking for now is Cornish identity, and what we have got to come from is what does the customer want [customer oriented approach]?

One key informant (a councillor) was quite sarcastic, implying that the term was another 'mantra' to increase chances of getting EU funding:

> The world cluster has suddenly become the "in" word. Where is this? Where does it come from? Why are we suddenly starting to call [them] clusters? I have been to Brussels recently, heard the word "innovation". If you want money, that's what it is all about, getting money if you "I-nno-vate ... " (accentuates the word grotesquely).

The difference in the way key informants (including those who were or still are attraction managers) perceived and interpreted the cluster concept, in the context of tourism, illustrates that it has very little to do with running tourism businesses in general, and tourist attractions in particular. Even though key informants may not recognise the term 'cluster', four of them recognised relationships that are typical of clusters such as cooperation and competition, and six respondents recognised Newquay and the Lizard as geographical tourism clusters. An important finding in this regard is that the cluster concept does not appear to affect or shape development and planning policies. It is not surprising, therefore, that 'clusters' do not appear in or guide tourism development itself. However, as the next section reveals, the determination of planning applications was influenced by unwritten' guidelines that are related to the principles of cluster policies. This use of the concept provides the sub text to our story of the way that tourism planning and policy take place.

## Subtext: Cluster Policies in Decision Making for Visitor Attractions

When discussing the tourism policies and guidelines underlying the determination of planning applications, most of the key informants placed an overwhelming focus on practical issues such as environmental impacts, infrastructure availability and sustainability issues. Planning applications are challenged on aspects such as road access: 'Will it create too much traffic in a certain area?' 'Is there suitable sewage capacity' or 'Is public transport available and how accessible is the proposed development site?' (key informants). Other informants noted that:

> If you wanted to develop a large attraction on the Lizard, then the first thing it would be is "what about the road?" I mean that would be a major consideration.

Another key informant tried to place the notion of clusters in perspective:

> ... No, I don't think they are promoting clustering. In theory, you are looking at the whole issue of sustainability. So if somebody can get them from somewhere to somewhere else by public transport without having to drive, especially in rural areas, that would be a bonus.

A key informant, who took part in development control process for new attractions, revealed that planning applications had generally been considered without reference to the presence or absence of neighbouring businesses and attractions, let alone the particular focus of those attractions:

> ... I don't think of that in attractions, it is not my business; I am a farmer, that's my background. And I believe in primary industry, we are in the real world. I see that visitors perhaps have things to go to, I understand that. But ... for example, the camel attraction, they needed a planning permission, did they? They didn't! They just turned up. So all you do you look at them, but you don't really look at them in relation to others.

This key informant also claimed that disregard for the locations of other attractions was the norm in the planning process, which was primarily influenced by commercial and other reasons associated with the specific conditions of a particular site. Key informants were also unaware of tourism policies addressing the impact of spatial proximity on clustering of visitor attractions and regarded tourism planning applications as being similar to other planning decisions, such as that for the erection of a new prison. Their quote below concedes that although tourism policies do not refer explicitly to competition with neighbouring attractions in the decision making process, other attractions may object to applications submitted by potential competitors on various grounds, but their underlying motive is fear of increasing competition:

> I don't think proximity has ever had any effects on whether planning permission has been granted as such. What you have to remember is that if somebody wants to open a new theme park like Flambards, two miles up the road, Flambards would object strongly. The councillors would have to take notice of such objections.

Similarly, displacement of visitors from one attraction to another was mentioned in the context of co-location and competition: '... the displacement aspect is a key criterion for lots of people considering attractions. Will this truly be a benefit to visitors or will this just displace visitors who would've gone to that attraction to come to this one?' These issues, related to clustering, are ignored by formal policies as alluded to by a key tourism officer in a regional agency, who was asked whether planning policies address clustering: 'No, the policies don't address clustering, it's probably people given advice, like us ...There hopefully will be [clustering related policies] in the new regional spatial strategy but there's nothing at the moment'. Although the majority of key informants did not argue that policies in general address this issue, one of them assumed that they might '... discourage close proximity and clustering of similar businesses ... [and that] complementary attractions are probably encouraged'.

