Title: Cultural tourism clusters: experiences from Ireland

Introduction

The very concept of cultural tourism suggests that there is a symbiotic relationship between the arts and tourism, and that opportunities for cluster development abound. In fact, relationships between artists and travelers have existed for centuries. The concept of 'cultural tourism' is said to date from the beginning of the 17th century when an educated, wealthy elite undertook the Grand Tour (Towner, 1984). However, it is only recently that governments have begun to recognize the value of supporting cooperative activity between tourism and the arts. This chapter presents a case study of a cultural tourism cluster in the South-West of Ireland. The research illustrates some of the opportunities and problems that small communities encounter in their attempts to develop cultural tourism. Conclusions are drawn regarding the potential of clustering to support, or hinder, the achievement of arts and tourism policy objectives. The authors conclude that cultural tourism clusters are valuable, but they are not the panacea to local economic development that public policy makers suggest they are.

Cultural Tourism

Cultural tourism, as a sub-discipline of tourism, is attracting increasing interest in the social sciences (Gibson and Connell, 2003; Richards, 1994; Urry, 1990; Ivanovic, 2009). According to the World Tourism Organisation (2004), cultural tourism involves an immersion in, and the enjoyment of, the lifestyle of the local people, the local area and its identity and character. It encompasses the performing arts, festivals and events, visits to sites and monuments, study tours and pilgrimage travel. Tourism bodies see culture as a means to secure a unique advantage in a competitive marketplace (Getz, 1991; Zeppel and Hall, 1991). Around the world, state bodies have funded heritage trails, produced festival and events guides and disseminated information on ancestry (Getz, 1991; Richards, 1994; Zeppel and Hall, 1991). Visits to a country of one's ancestors is associated with both the consumer's history and sense of place and represents a merging of the real and imagined (Herbert, 1999, p.77).

Music has become part of a branding and destination marketing strategy. Music has the power to transform certain places, as a result of the images and associations with

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place which are captured in lyrics and in the connections generated between artists and bands or the whole music 'scene' (Gibson and Connell, 2003). As regards Ireland, the growth in the Irish diaspora created a new audience for music and dance (Kearns and Taylor, 2003); the music appeals not only to large immigrant communities, but to the world market (Smith, 2001). The increasing pace of life and commercialisation of societies is used to explain the growing interest in traditional music (Kneafsey, 2002). Music and dance are signifiers of national myths and stereotypes and shape tourists' expectations (Nicholls 2000; Strachan and Leonard, 2004).

According to Hughes (2002), tourism supplies extra audiences for the arts, so tourist boards actively foster relationships with art managers through publications, seminars and best-practice case studies. For those who produce arts events, tourism can be a means of supporting and developing regional arts (Paleo and Wijnberg, 2004; Mackellar, 2006). Cultural tourists, like any other, require food, accommodation and transportation. Museums and art galleries are expected to meet the needs of visitors by providing visitor information sites, parking, tea rooms and other services. It is axiomatic that retailing, art and culture are part of the overall tourism industry. Governments tend to support entrepreneurial activity in the arts such as the start-up of an arts and craft enterprise, packaged tours, and so forth. However, the literature suggests that the drawing power of the arts is easily overestimated. According to Hughes (2002), the performing arts are important in drawing tourists to a destination, but there are other reasons for travelling to a destination such as the weather, scenery or heritage.

The consumption of culture remains a highly discretionary activity in economic terms and one that is purchased only after more basic needs have been met (Bull, 1995). Cultural tourists are regarded favourably as they are affluent, well educated, broadly travelled and in more mature age groupings (Holcomb, 1999; Michael, 2007). Cultural tourists come to a destination in search of authenticity and meaningful experiences (Urry, 1990). They often seek to participate in experiences related to a particular hobby or recreational interest (Hall and Weiler, 1992). For arts organisations, and indeed many other organisations, the capacity to 'produce pleasure' is a dimension of the user's experience (Campbell, 1989). Hedonic consumption,

which plays an important role in the performing arts, relates to the "multi-sensory, fantasy and emotive aspects of one's experience with products" (Hirschman and Holbrook, 1982, p.92). Traditionally, arts organisations have been producer-led or arts-centred (Lampel, Lant and Shamsie, 2000) but there is increasing evidence that arts organisations are adopting a more customer or audience-driven focus and attempting to meet tourist demand (Kennelly, 2005).

