

Spatial Competition and Agglomeration in the Visitor Attraction Sector

*This paper provides a theoretical and empirical contribution to understanding spatial competition by **examining visitor attractions in two contrasting clusters** of lower and higher levels of agglomeration of businesses in Cornwall, the UK. The study found that competition is mainly for customers and labour and is related differently to the levels of agglomeration, spatial proximity and thematic product similarity between visitor attractions at the local compared to the regional scale. Location can be used differently for employing ‘weak’ and ‘strong’ competitive strategies. The study contributes to the knowledge on the spatiality of competition and the locational strategies **of service businesses**.*

Keywords: spatial competition, visitor attractions, agglomeration, thematic similarity

Introduction

There has long been recognition in the work of geographers of the nature and importance of spatial differentiation in both production and consumption, but more recently distance has re-entered mainstream economics in the form of the ‘new economic geography’ (Krugman, 1991, 1998) or geographical economics (Brakman, Garretsen, & Marrewijk, 2001; Venables, 2006).; This is understood as the study of spatial relationships between economic actors (Krugman, 1991, 1998), and an attempt to put more geography into economics (Brakman, et al., 2001). Much of the early research focussed on manufacturing industries and has analysed inter- and intra-urban locations, but there has been significant growth of research on the service sector, mostly in metropolitan areas (Wernerheim & Sharpe, 2005).

Geographers have long recognized the importance of location, and more recently place (see Hudson 2001 for an incisive review). This is hardly surprising, given that, in the retailing sector, for example, location is considered paramount in considering product differentiation strategies, such as depth and breadth of product assortment, product quality, price, promotions and customer service. Location choice decisions involve considering firm entry conditions such as market demand, costs, logistical issues, proximity to and size of customer base, distance to headquarters and distribution centres and to actual and potential competitors (Zhu & Singh, 2009). Although significant progress has been made in

understanding locational issues in the service industries (Wernerheim & Sharpe, 2005), there is still a lack of coherent theoretical and empirical frameworks for analysing these (Harrington, 1995).

The nature of tourism consumption, including tempo-spatial limits on the combination of different activities, has implications for competition in the visitor attraction sector. The attraction sector was studied because it is relatively under-researched despite being a key component of the tourism experience (Fyall, Leask, & Garrod, 2002; Middleton & Clarke, 2001; Swarbrooke, 2001; Watson & McCracken, 2002). There is fierce competition between attractions, leisure and sports facilities, educational activities and retail-based complexes that have purpose-designed themes of hospitality, leisure, entertainment and are retail-marketed as leisure day out experiences (Middleton & Clarke, 2001; Swarbrooke, 2001). Both the competition between tourism organisations and the competitive aspect of location have been neglected (Wang & Krakover, 2008). This paper explores the relatively neglected issue of spatial competition, which has two dimensions: competition over location with other firms, and competitive strategies using space as a strategic tool. These will be examined by gauging the views of visitor attractions' managers on competition in this sector.

Economic geographers argue that competition between places cannot be reduced to competition between firms, and can only be examined in terms of uneven development in geographically differentiated spaces of production (Sheppard, 2000). Accordingly, this study questions the impact of spatial competition between visitor attractions in different destination clusters in terms of their levels of agglomeration and product similarity. Tourism clusters are destinations with a range of co-located firms, such as accommodation, attractions and retail outlets, which have varying levels of competitive, cooperative and complementary relationships with a potential for synergies (Jackson & Murphy, 2006; Michael, 2007; Wang & Fesenmaier, 2007; Weidenfeld, Williams & Butler, 2011).

This paper revisits the concept of spatial competition by comparing competition amongst regional groups of visitor attractions at higher and lower levels of spatial density and thematic similarity at the destination cluster region. It also examines spatial competition between neighbouring individual visitor attractions at different levels of spatial proximity and thematic similarity at the local scale, and also questions whether and how firms may use location to implement different competitive strategies in the service industry by focusing on the visitor attraction sector.

The paper begins by exploring existing knowledge on competition and competitiveness amongst visitor attractions, and the relationships between competition and spatial proximity in general, and spatial competition in particular. We first outline some key theoretical issues, followed by a discussion of the methodology, before exploring our empirical findings based on a case study of two clusters in Cornwall, UK, and conclude by reflecting on theoretical and policy implications. The main focus of analysis is individual visitor attractions and the views of their managers in the context of their regional setting and understandings of spatial competition.

Spatial competition

Firms reveal spatial preferences that serve their long-term interests and endow them with both comparative and competitive advantages. Different competitive strategies may use space consciously or subconsciously as a strategic tool with various spatial implications. Some firms may compete for ‘the optimum’ location when choosing a new site, and consider factors such as environmental setting and proximity to markets and other competitors. Some may choose to locate in a clustered or non-clustered tourism space, and engage with the spatial implications of their decisions via their competitive strategies. Others may change their competitive strategies, or employ new ones, in response to the emergence of new proximal firms and the evolution of clusters over time.

Spatial competition refers to the locational advantage of firms in competition for market share, and the influence of pricing. There is substantial literature on this issue dating from Hotelling (1929), who argued that firms competing on the basis of prices tend to locate far from each other, whereas firms competing in quantities tend to agglomerate at the centre of the market. Previous studies (Collins & Sherstyuk, 2000; Kim, Lozano-Vivas, & Morales, 2007; Ning & Haining, 2003; Plummer, 1996; Rushton & Thill, 1989; Williams & Kim, 1990) present neoclassical models of spatial competition, proposing development of formal models for a limited range of institutional structures: spatial price, equilibrium, oligopolistic competition and monopolistic competition. Others have studied spatial competition in context of the labour market and its effect on wages and unemployment (Nakagome, 1986), and in the context of the advantages of distant firms in exploiting local monopolies economies versus agglomeration economies that may offset harmful competition effects (Tsang and Yip, 2009).