The closer we look at how individual tourism attractions have emerged over time, the more difficult it is to provide a simple account of the relationship between tourism policy and the presence or absence of notions of clustering in policy formation. This is particularly evident when considering accounts of the historical reasons for the locations of attractions on the Lizard cluster:

> ... just look at the attractions you have on the Lizard. They are all there, not because somebody said "this is a good place for a tourist attraction", but because something was already there ... The first thing is if you take Goonhilly [a thematic-technology park attraction]. That was put there originally as the ideal place for the dishes. Flambards [a mixture of fun and theme park] was actually started by an ex-commander in the navy, who was able to buy scrap aeroplanes off the navy and put them on a site next to Culdrose. The Seal Sanctuary started because there were pools of sorts and seawater, and people would bring seals in. Even Poldark mine, which we've said was not successful, was there because there was a mineshaft that was actually adaptable to what it did ... (Key Informant, councillor).

Another key informant described in detail the application process of the Seal Sanctuary:

> ... the gentleman was saying "I want a place to put six seals", you know, where we all had doubts what he really wanted and we were quite right, he simply wanted a massive holiday attraction, which he very cleverly worked out and then moved away. Now it is all about environment, looking after sick animals, it wasn't like that when it started. It was a straight forward attempt to make money and worked out to get to that (Key Informant, councillor)

Similarly, in Newquay, some attractions were found to have been established in other forms, such as a farm or a wildlife sanctuary, and developed into visitor attractions for various reasons, such as commercial opportunities that became viable with the movement from agriculture to tourism, or simply by chance. For example, a wildlife attraction '... was never set up as … well, it was never set up as a zoo. It was actually set up exactly as a rescue and rehabilitation centre for wild birds preying …' (Key Informant, a wildlife attraction manager). Another landowner '... was a big poultry farmer who had one of the biggest egg distribution businesses and then in the 1980s was it … salmonella … he also went bankrupt and that's when he set this up … first of all as a garden centre'. These premises were developed eventually into a wildlife attraction as well.

Here, 'unwritten' or informal clustering policies and its implications for cooperation between attractions in Newquay were identified by a key informant as influential factors on development control process:

> ... there was a proposal there to build a hotel. And a part of the argument (that the owners of Dairyland [a wildlife attraction] put) was that more people would stay on the site. That was refused and they went to appeal but they lost it. There is also a proposal very near there now to have a ski slope, very close to Dairyland but then again it is just in Carrick. And one of the arguments, which is the people promoting the ski slope, apart from the fact that it was on the main road to Newquay was the proximity to Dairyland and other big attractions, so you would have a cluster developed (Key Informant).

Another wildlife attraction in Newquay evolved in a similar process:

> It was actually a farm and they opened a campsite next door, and they realised to be competitive in Cornwall they needed to offer more than just a campsite, so what they did is open a golf course next door first and it all started fairly two years ago with a car track and it's gradually being built up ever since (Key Informant and a wildlife attraction manager).

The emergence of another amusement park attraction in Newquay shows a similar a tendency to clustering of attractions: 'they [the local authority] were developing [a garden attraction] that had been there since the 1930s and they were interested in developing tourist facilities so they added [an amusement attraction] to their development'. The advantage of proximity between attractions was also used to advocate the approval of a new tourist attraction next to an existing one. Not only was the impact of spatial proximity and density between attractions on the appeal to visitors proclaimed, but also that of thematic similarity:

> ... I think the best one to my mind was the National Maritime Museum, Cornwall, where when that was being developed in the planning permission, it was very much seen as one that can become at the centre of a more attractive offering because you had the small local museum, you had the whole of the waterfront that needed doing, and you had Falmouth itself, living off sailing, and the Maritime Museum would create a hub and a focus for what was a maritime theme. Because you need an icon in the middle of it, so that's probably a very positive and obvious one … The other one I would actually say is Fistral Blue at Newquay, where they needed to raise the quality and provision of support on the beach for the visitors. Not a classic attraction, but one that is seen as adding to the quality of the product in providing an area where retail could operate from (Key Informant).