The cluster concept and its relevance to tourism destinations

Cluster theory is strongly associated with Michael E. Porter (1991). Porter (1991; 1998), drawing on the work of Alfred Marshall (1890), developed his diamond model which provides a broad framework for the analysis of successful regions. He argues that four factors interact and produce a cluster, which are: firm's strategy, industry structure and rivalry; factor conditions; demand conditions, and related and supporting industries. Two other factors, chance and government lie outside the diamond model, but influence the business environment in important ways. A key feature of Porter's cluster concept is that location is a significant explanation of competitive advantage and is something that competitors outside the cluster are unable to imitate. Porter (1998: 78) states:

> "Critical masses – one place – of unusual competitive success in particular fields…clusters are geographic concentrations of interconnected companies and institutions in a particular field. Clusters encompass an array of linked industries and other entities important to competition."

Successful clusters are characterised by access to skilled labour and high quality suppliers; supportive institutions and improved access to specialised training and information; exposure to sophisticated buyers at a local level; innovation through visibility and proximity; lower risk of business failure and higher rates of new business formations (Porter, 1990; Malmberg and Maskell, 2002; Rosson, 2003).

The cluster concept and tourism

Despite the substantial literature on clusters (see Lindequist and Power, 2002 for a review), its merits and shortcomings (Martin and Sunley, 2003), research into the

existence of cultural tourism clusters is sparse. Scholars have long noted the tendency for musicians and artists to cluster together (Florida and Mellander, 2008; Braunerhjelm, 2005; Rosenfeld, 2004). Scholars highlight the importance of a creative milieu (Florida, 2002) and the potential for in-migrants to develop enterprises and foster the translocation of capabilities. Clustering of cultural activities tends to be associated with cities with the result that cluster formation in non-urban areas has been neglected. Michael (2003: 136), in a paper on tourism micro-clusters in rural Australia notes that: "the Porterian approach has been demonstrated in macro-regional analyses, but little has been done to apply these concepts in small regional environments." He argues that clustering helps create economic and social opportunity in small communities. Irish cluster studies have been undertaken into the software, dairy processing and music sectors (Clancy, Malley, O'Connell and Egeraat, 2001) but the focus has been on national rather than on regional clusters of competitive performance. Jackson and Murphy (2002: 38) note that "the cluster concept's applicability to tourism destinations would appear to be particularly germane", given that tourism involves the combination of complementary services. Therefore, the potential for policy applications remains constrained by the absence of any understanding of clustering in the context of cultural tourism. This lacuna in the literature provides a rationale for this study.

As regards the broader tourism field, Porter (1990) used the California wine cluster and Las Vegas gambling cluster as examples in his treatise. There is a small, but growing literature in tourism which addresses the implications of clusters for enhancing tourism growth. The predominant focus has been on wine clusters (Hall 2005; Getz and Brown, 2006) but scholars have explored micro-clusters based around antiques (Michael, 2007); healthy lifestyle tourism (Novelli, Schmitz and Spencer, 2006); culture (Brown and Geddes, 2007); music (Gibson, 2002; Gibson and Connell, 2003); sun-and-surf tourism (Lafferty and van Vossen, 2005); ski tourism (Nordin, 2003) and book tourism (Seaton, 1999). In an interesting study of Bryon Bay, Australia, Gibson (2002) found that a local university played a central role in music tourism by providing specialised programs, training and infrastructure (i.e., recording facilities and performance venues). In another study on cultural tourism in Cape Breton, the author concluded that the 'inherently local' attributes of physical beauty,

friendly people, vibrant culture, helped establish the destination as a tourism cluster (Brown and Geddes, 2007).

Table 1 outlines the key characteristics of clusters which are further explored in the data findings section. This research is guided by the study of Jackson and Murphy (2002) which analysed tourism destinations in Australia within the framework of Porter's cluster model.

INSERT TABLE 1 HERE

Research objectives, methods and cluster identification

The purpose of this paper is to explore the factors that lead to successful clustering in regional parts of Ireland and to assess the impacts that arise from co-location of complementary firms or actors.