In tourism, an improvement in transport can reinforce the agglomeration of tourism firms in the most developed region, where firms can benefit from agglomeration economies and backward linkages. In such cases, firms tend to invest in a differentiated tourism, which may limit concentration of tourism activities (Masson & Petiot, 2009). Similarly, in the retail sector, spatial competition intensifies directly in relation to a decrease in distance to rivals, with significant returns to spatial differentiation (Zhu & Singh, 2009).

Competition in tourism

Competition in tourism is primarily for the time and money of the customers, as firms tend to be engaged in horizontal and vertical product differentiation and compete to increase their profit margin by maximising their final price as well as their share of their total generated margin through increasing their market share, cost reductions and pricing (Buhalis, 2006; Papatheodorou, 2004). Their ability to compete depends on the interaction of three elements:

market competition for the same tourist profile, development of new or adjustment of existing products or production processes (innovations) and existing forms of production (competition between similar products) (Ioannides & Petersen, 2003). Unlike those industries where production depends on material interchanges between spatially adjacent processes, in tourism and other consumer service industries, such as retailing, distinctive features of production and consumption shape competition (Marshall & Wood, 1995; Shaw & Williams 2004). First, customers come to suppliers and supply as demand sit together in the same locations and not vice versa. Face to face supplier-customer interaction is pivotal. Although some types of service activities can relocate without significant costs or difficulty in retaining customers (such as web site designers), this is far more difficult for hotels and visitor attractions because they are more sensitive to their market location and the tangible and intangible features of the tourism product (Daniels, 1985). Location, therefore, is an inextricable part of the tourism product (Baerenholdt & Haldrup, 2006) but the consequences for locational strategies are complex.

Secondly, the tourism experience is based on co-production of the tourism experience by multiple entities, so tourism firms are both competing with, and dependent on the performances of each other and – for example, in generating repeat visits to a tourism destination. Thirdly, tourism is characterised by perishability as services have to be consumed at a particular time, as their supply cannot usually be deferred: for example, hotel beds have to be filled each night, and excess demand cannot be served or deferred. Therefore, management of demand in relation to capacity is an important element of competition for visitor attractions. Fourthly, the tourism product is partly intangible, and is perhaps best understood in terms of the experience economy (Pine and Gilmore, 1999: 3), thus ‘tourism performance’ (Crang, 1997; Coleman & Crang, 2002) is an important element of competition, placing particular emphasis on the role of the workforce.

Competition between visitor attractions

A five-level framework (Buhalis, 2006) provides a relatively comprehensive framework for studying competition in tourism, although the inclusion of different types of tourism entities at different spatial scales is problematic as tourism destinations and tourism organisations vary enormously in size and spatial relationships and are highly complex. The first level refers to competition from proximal, similar product attractions (e.g. theme parks, gardens) and service providers, for which visitor attractions may develop 'co-opetition' (co-operative competition) strategies and collaborate at the regional scale. The second, competition from distant similar product attractions, drives regional collaboration between neighbouring attractions to establish their brand and collective differentiation; it applies to competition from similar or undifferentiated regions. The third level refers to competition in differentiated regions from dissimilar product attractions, whose 'uniqueness' adds value in ways which do not make them easily substitutable. The fourth level addresses competition with other tourism firms within the distribution channel. The fifth level relates to competition with recreational and leisure facilities and activities both at places of origin and in tourism destinations. Levels 2, 3 and 5 above can be associated with similar, dissimilar, differentiate or undifferentiated visitor attractions.

In tourism, competition is common amongst similar-product businesses in the same sector; for example, similarities in terms of size, room price and physical location were found to be positively related to higher degrees of competition amongst hotels (Baum & Mezias, 1992). This study argues that attractions with similarity in the themes of their products are also relatively more likely to be in competition with each other. Other important factors, including indoor versus outdoors facilities (as wet or dry weather can turn allied attractions into competitors), patterns of ownership (Swarbrooke, 2001), and historical reasons for becoming a visitor attraction (Wanhill, 2006) are beyond the scope of this study.

Competition, competitiveness and spatial proximity between visitor attractions

At the regional scale, the degree of spatial proximity amongst attractions broadly relates to levels of agglomeration (the ratio between the number of firms and the size of a particular area). Agglomeration (at the regional scale), and spatial proximity amongst individual attractions at the local scale (between individual neighbouring attractions) determine the levels of inter- and intra-cluster competition i.e. competition (or cooperation) between regional groups of attractions, and competition amongst individual firms within clusters (Wang & Krakover, 2008). Firms within a region both compete and cooperate (Newlands, 2003) as spatial proximity is positively related to intensity of competition (Tsang & Yip, 2009) and often compete for short-haul markets but cooperate in long-haul markets because they recognise the synergistic effect of cooperative marketing (Wang & Krakover, 2008). In other words, intra-cluster tourism firms are likely to compete more for local markets and less for distant markets. This paper argues that, at the regional destination cluster scale, agglomeration amongst visitor attractions tends to be negatively related to levels of inter-cluster competition with other clusters of attractions, while at the local scale, spatial proximity between individual intra-cluster attractions tends to be positively related to levels of competition.

Spatial proximity and agglomeration are also examined in terms of implications for developing business strategies to secure a competitive and comparative advantage relative to other attractions. The competitive advantage of a tourism destination is determined by its skills, technology branding and strategic management (Lade, 2010), and relates to the ability to use resources effectively over the long term and to mobilise and deploy resources efficiently compared to other destinations using an efficient marketing strategy (Crouch & Ritchie, 1999; McIntosh, Goeldner, & Brent Ritchie, 1995; Ritchie & Crouch, 2003). This

consists of five elements: an audit or inventory of resources, maintenance, actions for growth and development, and efficiency and effectiveness of resource deployment (Crouch & Ritchie, 1999).