This example illustrates that a combination of spatial proximity, thematic product similarity and complementarity between attractions and other retail outlets were considered advantageous for creating synergies of appeal between attractions. It appears that the supportive arguments in planning applications included complementary relationships and spatial-thematic clustering. A key informant also highlighted the need to consider the element of complementary relationships between attractions: 'What I mean is, you don't want exactly two zoos, but you might be talking about a zoo and then something natural in the local environment'. Unfortunately, '... the policies that are there ... They don't make it explicit enough' (Key Informant). In practice, it appears that entrepreneurs or investors consider these issues, which are addressed by the planning system, as explained by a head of a tourism association, whose view reflects those of others:

> ... [locations of other attractions in the vicinity] ... wouldn't get the planning [consideration]. I think the managers or the owners of the attractions would already decide that it wouldn't be the right thing to do. While if somebody across the road wants to build something the same as this, they will go with their point, because they already got them. So I wouldn't have thought that it would come into planning" (Key Informant).

It appears that most clustering issues are viewed as commercial considerations best left to market forces, as argued by an experienced tourism professional and the head of a tourism association: 'The difficulty in England is that planning applications are based on whether you are allowed to build on a certain area and not on the business needs'. In other words, as in other areas of the United Kingdom planning policy and practice, the strategic and operational issues relating to individual businesses (let alone clusters of businesses) are not formally considered. However, as this study reveals, these commercial considerations often involve considerations of competition, including displacement effects, as well as synergies of appeal and complementarities amongst attractions and between attractions and other businesses. Yet these issues – which are at the core of the cluster concept – are not represented in tourism policies. However, they are identified as informal guidelines used by tourism protagonists, decision makers and investors. Moreover, some of these unwritten guidelines are interrelated, such as synergies and complementarities.

## Conclusions

The aim of the chapter was to explore the theoretical and practical application of the concept of clusters by examining engagement with and resistance to the concept of clusters within tourism policy and practice, drawing on a case study of tourism attraction clusters and policy making in Cornwall, England. In particular, it has examined how the opaqueness of tourism clusters has contributed to contested meanings, to difficulties in embodying the cluster concept in policies, and in implementing notions of clusters via development approval processes. The chapter has contributed to the understanding of tourism planning processes, principles and practices by exploring formal tourism policies in two destination clusters that are complemented by several 'stories' of visitor attractions in terms of locational decision-making and some management aspects. A comparative case study of two attraction clusters in Cornwall provided the opportunity to examine how clusters are defined, understood, given meaning and implemented (or not). In particular, the chapter looked at the relationship between the theoretical concept, how it is formally conceptualised in policy and how it is informally given meaning and life.

Similar to other 'stories' in this book, the 'stories' told by the policy documents, the key informants and the tourism attractions owners/managers have unfolded different theoretical positions that provide important insights, and expose readers to the complex and historically dependent way that tourism planning and policy have developed. They reveal the people that influence and shape tourism planning and policy-making processes as well as the complicated webs of relationships between key players, gaps and ambiguities between formal and informal tourism planning policies and the locational decision making in practice. Although the stories told here are necessarily relatively short, they provide insights into the policy gaps between theories and practices that are in many ways typical of the policy and planning framework for attractions and other tourism facilities. In this way, they contribute to critical reflection upon the causal relationships between the different actors and planning policies that shape tourism clusters. This chapter suggests that storytelling in the form of anthology can contribute to revealing translation and implementation gaps between planning theory and practice, and the messiness of individual decision making in the real world that is revealed by considering the sub-text of tourism policies.

At the beginning of this chapter, the overview of academic literature on clusters and regional development established that it is a well-developed concept. Within this literature a shift was observed over the last two decades, from unquestioning acceptance of clusters as a tool for economic development to a more critical stance. Social constructionist research has sought to tease out the difficulties and opportunities associated with clusters, and highlighted that the concept is not 'a golden chalice' for economic development and innovation. In the field of tourism, there has been little attention placed on exploring the concept of clusters, much less the barriers and opportunities to implementation. The research described in this chapter makes a contribution to the literature then by elaborating a particular story of practice – a story wherein a theoretical concept well established in literature is shown to be vague and problematic in the daily lives and actions of both public officials and attraction operators.