The main research method was the exploratory case study analysis that attempts to determine the existence and impact of clustering on cultural tourism development. A total of 40 semi-structured, in-depth interviews were conducted with policy makers and practitioners. Since cultural tourism is multifaceted, festivals and interpretative centres were included in the sample (see Table 3). The aim was to engage with local voices as well as the representatives of the main agencies active in tourism and the arts. The interviews were usually conducted face-to-face, although in a few cases, upon request, the interview was conducted over the telephone. Given the local nature of the activity, a tape recorder was not used as it was felt that respondents might feel uncomfortable with a tape recorder or reluctant to commit their words to tape. Participant observation was also undertaken over the 5 month research period (May and September 2007). This generated field notes containing the author's personal experience of festivals, events and interpretative centres. A review of policy documents, newspaper articles, websites and promotional literature was also undertaken.

Researchers grappling with the cluster concept are invariably faced with inadequate data and information - usually provided in the form of standard industry classifications - and must interpret it, or reorganise it, in order to identify a cluster

(Porter, 1990). A decision was taken to focus on two case study regions: peninsular Kerry and County Clare. Based on preliminary research and interviews with experts, these areas seemed to have a distinctive cultural tourism environment with the potential to influence competitive performance.

Profile of Clusters

South Kerry is a prime tourist destination and visitors are attracted by the combination of natural beauty and cultural heritage (ranging from country houses, castles, towers, crosses, monastic remains and museums). Dingle town is reputed to be a haven of traditional music and 'trad sessions' in public houses are an important source of night-time entertainment. A regional airport (Kerry International Airport) has facilitated growth in tourism. The area has a history of in-migration and many well known visual artists, writers and film-makers live in the area and they evoke the tranquillity and beauty of the area in their work.

The cluster in County Clare is more narrowly focused on the traditional arts, notably, Irish music, song, dance and story-telling. The tourism authority has consistently deployed music to attract backpackers, domestic travellers and international tourists. The region's natural attractions include the Burren (a Special Area of Conservation) and the Cliffs of Moher, an iconic attraction which attracts about a million visitors each year. Table 2 profiles the characteristics of the clusters.

INSERT TABLE 2 HERE

Research Findings

Attract needed services and infrastructure to a region

In both South Kerry and Clare, government funding of interpretative centres has increased the scope of heritage resources in these areas. An audit of the tourism resource in provided in Table 2.

Generate demand for firms with similar and related capabilities

Related firms include coach tourism, transport, accommodation, local foods, indigenous arts and crafts, web-site designers, publicans and tour operators, who are independent of the subsidized arts sector, yet part of the local cultural tourism economy. The responsiveness of local industry to tourist demand can be shown in the atempts made to package music into for-profit workshops, hosting of traditional music nights in the local pub, and provision of all-inclusive, cultural holidays that attract long-distance visitors.

Require both cooperation and competition

Cluster participants may compete with other members in their field or support other cluster members by sharing resources.

The tourism destinations studied show signs of informal cooperation, such business referrals, to formal cooperation such as alliances and regional branding initiatives. There are examples of alliances where complementary products are joined together. For instance, the existence of a golf course in a small village had consequential benefits for an Art Gallery. An enterprising B&B owner marketed their accommodation service with a visit to the nearby World Heritage Site. An agri-tourism venture worked with another to develop a one-day sight-seeing tour.

Tourism operators in small villages are competing against externally-owned, large hotels and coach tour operators, and they are looking for ways to capture greater tourist revenue. The *Kerry GeoPark brand* was driven out of economic necessity and the belief that the arts, heritage and culture have the potential to attract the independent traveller, increase bed-nights, extend visitor length of stay and counteract leakage. Cooperation has led to significant outputs, such as a website, a promotional DVD, provision of training to enhance management capabilities. Local cafés, restaurants and accommodation providers are encouraged to sell locally grown foodstuffs. The rural B&B owners now have a viable hill-walking and cultural tourism package to offer visitors.

Arts-tourism cooperation was evident in the form of an *Open Arts Trail* which was designed to give the visitor a chance to meet the artist who creates and sells the product. Other examples of cooperation are the establishment of a C*ooperative Art*

Gallery (the artist essentially cuts out the middle-man), production of local *Arts and Crafts Guides* for the tourist market, the establishment of a Conference and *Forum for the Traditional Arts* in county Clare. In this cluster, the local tourist office was also used as a festival office, so shared infrastructure was a benefit in this cluster. Festival organisers had a relationship with local tourist offices is terms of presenting leaflets and advising officials of what was happening over the course of the festival.