Being spatially separated, linked, or isolated can be crucial in competitive and collaborative behaviour. A comparative advantage can be built by developing a strong and differentiated image (Ritchie & Crouch, 2003). For example, a new visitor attraction may be located in a remote location in order to incorporate an outstanding environmental setting into its image. Similarly, existing attractions may have the option (depending on product) to relocate so as to improve accessibility to markets. A central location, with strong market access, enjoys two significant competitive advantages over remoter destinations with poorer market access. First, it attracts those who want to minimise travel time and maximise time at the destination, and secondly, potentially allows them to capture some market share from visitors en route to remoter destinations (McKercher & Lew, 2004). The linkages between competition, competitive strategies and space underlie the concept of spatial competition and suggest two competition strategies that incorporate the user of space, as discussed below.

'Strong' and 'weak' competitive strategies

One way for a firm to gain or retain competitive advantage is to innovate and differentiate itself. 'Strong' strategies are based upon quality, product differentiation and product innovation, emphasising dynamic disequilibrium and chronic and deliberate disturbance of a market (Hudson, 2001; Shaw & Williams, 2004). Firms may develop advanced technologies and new products, requiring them to develop particular and unique markets for their products (Hudson, 2001). Accessing and implementing new technologies may require relocation, but this is not always possible, where the attraction is based on locationally specific products or specific place associations.

In 'weak' forms of competition, characterised by price competition within a given technological-organisational paradigm, companies seek to reduce production costs (Hudson, 2001; Shaw & Williams, 2004). Location within a cluster is one way to reduce costs, through positive external economies of scale associated with local availability of skilled labour, research facilities, the existence of local ancillary industries and specialised services (Johnston, Gregory, Pratt, & Watts, 2000). Shaw and Williams (2004) argue that attractions implementing 'strong' strategies compete by introducing new products and even collaborating with others in developing new products. Extending that argument, this paper argues, first, that visitor attractions may prefer to liaise and market themselves with extra-cluster rather than intra-cluster attractions, and/or position themselves as a more distinctive tourism experience compared to other attractions within the cluster; their aim is to retain their competitive advantage and avoid spillovers of innovative ideas and technology to local competitors.

We argue that a peripheral or edge-of-cluster location can endow attractions with advantages in implementing a strong competitive strategy. Firms employing 'weak' strategies or competition within the same paradigm (Shaw & Williams, 2004) may also collaborate with similar attractions in other clusters, which do not pose a threat to their market share. Thus the distinction between 'weak' and 'strong' competition has to be understood as schematic rather than as a strict dichotomy, as firms engage in many different strategies within each of these generic types as well as combining both (Shaw & Williams, 2004), making locational decisions and outcomes necessarily complex.

Methodology

The study focuses on two, relatively spatially discrete clusters within Cornwall: the Lizard and Newquay (Figure 1), with contrasting levels of agglomeration. The co-location of

service firms which co-produce the tourism experience in contrasting conditions of spatial proximity provide a framework for analysing key aspects of spatial competition including the following research questions:

1. Does agglomeration amongst visitor attractions tend to be negatively related to levels of inter-cluster competition at the regional destination cluster scale?
2. Does spatial proximity between individual intra-cluster attractions tend to be positively related to levels of competition at the local scale?
3. Are visitor attractions at a peripheral or edge-of-cluster location more likely to implement a 'strong' competitive strategy?
4. Are visitor attractions at a central location within tourism clusters more likely to employ 'weak' competitive strategies?

In line with previous studies (Dončić, Horvat, & Šmid, 2007; Jackson & Murphy, 2002, 2006; Novelli, Schmitz, & Spencer, 2006), evidence from primary and secondary data, (9 interviews with key informants as well as tourism associations' websites, tourism leaflets, advertisements and guidebooks), provided the basis for selecting the clusters, and for delineating their boundaries for research purposes. First, maps in regional associations' websites were used to identify the attractions, located within their boundaries (regardless of association membership). Second, key informants were asked to name the attractions, which are perceived as within 'their area' or their 'neighbours'. Most of the key informants named attractions whose locations were within the borders of the areas delineated by the above maps.

The study areas are broadly similar in size, and are situated in South West England (Figure 1). The Newquay research area contains more visitor attractions at higher density than 'the Lizard', while both are of similar area size of, about 230 sq km. The Newquay cluster contains more visitor attractions at a higher density than the Lizard Peninsula.

Newquay is more accessible to both public and private transport with almost a third of visitor attractions is located within the town and the rest close to the A30 trunk road to Cornwall and the South West. The towns of Helston and Gweek in the Lizard are less frequently served by buses than Newquay, which is also served by a train. Further, the average minimum travel distance and time by road between each pair of attractions is shorter in Newquay (20 minutes and 7.1 miles) than the Lizard (37 minutes, 9.33 miles) (Automobile Association data, 2008). Newquay brands itself as the capital of watersports and surfing, and its main attractors include beaches, and rural and maritime landscapes tailored for families and water-based recreation (Restormel Borough Council, 2005). The Lizard's main attractions are a relatively undeveloped coast, and a mix of attractions (heritage and garden attractions and a theme/fun park).

For the purpose of this study, a visitor attraction was considered to be a permanently established excursion destination that charged admission for the purpose of sightseeing, entertainment, interest, or education, rather than being *primarily* a retail outlet or a venue for theatrical, film or sporting performances; it had to be open to the public, and attract mostly tourists not local residents. Many attractions belong to the not-for-profit sector, and have broadly similar operations to commercial operators, particularly those charging admission, and their success is often interpreted in terms of visitor numbers and financial viability (Wanhill, 2006). Therefore, public, private and voluntary sector attractions were included if they charged entrance fees and were small and medium size enterprises, i.e. having between 10 and 499 employees.