This chapter reveals the co-existence of formal (text) and 'unwritten' (sub-text) of policy. The case study findings show that the cluster concept remains a theoretical domain rather than having become incorporated into the professional language of tourism policy makers and developers (Michael 2007, Leibovitz 2004, Novelli et al. 2006). A policy climate dominated by neoliberalism is characterised by selective commercial interests playing a significant role in the planning process and shaping the growth of visitor attractions. It is too early to tell whether the 'crisis of capitalism' which was revealed in the Global Financial Crisis of 2009–10 will lead to either significant changes in regulatory systems in the 'main street' economy as well as the financial sector. It is also unclear whether this crisis will have implications for the development of tourism attractions.

This case study of two tourism clusters found that tourism policies and guidelines did not significantly shape the determination of planning applications in Cornwall. Determination was driven predominantly by sustainability and environmental concerns. Such concerns were given greater weight in development control processes than tourism clusters and related concepts of cooperation, competition, innovations and regional appeal, largely because they were not considered as relevant to public sector planners. Spatial and thematic clustering was found not to be grounded in policy guidelines and regulations, although they were found to affect the selection of sustainable locations for new tourism businesses and attractions. Notwithstanding the gap between text and sub-text that we outlined earlier, competition for and appeal to visitors play a major role in determining many planning decisions. However, while regional/local competition between tourism businesses is important, cooperation, knowledge transfer and innovations were neither explicitly considered nor acknowledged by most of the decision-makers identified in this research.

The study also revealed a disregard in policy guidelines for the specific features of production and consumption in the tourism industry, along with inconsistencies between policy guidelines and the actual practices that underpin the processing of planning applications. The locations of visitor attractions, and the shaping of tourism spaces, do reflect the emergence of tourism clusters but these are driven more by individual private capital interests, than by interventions by decision makers and formal or informal policy guidelines. The policy gap is therefore characterised by two factors: (1) a failure to incorporate clusters in formal polices at the regional and local scales, and (2) a gap between formal polices and unwritten guidelines in determining planning applications for new attractions.

This chapter has also provided an opportunity to enhance our understandings of the challenges of tourism planning, policy making and governance in translating clustering policies into practice. The planning process, resulting in the co-location and clustering of visitor attractions has been explored using a critical, social constructionist approach whereby contradictory forces play out in the decisions and actions of various stakeholders. The study also sought to contribute understandings of the applicability of Porter's (1991, 1998) cluster theory to tourism. Factor and demand conditions, such as thematic clustering and complementarities affecting visitor preferences (Weidenfeld et al. 2009) do play out in the locational decision making process. While issues such as a concern for the spatial proximity of potential competitors were not the focus of this research, they are present in the 'sub-text' of how planning applications for new attractions are dealt with in practice.

Clustering strategies are mostly characterised by a 'bottom-up' approach (Hallencreutz and Lundequist 2003) through informal (sub-text) policies, implemented by both public and private sector stakeholders, who shape the development planning process in the context of local circumstances. This process addresses the issue of how to consider the full range of stakeholders' interests, many of which tend to be marginalised by tourism formal policies in both the clusters (Dredge 2006). The chapter showed that tourism clusters are mostly the outcome of accidental and deliberate actions, facilitated mostly by sub-text policies, that reflect power struggles and commercial interests, typical of the general relational complexities of tourism planning and policy making (Newlands 2003). A key conclusion of the study then is that explicit clustering policies should be pursued not only for their economic logic, but in order to address the range of stakeholder interests, which are often ignored by current planning strategic policies.

Further attention should be given to increasing the awareness of both local and regional authorities and entrepreneurs of the importance of incorporating aspects of collaboration (particularly in marketing) (Fyall et al. 2001), knowledge transfer and diffusion of innovations into locational decision making processes. Finally, while the story told here is of two clusters in Cornwall, this case study has implications for understanding both the general gap between theories and practices, as well as a continuing neglect of fundamental economic concepts which is distinctive of although by no means unique to, tourism in the United Kingdom, and perhaps to other developed countries.

## References


Boschma, R.A. 2005. Proximity and innovation: A critical assessment, *Regional Studies*, 39, 61–74.

Burfitt, A. and Macneill, S. 2008. The Challenges of Pursuing Cluster Policy in the Congested State. *International Journal of Urban and Regional Research*, 32, 492–505.