Underpinned by networks and based on social values that foster trust, reciprocity and sustained collaboration

There were several examples of networking activity which were outlined in the previous section. This activity resulted in joint marketing, knowledge transfer, training and regional branding. Different ideologies were evident amongst stakeholders which has the potential to undermine trust. Attitudes towards arts-tourism networks were generally positive, but some respondents had concerns about the repositioning of traditional music as a tourist spectacle. One respondent remarked that traditional music sessions have an informal and spontaneous nature which could be eroded by tourism and she doubted whether musicians would capture a share of tourism expenditure. Traditional music is not defined in terms of 'professional' or 'amateur' and most musicians are either unable, or do not seek, to make a living out of music. Another example of conflicting ideology comes from the heritage sector. The Office of Public Works (OPW) that oversees heritage sites does not have a marketing remit: its mission is to conserve and preserve and its agenda is largely separate from tourism.

Community culture with supportive public policies, at national and local level

Festivals are endemic in the clusters. They typify many festivals around Ireland: they celebrate local traditions, are community-driven and stimulate the local economy. The people who organise the events are doing so in an unpaid capacity and are juggling full-time jobs, yet, leadership stability is evident (the same people run these festivals year after year). With funding from the local County Council, seminars on event management have been organised at a local level.

The Local County Council and the Arts, Heritage and Tourism officers act as conduits for information. Attempts are being made to gather specialised information at a local level, i.e., a database of musicians in County Clare, a Visitor Satisfaction Survey; dissemination of information on preservation issues surrounding local heritage sites. Local festival and events guide are designed to build awareness of musical activity and meet the needs of short stay tourists who would otherwise have to depend on word-of-mouth information. According to the Regional Development Manager, the ultimate aim is "to make Clare the leading County for quality, all year-round cultural events and festivals".

The cluster in Kerry, like most Irish-speaking areas, has a tradition of working closely with the development body, Udaras na Gaeltachta[1]. Údarás na Gaeltachta (2005) includes all facets of cultural tourism in its strategic plan, such as language-based enterprise, hill-walking, archaeology courses, painting, making pottery, playing an instrument, learning about literary traditions and traditional life on the Islands (Udaras na Gaeltachta, 2005). A new branding strategy and website 'GaelSaoire' (Holidays in the Gaeltacht) was developed in the mid 1990s. According to the regional manager, their approach to cultural tourism is to develop: "…the marketing, the softer aspects, the capacity-building or training or destination profiling." The regional manager sees opportunities to market the uniqueness of the area; to package festivals, bring different service providers together and sell the "totality of the holiday experience".

Institutional involvement, organisations providing training, education, information, research and technical support

Cultural associations play an important role in keeping traditions alive and setting standards. These include *Comhaltas Ceolteori na hEireann*[1] who provides music training to young children and adults. Furthermore, their international branch network is used to market traditional festivals. Other associations include *the World Music*

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[1] This state organisation promotes the socio-economic development of the Islands and Irish-speaking areas in Ireland and it provides 'hard' support in the form of grant-aid and equity but also 'soft' supports, such as marketing, training and brand-building, in order to develop the tourism economy.

Centre, University of Limerick, which is source of guest speakers and performers for local festivals. *Diseart,* is an educational institute in Dingle, and together with its Director, it plays a central role in cultural tourism by hosting arts festivals, providing advice to local writers and poets and infrastructure for local exhibitions and festivals. *AOIFE* (Association of Irish festivals and Events) was established to promote best practice and the sharing of experience amongst a growing network of festival organisers. A local training facility, an *Adult Education Centre,* developed Summer Leisure courses aimed at the tourist market. This project was shaped and orchestrated by the manager. The establishment of a new school, *Oidhreach an Chláir* (Clare College for Traditional Studies, www.oac.ie) is another example of dynamism in the sector. It emerged out of the success of a traditional music festival, the Willie Clancy Summer School, in Clare. Rural development bodies, whose ethos is one of help and support for people living in remote, disadvantaged and peripheral regions, play a role in the cluster. For example the *South Kerry Development Partnership* (SKDP), supports start-ups and work opportunities that are art-related.

Entrepreneurship and innovation

Some pioneering cultural tourism initiatives were made by individuals. Private sector projects include *Cill Rialaig* - the rescue and redevelopment of a pre-famine village as a retreat for artists and there are plans to develop a related World Museum of Contemporary Art. Another ambitious initiative came from the small village of Sneem where local economic necessity has led to the creation of the *GeoPark* brand. The local community were concerned about leakage and that the gains from tourism were flowing outwards. European GeoPark status is being sought. However, gaining the support of the community, the development of business skills and competence are ongoing priorities. World Heritage Site Status is being sought for the *Blasket Islands*.