Qualitative data from in-depth interviews with a sample of visitor attraction managers in Newquay and a sample of managers from the Lizard were used to examine the research questions as well as a snow-ball sample of key informants (tourism officers, councillors and

policy makers). All appropriate attractions in Newquay and the Lizard were invited to participate in the study and their product type and density are summarised in Table 1.

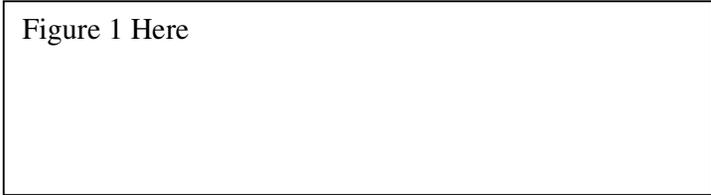
Table 1

All attraction managers in the Lizard cluster (10) agreed to be interviewed and in the Newquay cluster, three managers declined to be interviewed, resulting in a sample of 13 attractions (out of 16). A form of ‘framework analysis’ was performed on the interviews with the 9 key informants and the 23 attraction managers (Waitt, 2003), which included the procedures of familiarization, classification, and indexation; this allowed the identification of different themes and their coding using Non numerical Unstructured Data Indexing Searching and Theory-building (NUD.IST). The use of NUD.IST for coding allowed building a tree-like interrelated structures, resulting in identifying the important relevant concepts. Different examples of competitive strategies were coded and categorised using geographic scales (e.g. lower or higher levels of agglomeration and/or spatial proximity at the regional and local scales respectively).

Interviewees were asked (between February and October 2006) about the characteristics of competition with other attractions including the identity of their competitors and that of their ‘biggest’ competitors, the role of spatial proximity and product similarity in competition with other attractions and the obstacles to being competitive. When managers were unsure about the area included in the term ‘proximity’ or ‘local area’, the interviewer clarified that the reference was to Newquay or the Lizard. Every listed competitor was classified by type of attraction or business, thematic-product similarity (thematic similar, dissimilar) and location (i.e. intra or extra cluster) relative to the attraction under

consideration. The levels of competition between individual attractions reflected attraction managers' responses. Levels of competition amongst intra-cluster attractions, including their product theme and spatial relationships with other attractions, were mapped (Figures 2-3). Where two attractions both considered themselves to be each other's 'main competitor', this is marked by thicker arrows in these figures.

Figure 1 Here



Competition amongst visitor attractions in Newquay and the Lizard

There was a high level of awareness of competition issues amongst the attraction managers and three themes emerged: the nature and type of competition, and the 5 levels for studying competition among tourism firms (Buhalis, 2006). The following sections examine the relationships between spatial proximity and levels of competition, and the differences in themes between the clusters.

Nature and type of competition

Competition included that with neighbouring similar-thematic attractions as well as competition with shops, pubs, and supermarkets (Swarbrooke, 2001). Interviewees recognised various forms of competitors, with competition focussed on suppliers and labour, the latter being particularly important given the role of staff in co-producing tourism experiences. Interviews were undertaken in 2006 before unemployment rose following the 2008 financial crisis and government austerity policies, which effectively reduced the competition for labour.

In line with Buhalis (2006), competition in both clusters was mainly for markets, i.e. for visitors' time and money, as indicated by an amusement attraction manager in Newquay:

...the biggest one [competition] is sharing your time and money with other attractions. The visitor only has a certain amount of disposable income and a certain amount of time available, so it is time and money. ...if they go to the [nearby farm attraction] and it costs them 25 pounds and then they come here and it's another 25 pounds, they might say well, I have already spent my 25 pounds... the competition is on time. The time that people spend in your attraction. Or, the competition is the time they're spending in someone else's attractions when they should be spending it in yours...there are only so many hours in a day and therefore people can only go to a certain number of attractions, and they've only got so much money in their pocket so it'll affect it through time and through available finances.

Attractions not only compete for visitors but also attempt to retain them on site as long as possible, to maximize spending on ancillary services and products, such as food and souvenirs. Food and catering were important, being an inextricable part of the tourism product, as well as objects of competition. The importance of competition for suppliers was indicated by a key informant from a regional agency, who emphasised that "they [visitor attractions] always want a better deal to beat their neighbour".

Competition with other businesses (especially retail outlets) for visitors was a major concern to attraction managers in both areas:

...any business is competing with anyone, even clothes shops because we're all trying to get people through our doors and we're not trying to get any particular types of person because we feel we are appealing to a broad range of people...if someone went to buy a surf board, that might negatively affect their decision to visit an attraction. holiday-makers make up 80% of our visitors, and they're only going to have a certain amount of money to spend within their two weeks, , then potentially, all other places that are selling them products, shops, bars restaurants etc, potentially are all our competitors" (an animal attraction manager on the Lizard).

However, competition with other attractions and businesses was not only for visitors and over suppliers, but also for labour; "...you're always in competition for the workforce with shops and with the labour market [generally]" (Amusement park marketing manager). In Newquay

competition for labour with other attractions or businesses is less acute than on the Lizard.

Competition is with:

... not so much attractions but more like shops and businesses around town because so many people come into Newquay looking for bar work and cafe ... if you're looking for a chef, or a skilled individual it can sometimes become difficult because you might interview someone, like them and offer them the job, only to find they've found work elsewhere' (An animal attraction manager on the Lizard).