Cornwall County Council. 2003. *The County – Characteristics*. [Online]. Available at: http://www.cornwall.gov.uk/index.cfm?articleid=651, http://www.cornwall.gov.uk/index.cfm?articleid=1949&articleaction=print [accessed: 2 January 2006].

Cornwall County Council 2004. *Cornwall Structure Plan, Policy 13: Tourism and Recreation*. [Online]. Available at: http://www.cornwall.gov.uk/index.cfm?articleid=9146 [accessed: 12 February 2006].

Cornwall County Council 2005. *The Economic Impact of Tourism in Cornwall and its districts*. [Online]. Available at: www.cornwall.gov.uk [accessed: 14 Jaunary 2007].

Cracolici, M.F. and Nijkamp, P. 2006. Competition among tourist destinations: an application of data envelopment analysis to Italian Provinces, in *Tourism and Regional Development: New Pathways*, edited by M. Giaoutzi and P. Nijkamp. Aldershot: Ashgate, 133–52.

Dredge, D. 2006. Policy networks and the local organisation of tourism. *Tourism Management*, 27, 269–80.

Finn, M., Elliot-White, M, and Walton, M. 2000. *Tourism and leisure research methods: data collection, analysis, and interpretation*. Harlow: Longman.

Fyall, A., Leask, A and Garrod, B. 2001. Scottish visitor attractions: a collaborative future. *International Journal of Tourism Research*, 3, 211–28.

Fyall, A., Leask, A. and Garrod, B. 2002. Introduction: visitor attractions. *International Journal of Tourism Research*, 4, 333–5.

Hall, M.C. 2004. Small firms and wine and food tourism in New Zealand: issues of collaboration, clusters and lifestyles, in *Small Firms in Tourism – International Perspectives*, edited by R. Thomas. London: Elsevier, 167–81.

Hall, M.C., Lynch, P., Michael, E.J. and Mitchell, R. 2007. The contribution of the Micro-Cluster Approach, in *Micro-Clusters and Networks: The Growth of Tourism*, edited by E.J. Michael. Oxford: Elsevier, 141–52.

Hajdaš Dončić, S.H., Horvat, D., and Smid, I. 2007. Cluster-Model for inter-regional linking of continental agrotourist destinations. *Acta Turistica Nova*, 1(1), 1–122.

Hudson, R. and Williams, A.M. 1999. Re-shaping Europe: the challenge of new divisions within a homogenized political-economic space, in *Divided Europe: Society and Territory*, edited by R. Hudson and A.M. Williams. London: Sage, 1–29.

Jackson, J. 2006. Developing regional tourism in China: the potential for activating business clusters in a socialist market economy. *Tourism Management,* 27(4), 695–706.

Jackson, J. and Murphy, P. 2006. Clusters in regional tourism – An Australian case. *Annals of Tourism Research,* 33(4), 1018–35.

Kerrier District Council. 2002. *Kerrier District Local Plan, Revised Deposit Draft, Tourism, recreation and leisure.* [Online]. Available at: http://www.kerrier.gov.uk/media/adobe/a/q/Chap%2010.pdf [accessed: 20 January 2006].

Kerrier District Council. 2005a. *The Local Development Framework, Planning Issues – Report for Consultation.* [Online]. Available at: http://www.kerrier.gov.uk/media/adobe/l/2/Issues%20Report%20Tourism%20and%20Recreation.pdf [accessed: 25 January 2006].

Kerrier District Council. 2005b. *Kerrier Local development Framework, Annual Monitoring Report April 2004–March 2005.* [Online]. Available at: http://www.kerrier.gov.uk/media/docs/d/r/KDC_Annual_Monitoring_Report_2005.doc [accessed: 9 March 2006].

Keller, P. 2006. *Innovation and Tourism Policy.* [Online]. Available at: http://www.oecd.org/document/55/0,3343,en_2649_34389_37987511_1_1_1_1,00.html#getbook [accessed: 11 April 2010].

Ketels, C. 2003. *The Development of the Cluster Concept – present experiences and further developments.* Paper to the NRW conference on clusters, Duisburg, Germany, 5 December 2003.