Cultural vibrancy is shown by the emergence of new festivals, with some being held in the shoulder period of the season in order to improve the seasonality of tourism within the area. Innovation takes on many different forms in the context of cultural tourism – births of new festivals or events, new artistic partnerships and the fusion of different musical traditions. The festival organisers sought to draw on, and showcase, local cultural and heritage resources in its festival program. For example, a replica famine ship was used to launch one Arts festival. Festival organizers included hill-

walking in their arts program. Festivals drew on local talent - local poets, writers, craftspeople, musicians - as well as international talent.

Discussion

The cultural tourism cluster consists of a rather confused and eclectic range of organisations, people and activities. It is a temporal cluster, since it is more visible and more active in summer, the peak tourist season; it is a small, local, community-driven cluster but one that has links to global musical networks. Key features of this study's cluster are: government involvement, sophisticated demand and entrepreneurship, with regional branding being a key outcome (see Figure 1).

Figure 2 identifies the key elements of Porter (1998) diamond model and adapts the model to reflect the cultural tourism clustering process.

INSERT FIGURE 1 and FIGURE 2 HERE

This study lends support to Porter's (1998) thesis that sophisticated, local demand is a key feature of clusters. In the context of this study, traditional music shapes tourist demand. Anchor events succeed in drawing both a sophisticated, as well as a less sophisticated market, to the region: the dedicated musicians and casual visitors who are not in a position to judge quality. The sophisticated nature of demand is important because it helps shape the image of the destination and spawn demand for cultural tourism – illustrated in the organised pub sessions, fee paying concerts and packaged tours. The state has supported the development of the cluster by its focus on image-building and in anchoring this vision in practical networking events and provision of arts and heritage infrastructure. The importance of festivals in drawing tourists is well known in the literature (Quinn, 2006; Gibson and Connell, 2003).

Clusters are underpinned by strong social relationships, networks and a sense of common purpose (Porter, 1998). According to Porter (1998: 225), networks are the "social glue that binds clusters together, contributing to the value creation process". The work of Putnam (1994) on social capital is highly relevant given that festival organizers play a role in strengthening social networks and rejuvenating rural communities. The literature suggests that different ideologies can undermine trust in

networks. Artists are hesitant about entering the marketplace and concerned that they may lose control over the quality of their work. Their mission is not explicitly commercial and tensions stem from the artists' creative principles (Brokensha and Gulderg, 1992). Another useful viewpoint is provided by Baerenholdt and Haldrup (2006) who emphasize the mobile, global, dispersed nature of networks that underpin cultural tourism. Scholars emphasise the complex nature of interactions and connections in some clusters which can be simultaneously close to home and extending around the world, thus producing local 'buzz' and tapping into global pipelines (Bathelt, Malmberg and Maskell, 2002). The importance of local and non-local contacts certainly seems clear from the data collected in this study. Drawing on local musicians helps festival organisers retain support, but they also tap into non-local networks for a pool of talent.

The literature on clusters shows that one of characteristics of a cluster is the existence of related and supported industries, a 'pooled market' of specialized workers, local suppliers and service providers (Birkinshaw, 2000). The study supports this to a certain extent: the music tourism cluster in Clare led to some demand for specialised inputs such as musical instruments, specialist retailing and recording. However, Ireland's weakness in the downstream stages of the music industry's value chain, i.e., publishing, printing, marketing and distribution, has been noted (Music Board of Ireland, 2002). Therefore the impact of music on the Irish economy is not as significant as it could be in terms of turnover, employment and exports.

The concept of 'diagonal clustering' (Michael, 2003; 2007) refers to the co-location of complementary producers (accommodation, activities, transport, etc) which adds value to the tourism experience. There is some evidence that local conditions, local infrastructure and resources support entrepreneurial activity. Festival organisers draw on local history, myths and legends in their festival programming. Local tour operators are attempting to capitalize on the musical/cultural resources in the area. However, the ad-hoc and informal nature of traditional music activity does limit the development of a structured, holiday packages aimed at overseas visitors. In the music field, the emphasis is on the development of social and musical networks as opposed to the creation of business opportunities.