These findings are somewhat contrary to those of Buhalis (2006), who criticises tourism firms for their failure to understand the global nature of competition, including the fact that they compete against a range of alternative leisure options for consumers' time and money. However, they are commensurate with the 5 'levels' he proposed, suggesting these can also be applied to visitor attractions. Attractions faced competition from similar-product attractions in their proximity and from service providers, such as food outlets and even supermarkets, and they developed 'co-opetition' strategies and collaboration at the destination regional scale (level 1). The fact that some attractions saw competition as inter-regional with overseas, for example Mediterranean destinations, reveals the importance they attach to competition from similar or undifferentiated destinations, that are easily substitutable and could capture market share at their expense. One of the main motivations for collaboration is branding and development of collective differentiation (Buhalis, 2006). Nonetheless, some attraction managers claimed they had no, or almost no competition, particularly those on the Lizard. Some of these attractions' managers considered their natural and socio-cultural features were unique and non-substitutable.

There is less indication of competition within distribution channels. These were mentioned by two garden attraction managers on the Lizard, who said that "... we do compete on coach tours, yes. We don't give backhanders but sometimes you can give coach drivers quite serious backhanders". Another garden manager on the Lizard saw coach operators as an obstacle to competing with other attractions; "...You knows, if a coach

operator is only going to visit, shall we say a finite number of gardens and attractions, and they decide to go to another one and not us, then we've lost that coach. So in terms of volume of business, that's probably the most problematical''.

Spatial proximity/agglomeration and competition

Competition for visitors was strongly influenced by distance and travel time between attractions. As the tourism experience involves time, distance and travel time are major factors in competition. A marketing manager of an amusement park on the Lizard argued that "...Cornwall is actually a relatively small area. So obviously, distance does affect the competition. I don't think anybody would drive 72 miles to come here, really, in the summer, with bad roads and your children in the car. So yes, this is a major factor''. Similarly, a key informant explained that "people don't always want to drive long distances from one attraction to another especially now when fuel had become so expensive. If you have driven 300 miles to get here, whoever does the driving here doesn't want to have to drive 50 or 60 miles every day to an attraction''. His argument is particularly germane to understanding competition between intra-cluster attractions at the local scale.

Some interviewees considered that spatial proximity and the agglomeration of visitor attractions had a positive influence on competition (Table 2) "...because it keeps them on their toes. They have to stay competitive and they have to look at their product each year. It's the further distance that actually makes people more complacent'' (key informant). This respondent illustrated his argument by talking about two competitors:

...they were out and out competitors and they always wanted to beat others' figures, which meant they always did incredibly well because it meant they always stayed on their toes. You know, a bit of paranoia that your competitor is out to steal your customers is very good at making you stay competitive.

Table 2

More than half of the ‘biggest’ competitors and most of the ‘other’ competitors in both study areas are intra-cluster attractions (Table 2). Spatial proximity at the local scale also influences competition for labour; for example, a wildlife attraction manager on the Lizard indicated that the three closest neighbouring attractions ‘tend to be our chief labour competitors’. However, less than half the key informants thought that spatial proximity between attractions was associated with intensified competition. Some interviews did not give a clear answer to this question, and a few thought there was no impact.

Proximity and agglomeration amongst attractions do play an important role in competition. Given that most tourists have limited time budgets they tend to concentrate their activities within particular areas, such as the clusters studied here. This has a dual effect. First, it intensifies intra-cluster local competition between individual neighbouring attractions competing for labour and tourists who only visit a limited number of attractions in a short time period. This is not necessarily seen as negative because it is a driver of attempts to increase competitiveness. Even if this was a zero sum game in relation to other attractions within the cluster, it has implications for competition with attractions elsewhere. Secondly, agglomeration increases awareness that competition is with firms which collectively produce the tourism experiences of tourists staying in or visiting the cluster, i.e. of mutual inter-dependencies.

Differences between clusters

Table 2 presents the differences between the two clusters in terms of type of competition.

Competition for labour was mentioned by almost half of the attractions on the Lizard but by none in Newquay. Most interviewees did not compete for suppliers, but:

...some of our suppliers...might contribute to our point of sale for our catering and that's very valuable. We can get our message across to our guests...that it is good quality food, maybe local food...and that increases our sales...now that is a definite business advantage to us. So I would not be talking about that to my competitors (a Newquay amusement attraction manager).

Similarly, a key informant (tourism officer), argued that "...there can be a fair amount of competition in securing the best deal from like, ice cream suppliers". A key informant explained why an edge-of-cluster location, with relatively lower levels of accessibility - is disadvantageous in competing for labour:

If you think about [an attraction in the centre of the Lizard cluster], I mean, if you live in Helston, you can walk here, but if you wanted to work in [an edge of cluster attraction on the Lizard], then the only way you can get up there is by car. The more isolated an attraction is, the more difficult is for them to get labour.

The more dispersed attractions' managers on the Lizard complained more than Newquay attractions' managers about their distance from major urban areas, indicating that it was disadvantageous. Therefore, high agglomeration is considered to provide a competitive advantage by facilitating an increase in tourist numbers, even though being located in the centre of a cluster arguably increases competition.

All the Newquay attractions' managers perceive other intra-cluster attractions to be competitors unlike on the Lizard (Table 2, Figures 2-3). The fact that some attractions on the Lizard perceived no other intra-cluster attraction as being a competitor also indicates a low-key competitive business cluster environment. Competition amongst attractions was considered to be a major obstacle to running a business by some attraction managers in Newquay, but not by any on the Lizard.

One amusement attraction manager in Newquay criticised how competition is understood, complaining that: "...a lot of people in Cornwall don't see you are actually

trying to get people to the County. It is not competition, it is all about bringing people to the County, (but) many attractions don't see it that way. They see it as a doggy-dog fight you know''.

Conversely, competition on the Lizard is perceived to be more at the inter-regional scale (Cornwall County), with extra-cluster attractions located all over Cornwall and/or with other tourism regions nationwide (Tables 2-3). One Lizard attraction manager, referred to other regions nationally and internationally when asked about competition with other attractions;

So the competition as we in Cornwall have is in encouraging people to come to Cornwall. And those people have to make a decision; what do I do? Do I want to go to Cornwall or do I want to take a plane and fly to Malaga. It is all about them making a decision about the region they are going to go to ...