Leibovitz, J. 2004. 'Embryonic' knowledge-based clusters and cities: The case of biotechnology in Scotland. *Urban Studies,* 41(5/6), 1133–55.

Maskell, P., and Malmberg, A. 2007. Myopia, knowledge development and cluster evolution. *Journal of Economic Geography,* 7, 603–18.

Middleton, V.T.C. and Clarke, J. 2001. *Marketing in Travel and Tourism.* Oxford: Butterworth-Heinemann.

Michael, E.J. 2007. *Micro-clusters: antiques, retailing and business practice.* Oxford, United Kingdom: Elsevier.

Newlands, D. 2003. Competition and cooperation in industrial clusters: The implications for public policy. *European Planning Studies,* 11, 521–32.

Nordin, S. 2003. *Tourism Clustering and Innovation – Paths to Economic Growth and Development.* Oestersund, Sweden: European Tourism Research Institute, Mid-Sweden University.

Novelli, M., Schmitz, B. and Spencer, T. 2006. Networks, clusters and innovation in tourism: A UK experience. *Tourism Management,* 27, 1141–52.

Porter, M. 1990. *The competitive advantage of Nations.* New York: The Free Press.

Porter, M.E. 1998. *On competition.* Boston: Harvard Business Review Press.

Raco, M. 1999. Competition, collaboration and the New Industrial Districts: examining the institutional turn in local economic development. *Urban Studies,* 36, 951–68.

Restormel Borough Council. 2001. *Restormel Borough Council Local Plan 2001–2011*. [Online]. Available at: http://www.restormel.gov.uk/LocalPlan/index_policies.htm [accessed: 18 March 2008].

Restormel Borough Council. 2004. *Corporate Plan for 2003–2006*. [Online]. Available at: http://www.restormel.gov.uk/media/docs/r/l/Backup%20of%20Corporate%20Plan%20-%2011th%20Draft%206th%20May%2004.wbk [accessed: 12 March 2008].

Restormel Borough Council. 2005. *Newquay Action Plan, Local Development Framework (LDF)*. [Online]. Available at: http://www.restormel.gov.uk/media/adobe/f/c/Newquay_Action_Plan_web_1.pdf [accessed: 18 March 2008].

Ritchie, J. and Spencer, L. 1994. Qualitative data analysis for applied policy research, in *Analyzing Qualitative Data*, edited by A. Bryman and R.G. Burgess. London: Routledge, 173–94.

South West Tourism. 2002. *Newquay Visitor Survey*. Exeter, United Kingdom: Research Department.

South West Tourism (SWT) and South West of England Regional Development Agency (SWRDA). 2005. *Towards 2015, Shaping Tomorrow's Tourism, South West England*. [Online]. Available at: http://towards2015.co.uk/downloads/vision_0105.pdf [accessed: 20 March 2010].

Swarbrooke, J. 2001. Key challenges for visitor attraction managers in the UK. *Journal of Leisure Property*, 1(4), 318–36.

Vanhove, N. 2002 Tourism policy – between competitiveness and sustainability: the case of Bruges, discussion forum. *Tourism Review*, 57, 34–40.

Vanhove, N. 2006. A comparative analysis of competition models for tourism destinations, in *Progress in Tourism Marketing*, edited by M. Kozak and L. Andreu. Elsevier: Oxford, 101–14.

Waitt, G. 2003. Social impacts of the Sydney Olympics. *Annals of Tourism Research* 30(1), 194–215.

Watson, S. and McCracken, M. 2000. No attraction in strategic thinking: Perceptions on current and future skills needs for visitor attraction managers. *International Journal of Tourism Research*, 4, 367–78.

Weidenfeld, A., Butler, R.W. and Williams, A.M. (2009). Clustering and Compatibility between Tourism Attractions. *International Journal of Tourism Research*, 12(1), 1–16.

Wright, P. 2000. *Tourism Policy Paper documents*. Restormel Borough Council, unpublished manuscript.

Wright, P 2003. *Tourism Policy Paper documents*. Restormel Borough Council, unpublished manuscript.

StarUK. 2008. *Statistics on Tourism and Research UK*. [Online]. Available at: www.staruk.org.uk [accessed: 18 March 2008]