Porter provides a compelling case in defence of rivalry and minimal, direct state involvement in business. Yet, one can argue that cultural tourism is a special case since it is a state-dependent, diverse and highly fragmented sector. For instance, heritage sites are often dependent on public subsidy (Cooke, 2006). The history of Irish tourism shows heavy reliance on EU funds (Hurley et al., 1994). Business researchers are devoting more attention to different forms of clusters (Markusen, 1996). Markusen's (1996) concept of the 'state-anchored district' based on a hub-and-spoke design is interesting. The cluster profiled here is not driven primarily by the state; rather it looks something like the triple helix model, based on University-Industry-Government relationships (Etzkowitz and Leydesdorff, 2000).

Cultural tourism development: lessons to be learned

Policy makers and communities need to be aware of the limits to clustering and the barriers faced by cluster participants. This study suggests that arts and craftspeople are willing to engage with tourism, but musicians seem to have some difficulties with music-tourism packaging and organisers of music festivals do not always see themselves as being part of the tourism industry. While music stimulates growth in tourist demand, and as a corollary, gives rise to new business opportunities, the informal, ad-hoc nature of traditional music and tensions that exist between cultural and commercial perspectives may serve to limit local development.

Many lessons can be learned from this cluster study. The entrepreneurial nature of the community, combined with a close working relationship with local government, is what makes clustering initiatives work. An important characteristic for cluster development is shared vision, shared understanding of what cultural tourism is and how it can contribute to the local economy. The role of the policy maker in cluster-based economic development is to provide leadership, enhance linkages and relax any impediments or constraints to enterprise development. This study was useful in diagnosing strengths and weaknesses and indicated where improvements may be made. The cultural sector is highly fragmented; tourism policy, heritage policy and arts policy have largely separate agendas and priorities, so it is a difficult sector to manage and coordinate. One recommendation is the appointment of tourism cluster

officer, the preparation of cluster strategic plans and cluster funding projects. A cluster approach represents a shift away from funding an individual firm to a cluster - a group of festivals and service providers.

Another lesson for policy makers is that appropriate data needs to be gathered. The benefits of cultural tourism are often covert and intangible, such as quality of the visitor's experience. This study found that quantitative data was limited or unavailable at local level. Without data, it is impossible to measure the benefits of cultural tourism and easy to overstate or understate its economic benefits. There is a need to track attendance figures at local level: visitor expenditure during festivals, accommodation occupancy rates, employment concentration in cultural sectors, wage rates, in-migration, new business formation, new festivals and so forth. Such data provides a stronger case for support of the arts, culture and tourism.

Conclusion

It is part of conventional wisdom that the arts and tourism are linked and enjoy a mutually beneficial relationship (Hughes, 2002). This paper has revealed that Porter's (1990; 1998) cluster concept is a relevant paradigm though which to study cultural tourism. Rural and regional parts of Ireland have a distinct musical and cultural identity that has have helped foster cultural tourism. The clusters enjoy advantages which include sophisticated local demand; growth in arts infrastructure; presence of networks; emergence of related and supporting firms; strong community culture; institutional involvement and private sector leadership. There seems to be little doubt that cultural tourism gives rise to social and business opportunities in small communities.

Acknowledgements

Table 1: Characteristics of Clusters

Clusters
Attract needed services and infrastructure to a region
Generate demand for firms with similar and related capabilities
Require both cooperation and competition
Underpinned by networks and based on social values that foster trust, encourage reciprocity and sustained collaboration
Community culture with supportive public policies, at national and local level
Institutional involvement, associations and organisations providing training, education, information, research and technical support
Private sector leadership and innovation

Source: Rosenfeld (2004), Jackson and Murphy (2002).