Table 3

Another attraction's marketing manager made the same point when criticising those who think attractions compete on the Lizard; `...when they talk about competition, they'll say that [my attraction] is competition. There's no such thing because we're all part of a tapestry and we're all in this game to get people into Cornwall'.

A comparison between two similar size central wildlife attractions in Newquay and the Lizard shows a clear focus on extra-cluster competition on the Lizard compared to competition with intra-cluster competition in Newquay. The manager of a private attraction in the Lizard employing 12 permanent staff looked at competition from "...Cornwall perspectives, as people generally don't come to Cornwall just to go to an attraction. They come to Cornwall for the Cornish experience. Therefore, 'our other competitors are the cheap flights abroad.... so our competitor is the cheap Easyjet flight to Malaga or whatever". The manager of a wildlife attraction in Newquay, employings only 8 permanent employees, identified mostly other intra-cluster wildlife attractions in Newquay cluster as main competitors as well as other attractions, which are 'Newquay Attractions Trail [marketing

association of attractions in Newquay] members, and other Cornish association of visitor attractions members. While the attraction in Newquay competes mostly with its neighbours, the one in the Lizard focuses not even with other attractions in Cornwall at the regional scale, but with other overseas destinations (Table 2).

A comparison of intra-cluster and inter-cluster competition reflects the influence of spatial proximity, agglomeration and product-thematic similarities at the local and the regional scales (Tables 2-3). Product-similarity is inseparable from spatial proximity at the local scale, and from agglomeration at the regional scale, in terms of interviewees' understanding of competition. However, each of these factors was considered to be positively related to competition amongst attractions. Although it seems logical to assume that spatial proximity between businesses in the same industry, regardless of their similarities, is likely to intensify competition, none of the managers on the Lizard, and only a few in Newquay, thought that spatial proximity increases competition (Table 1). This is consistent with most Lizard attractions not considering other neighbouring attractions as being competitors (Table 2). **In terms of the first research question, concerning whether there is a positive relationship between agglomeration and levels of inter-cluster competition at the regional scale, the evidence suggests negative relationship rather than positive as had been expected according to the argument set out in the conceptualization of the paper. Regarding the second research question, the evidence shows a positive relationship between spatial proximity between intra-cluster attractions at the local scale, which is consistent with the conceptualised argument in the paper.**

Some major obstacles to being competitive were mentioned in both areas. Many managers complained about a limited budget for marketing, and for investing in product, facilities and services, as well as about labour, taxes, insurance, and other increasing costs. Accessibility and transport (including access to the major road network, congestion, and absence of road signage and posting) were perceived to be major obstacles to being competitive as well as being located within a small catchment area distant from holiday

parks. A few managers complained about not having enough space to expand their facilities such as parking. More attractions on the Lizard than in Newquay mentioned distance from major cities and other significant potential markets, as an obstacle. Some of these obstacles are related to locational factors and impact on the competitive approaches as discussed below.

‘Strong and ‘weak’ competitive approaches in Newquay and the Lizard

There is some support for the argument that location is a significant source of competitive advantage, particularly within a cluster. Differences between the clusters in terms of type of competition (Table 2) reveal that, on the Lizard, three garden attractions located at the edge of the cluster demonstrated ‘within changing paradigms’ (Shaw & Williams, 2004) or ‘strong’ competitive strategic approaches (Hudson, 2001). Compared to other attractions, they had an implicit preference for increasing niche markets over the mass market. Most attractions in the Lizard cluster focus their marketing on as many market segments as possible through joint marketing with other attractions. Two out of the three gardens target their marketing at particular (niche) market segments through joint marketing initiatives with other gardens, using on-online marketing websites. This indicates differentiation in their marketing strategy, which is typical of a ‘strong’ competitive approach. The peripheral locations of attractions within the relatively less dense tourism space of the Lizard are considered to attract fewer tourists and provide more differentiated products endowed by the special ambience of the localities. as implied by one of the managers of a garden attraction on the Lizard;

People go to Cornwall and people go to Newquay. Because they go to Newquay, they stay in Newquay. Thanks god they do ... the types of audiences are completely different. Most people when they come to Cornwall come to Newquay and in turn, we sort of don’t want the theme park people. It’s like chalk and cheese.

The presence of other tourists was considered to detract from the ambience this attraction offered visitors. A garden manager on the Lizard explained that his and other

gardens "...look at niches, such as family groups, people interested in gardens and heritage, people who are interested in good walks, that's the target'. When asked for his view on seeking new markets, such as families who normally `...don't really come for gardens, they come for theme parks like Flambards' (interviewer), he promptly replied: "I don't want them!'. In the more highly clustered mass tourism space of Newquay, attractions employ 'weaker' competitive strategies. None of these, including those in edge-of-cluster locations, was identified as employing a 'strong' competitive approach. They all sought to attract as many visitors as possible without any preference for a particular segment. A location within a dense cluster endows a competitive advantage by not being over-reliant on narrow market segments. The owner/manager of a mass heritage visitor attraction, in the centre of Newquay, appreciated the contribution of its locational advantage to being competitive:

"We're in a town centre location with a public car park right opposite us and in times of inclement weather, it attracts the holiday-maker to the towns in Cornwall and Newquay is the highest populated tourism town with the widest tourism catchment area and is seen as the centre of tourism for the whole of the County".