Table 2: Characteristics of Clusters

Clusters	Cultural Tourism Cluster: Kerry	Music Tourism Cluster: Clare
Attract needed services and infrastructure to a region	Investment in Arts centres and Art galleries. State-owned heritage sites. Blasket Island Interpretative Centre	5 music schools and 7 multi-purpose, performing arts venues. State-owned heritage sites. Burren Interpretative Centre
Underpinned by networks; based on social values that foster trust, encourage reciprocity and sustained collaboration	Artists and craftspeople came together to develop 'Iveragh Arts', a guide to local arts and crafts in the peninsula. A cooperative Art Gallery was developed by artists Open Art Trail.	Cruinniú, a traditional arts conference first run in 2006. A series of free weekly concerts in Ennis. 'Trad for Teens' night in An Glor. Clare Traditional Arts Forum - set up in 2006. Workshops organised for Festival and Event organisers under an EU (Cantata) tourism development project
Generate demand for firms with similar and related capabilities	Ferry operators, publicans, B&Bs benefit from the World Heritage Site designation. Complementary firms to tourism include a local film producer, book publisher, arts and crafts and speciality food producers. Packaged tours have emerged (Gaeilge Beo: Irish Cultural Activity Holidays; Hidden Ireland Tours; Sciuird Archaeological Tours; Dingle Music School; Celtic Nature)	Complementary firms include a specialist recording studio (Malbay Studios), specialist retailing (Ward's Craft & Music Shop, Miltown Malbay. Custy's Traditional Music Shop, Ennis). Packaged tours have emerged (Irish Cycling Safaris combines cycling and traditional music; Authentic Ireland promotes cultural holidays)
Require both cooperation and competition	Regional branding – Kerry GeoPark	Regional Branding - Clare as an 'Area of Excellence' for music.
Community culture with supportive public policies, at national and local level	Development Cooperatives 20 community-run festivals in the South Kerry area, passionate organizers, stable leadership.	30 community-run festivals in the county as a whole; passionate organizers, stable leadership
Institutional involvement, organisations providing training, education, information, research and technical support	An Díseart, Dingle (Institute of Education and Celtic Culture). Coláisite Íde Boarding school. Tech Amergin, Waterville (Vocational/Adult Education Centre) Comhaltas Ceoltóirí Éireann Tourism offices. Cork-Kerry Tourism (Regional Tourism Authority). South Kerry Development Partnership (SKDP).	Shannon Development. Comhaltas Ceoltóirí Éireann Tourism offices Oidhreacht an Chlair a community group that runs specialized courses in cultural studies in Milltown Malbay. World Music Centre, University of Limerick.
Private Sector Leadership & Innovation	New festivals. Regional branding initiative, Kerry Geopark	New festivals and Summer schools

Table 3: List of Organisations

Table 3: Organisations	
Organisation	**Position**
Department of Sports, Tourism and the Arts	Minister for Sports, Tourism and the Arts (Former)
Fáilte Ireland	Festivals and Events Officer
Fáilte Ireland	Product Management Officer
Arts Consultancy	Consultant and advisor to Fáilte Ireland
Fáilte Ireland	Manager, Education Policy
Fáilte Ireland	Manager, Fellowship Scheme
Kerry County Council	Arts Officer
Kerry County Council	Heritage Officer
An Diseart	Administrator
Gaelige Beo	Founder
Millstreet World Bodhran Championships	Chief Executive and Financial Controller
Cahirciveen Celtic Music Festival	Committee (5).
Feile na Greine	Manager
Feile na Bealtaine	Assistant Director (Marketing)
Kerry Geo Park	Director
Skellig Experience	Manager
An Ionad, Blasket Island Centre	Manager
Gleninchaquin Park	Founder
Puck Fair	PR spokesperson.
Sculpture in Stone and Wood	Artist
Textiles Art Studio	Craftsperson/founder
Cill Rialaig Artists' Retreat	Founder
Siopa Cill Rialaig	Manager
South Kerry Development Partnership	Manager
Residency at Cill Rialaig	Visual Artists (2)
Údarás na Gaeltachta	Traditional Arts Officer for Munster
Údarás na Gaeltachta	Regional Manager - South
Willie Clancy Summer School	Founder/Director
Údarás na Gaeltachta	Corporate Planning
Glór	General Manager
Clare County Council	County Arts Officer.
Clare County Council	Shannon Area Regional Arts Co-ordinator (Traditional Arts Specialist).
Shannon Development	Development Manager
Shannon Development	Clare Tourism Officer
Arts Council	Traditional Arts Specialist

Figure 1: State-dependent cultural tourism cluster

Government: direction and provision of infrastructure and funds.

Regional branding

Sophisticated local demand: generating opportunity for the tourism industry

Entrepreneurs and community leaders: deployment of local cultural resources; underpinned by strong community culture and institutional involvement.
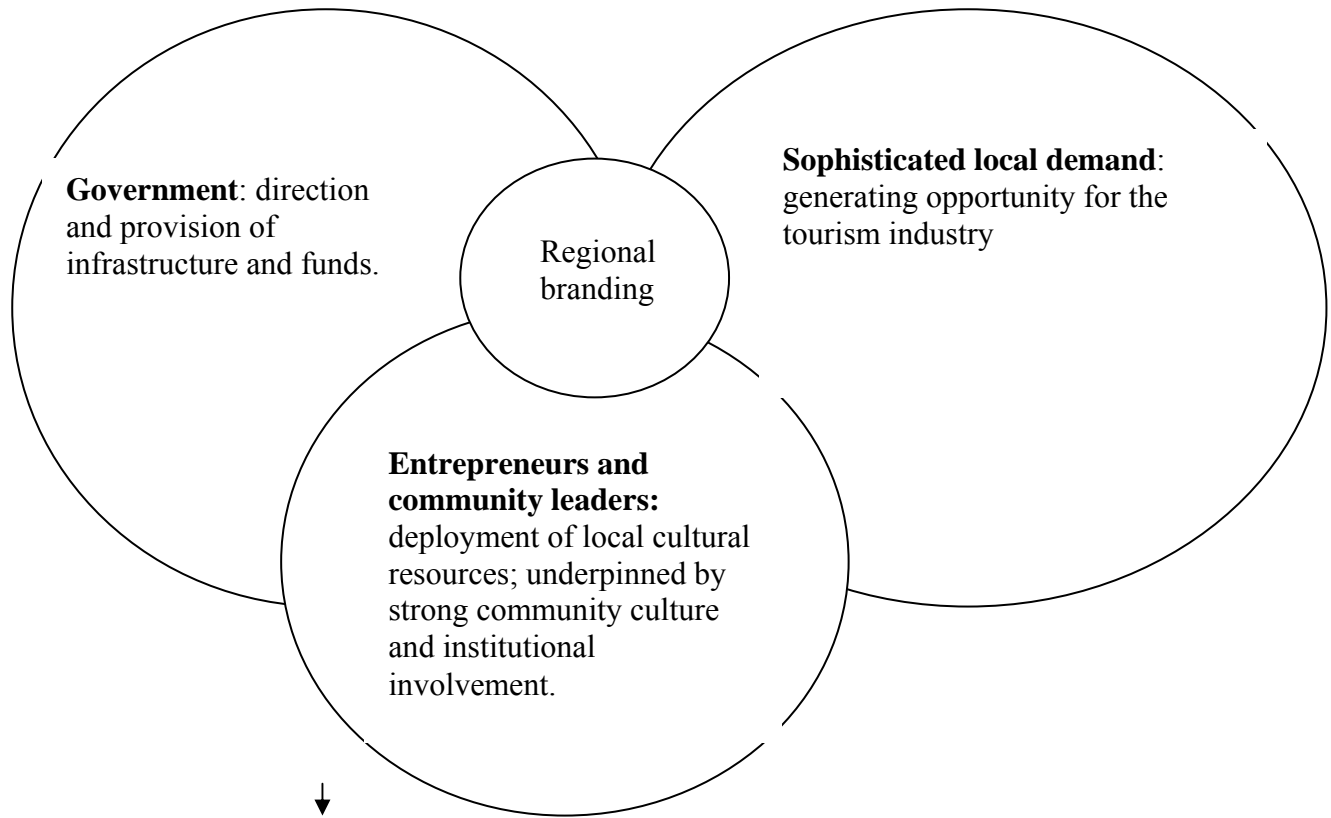
Figure 2: Cultural tourism cluster formation: influential factors

FIRM STRATEGY, STRUCTURE AND RIVALRY (shared vision, egalitarian structure, cooperation and competition)

Local and International Networks

DEMAND

Festival organisers, residents, musicians, tutors, artists, repeat audience, visitors

Outcomes
Cultural vibrancy, innovation and musical hybrids, increase in standards of practise, local economic development, value added to visitor experience, branding.

FACTOR CONDITIONS
Landscape, heritage sites.

CHANCE
Birthplace of musician/artist

RELATED & SUPPORTING FIRMS
Proactive, reactive or absent
Arts & Culture Infrastructure
Transport Infrastructure
Accommodation providers
Tour packages
Music recording & retailing

GOVERNMENT
Responsive or unresponsive
Awareness and use of branding
Grant aid and budget for arts
Gathering of data on arts
Promotion of event management skills
Heritage, cultural and grant-aid policy

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[1] Comhaltas Ceoltóirí Éireann, founded in 1951, established numerous branches for music education in Ireland. As a result expert tuition in dance and music was available to all. It is also known for hosting the feis cheoil, or music festival, which includes performances, music and dance competitions. The Fleadh Cheoil na hÉireann (the All Ireland Fleadh) is the culmination of several country and regional fleadhs. (Fleming, 2004).