In contrast, a manager of a thematic-technological attraction on the Lizard noted that "...we are perceived by the masses as being in a remote location. We are roughly out on our own down here. We are not in a cluster of other attractions... it is a negative aspect of where we are based...our location is a disadvantage". **Therefore, in terms of the third and the fourth research questions, the evidence suggests that visitor attractions at central locations within their clusters are likely to employ 'strong' competitive strategies and those at central locations are more likely to employ 'weak' competitive strategies .**

A remote location is a negative factor for an attraction that aims to draw as many visitors as possible. However, the marketing manager of a garden on the Lizard, that also includes historical features, provided a different perspective:

".... we're not going to introduce a zoo or anything like that in here because that's not what [the garden] is about. It is about peace, tranquillity and the historical nature...They [visitors] come to escape that. They don't want to come here to find fair grounds or

amusement parks or anything like that, they want the peace and tranquillity that [this attraction] offers... The countryside, the views and the history”.

Thus, a relatively remote location can be both a source of differentiation and an element in a ‘strong’ competitive strategy, which provides some evidence to support the third research question regarding the tendency of visitor attractions to prefer implementing ‘strong’ competitive strategies.

These findings need to be treated cautiously, as gardens for example, may not be typical of other types of attractions. Furthermore, as noted earlier, the distinction between ‘weak’ and ‘strong’ forms of competition is more schematic than a strict dichotomy (Shaw & Williams, 2004), and attractions in Newquay and the Lizard clusters engaged in both strategies simultaneously. None of the interviewees who preferred niche markets thought their attraction was solely aimed at niche markets but appealing to wider audiences as well. In Newquay, for example, some attraction managers were concerned about competing with other attractions in terms of product quality (Table 2), as most attractions in Newquay have similar competitors and they need to distinguish themselves from their neighbours. They were more innovative than the Lizard attractions in using more external suppliers for enhancing existing products and introducing innovations from national and international operators. This is associated with a ‘strong’ competitive approach and the notion that industrial clustering increases competitiveness and levels of innovations (Porter, 1998).

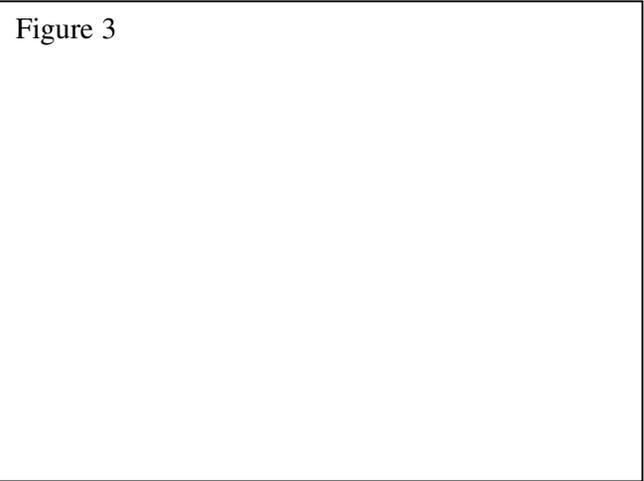
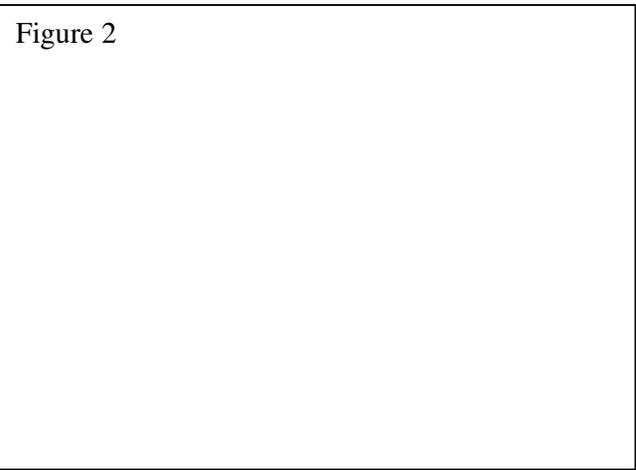
Product thematic similarity and competition

Another factor explaining differences in local competition in the two clusters is the extent to which thematic-product similarity influences the competition amongst individual intra-cluster attractions at the local scale versus the regional scale. More than half of the managers of Newquay attractions identified their main competitors as being intra-cluster and product

similar, whereas on the Lizard competition is considered to emanate from the rest of Cornwall and dissimilar attractions (Tables 2-3). Figures 2-3 illustrate the spatial organisations and spatial relationships amongst attractions in the Lizard and Newquay.

A high degree of thematic similarity increases direct competition for the same visitor markets amongst neighbouring attractions. This can be seen as being contrary to 'healthy competition', which includes co-opetition between attractions, and allows attractions to achieve external economies of scale (Huybers & Bennett, 2003; Malmberg & Maskell, 2002; Wang & Krakover, 2008). For example, two similar intra-cluster wildlife attractions in Newquay were in a 'heavy bad feeling competition' mentioned by both managers, who had similar views regarding the relationships between product similarity and competition. These attractions are so proximate and similar that visitors often confuse them and visit one when intending to visit the other.

In this case, a 'weak' competitive strategy could involve a radical change in the product theme to increase dissimilarity between two proximate attractions. Conversely, a 'strong' competition strategy implemented through relocation of one of the attractions to a more distinct and/or remote location could result in improving the competitive advantage of both attractions through new product development driven by new locational attributes, such as cleaner environment and scenery. These do not necessarily involve radical innovation but even some minor improvements and rebranding. High levels of thematic similarity in tourism clusters intensify competition and more dissimilarity and complementarities between attractions engender 'healthy competition'.



Summary and conclusions

This paper has explored the relationship between clusters and (spatial) competition in the tourism industry by examining competition and competitive strategies amongst visitor attractions in two clusters possessing relatively low and high levels of agglomeration and thematic similarity respectively. It paid particular attention to spatial proximity, thematic-product similarity and competition between attractions at intra- versus inter-cluster scales, as well as the interrelationships between location and competitive strategies. The findings were broadly in accord with those of Middleton and Clarke (2001): competition was mainly for markets, (visitors' time and money), and attractions concentrated both on attracting tourists and maximising visitors' time on site, in order to maximize spending on ancillary products and services.

There were indications of competition for labour, particularly among attractions at lower levels of agglomeration, which suggests a relative disadvantage of this type of cluster. Major obstacles to being competitive in both clusters included competition for grants, public funds, lack of funds for marketing, and investment in product facilities and services. Other obstacles included taxes, and the availability of labour – the latter is particularly important given the role of staff in co-producing tourism experiences. In addition, attractions compete for customers with other service outlets such as shops, pubs, restaurants and even supermarkets (Middleton and Clarke, 2001).

Several factors including the co-location of production and consumption, sensitivity to market location and product similarity determine the role of location in the competitiveness of customer service firms. Other locational factors which constitute a comparative advantage, including distance from major cities, accessibility, environmental settings, can also be used in developing a comparative advantage and should be considered

when employing competitive strategies. Product similarity between proximate individual attractions is associated with higher levels of competition at the local scale. These attractions could differentiate their product and/or develop product complementarities to avoid direct competition for visitors and develop synergies of appeal (Weidenfeld, Butler, & Williams, 2010,2011) or alternatively relocate to a more distant location. In contrast, the agglomeration of visitor attractions is negatively associated with regional competition, and competition with distant extra-cluster attractions. Thus Newquay's attractions' managers considered they faced fiercer competition locally (intra-cluster competition) than the Lizard's, while the latter were more likely to consider their competitors were similar extra-cluster attractions elsewhere in the County and in the South West, not neighbouring intra-cluster attractions. Unlike attractions in Newquay, they demonstrated low levels of competition, both locally and regionally, and relatively strong cooperative relationships at the regional cluster scale, underlining the mutual dependence of tourism firms in their collective production of the tourism experience designed to feed into customer loyalty and repeat visits. Here it is apposite to note that agglomeration economies demonstrate the benefits of high levels of agglomeration for visitor attractions in terms of local competition for labour and regional competition for markets. Greater availability of more mobile labour in a more agglomerated tourism space eases competition pressures.

Other factors relevant to competition for labour are public transport and road access, which also favour areas with high levels of agglomeration. The differences between the two tourism clusters, the Lizard and Newquay, in the nature and levels of competition can also be related to thematic similarities in the attractions' core products. Newquay's attractions are more product similar and operate at higher levels of agglomeration, and therefore face more competition locally, which is reinforced by the greater similarity amongst them as well as by the spatially bounded activities of most tourists. Conversely, the Lizard attractions are more

dissimilar, more dispersed, and thus less face less competition locally, but more so regionally. Overall they demonstrate a low-key competition environment, both locally and regionally, compared to Newquay.

This research did not study the historical locational decision-making which has led to the current locations of these visitor attractions, nor their dynamics. However, there is evidence of the relationships between the spatial locations of attractions and the competition strategic approaches utilised, i.e. 'weak' or 'strong'. Visitor attractions employed both 'weak' and 'strong' competition approaches simultaneously in both clusters. On the Lizard there was some indication that edge-of-cluster attractions adopted a 'stronger' competitive approach than other attractions in both clusters, using location as a part of their competitive strategy to attract specific visitor segments. This suggests that there are linkages between spatial location and competitive strategy, and that product similarity amongst attractions encouraged attractions (in Newquay) to be more focused on product quality as a means to increase visitor numbers.

The study indicates that location may be used not only as a comparative advantage, but also for building a competitive advantage by developing a strong and differentiated image. 'Weak' or 'strong' locational strategies can be germane to other service firms, (such as those in retailing, catering and shopping), where production and consumption co-locate. Service firms may decide to employ 'strong' competition strategies by locating (or relocating) remotely in order to attract new and niche markets, rebranding themselves as distinct or reinventing themselves using locational amenities for new product development. By contrast, service firms situated in peripheral locations may relocate centrally in an attempt to employ 'weak' competition strategies aimed at reducing operational costs, improving accessibility to markets and collaborating with other cluster actors. For example, relocation of edge-of-cluster attractions could, by achieving external economies of scale, overcome the

obstacles, perceived by managers as barriers for obtaining competitive advantage, including a restricted budget for marketing and investing in new product development, facilities and services, as well as improving availability of labour.

A number of limitations of the study have to be noted. First, the data extracted from visitor attractions' managers in both clusters is limited as not all were able or willing to release sensitive information. Second, the study has focused on marketing, related to the concept of spatial competition such as pricing, labour, local monopolies and ownership, more than on other management aspects. Third, this study examined only two tourism clusters in one region in the United Kingdom, and while this facilitated the comparison, more examples are needed to study the use of location as a tool in employing competitive strategies in general and in other sub sectors of tourism and the service industries, such as retail and catering. Fourth, the empirical data for this study were collected in 2006, before the global economic crisis which commenced in 2008. Market and investment conditions have changed significantly subsequently, so that many attractions are facing static or even shrinking markets, and raising funds from the financial sector has become more difficult for both new entrants and existing attractions. In effect, competition has intensified while the means to develop new competition strategies have been constrained.

Further research, involving different methodologies, including quantitative data, and more in-depth case studies are required to provide further insights into competition in the attraction sector as well as to the acute competition between attractions and other businesses in the tourism, leisure, catering industries and retail outlets mentioned by some interviewees. Further studies are required on the relationships between local and regional clustering and competition among consumer service industries, including tourism, as well as the features of spatial competition, including the use of location in competitive strategies, in order to extend

knowledge of the relationships between space, competitive strategies and competition in the service industries.

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