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Collaboration in marketing regional tourism destinations: Constructing a business cluster formation framework through participatory action research

Rachel Perkins *, Catheryn Khoo-Lattimore, Charles Arcodia

Department of Tourism, Sport and Hotel Management, Griffith University, Brisbane, Australia

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ABSTRACT

Current research advocates for the effectiveness of tourism business clusters in promoting collaboration between stakeholders and successfully marketing destinations. However, there is a lack of insight on how a cluster is actually formed in order to reap such benefits, if a cluster does not already pre-exist within a region. Importantly, there is no research framework to explain the steps involved in forming a tourism business cluster in these areas. This inhibits regions that don't have an operational cluster in gaining the benefits of this form of collaboration. The purpose of this paper is to demonstrate how tourism businesses progress through the phases of cluster formation, enabling them to contribute to destination branding for their region. This paper presents the phases and their inherent steps to forming a tourism business cluster resulting from a Participatory Action Research (PAR) study where stakeholders formed a tourism business cluster in a regional destination in Queensland, Australia. The study involved participants from local tourism businesses, the local council, the local tourism organisation, regional tourism organisation, and state tourism organisation. Findings reveal three distinct phases to cluster formation, with each phase encompassing multiple steps. The newly formed cluster enabled participants to contribute to their region's destination brand through the creation of an event for their region. This study contributes important insights to the bodies of literature on collaboration and business clustering, as well as managerial implications for enhancing collaboration structures in a region.

1. Introduction

Collaboration has received praise in the literature for the benefits it offers businesses and of the many types of collaboration, the success of tourism business clusters has been widely noted (Caple, 2011; Gardiner & Scott, 2014; Hopeniene & Rutelione, 2016; Lade, 2010). Business clusters are unique to other types of collaboration, as they enable both cooperation and competition (Grangsjo, 2003; Rosenfeld, 1997), encouraging stakeholders to embrace competition for future success, while allowing the cluster to achieve economies of scale by pooling efforts and resources (Palmer & Bejou, 1995). Business clustering can also assist with raising awareness about the tourism destination and enhance destination marketing efforts by combining knowledge and resources (Hall, 2005; Randall & Mitchell, 2008; Taylor & Miller, 2010). Furthermore, clusters have shown to increase a regions success in terms of tourism expenditure and overnight tourist visitation, in comparison to regions who had not fully adopted clustering (Lade, 2010).

It is of utmost importance to note, however, that existant research has only investigated clusters that already exist within a region. Present literature does not explain *how* clustering can be formed in a region where this type of collaboration does not already pre-exist. In fact, Wolfe and Gertler (2004) refer to a striking lack of consensus over how clusters are formed and how they can be set in motion. Seventeen years later, the conceptual clarity of clusters is not improved and there is still a lack of literature reporting on the formation of a cluster. If business clustering is so beneficial, how can it be that it is not yet understood how to create this type of collaboration?

In unpacking challenges that may inhibit cluster creation, literature suggests that stakeholder relationships from a collaborative viewpoint is complex, as stakeholder relationships involve multiple stakeholders with varying interests and goals (Savage et al., 2010). In fact, McComb, Boyd & Boluk (2017) questioned whether stakeholder collaboration should be pursued if there is uncertainty surrounding its implementation. The authors raised critical questions on whether stakeholder collaboration was as beneficial as the existing literature had reported. Indeed, research on collaboration between small tourism operators in Australia revealed small businesses were reporting more issues than benefits within their collaborative efforts (Perkins & Khoo-Lattimore,

* Corresponding author.
E-mail address: Rachel.perkins@griffithuni.edu.au (R. Perkins).

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2020). These issues included limited knowledge, unbalanced efforts between businesses, competition and differing opinions between businesses, a perceived lack of leadership from local governing bodies, an informal nature of the collaborative arrangements, and that involvement in collaboration was not structured, without any formalisation of their collaborative efforts.

Resolving collaboration challenges therefore begets an understanding of the factors inhibiting successful and effective collaboration in regional tourism destinations. Since stakeholders in previous studies referred to the informal nature of previous collaboration efforts (Perkins & Khoo-Lattimore, 2020), a business cluster could surely be used as a formalised collaboration model to address the challenges facing these businesses. Therefore, research into the process of business cluster formation is essential so that regions without pre-existing business clusters can apply these strategies and develop effective collaboration. As such, the aim of this study is to provide insights into how small tourism businesses in a regional destination without an operating business cluster can progress through the phases of forming a tourism business cluster, resulting in the research question; *How do small tourism businesses progress through cluster formation to contribute to destination branding?* Gaining this understanding would significantly develop the paucity of literature in this domain and contribute greatly to managerial know-how on cluster formation.

2. Conceptual background

2.1. Understanding destination branding and the challenges that regions face

Destination branding is considered an important tool for establishing destination differentiation, competitive advantage and effective positioning within the marketplace (Hosany, Ekinci, & Uysal, 2006; Kotler & Gertner, 2002). Destination brand and image are essential in motivating the tourist to visit the destination (Cai, 2002) and can be created by strengthening those associations that tourists deem important and valuable (Keller, 1993). But, literature suggests that the planning and implementation of marketing activities for a regional destination are somewhat multisectoral and incoherent (Wang, Hutchinson, Okumus, & Naipaul, 2013). Given that destinations are multidimensional, particularly in comparison to consumer goods, marketing them is more difficult than consumer goods and other types of services (Pike, 2005). When the scope of the destination is limited to regional locations, these dimensions become even more complex as regional destinations are largely comprised of small tourism businesses. These businesses face a unique set of challenges due to their size (Ateljevic, 2007; Page, Forer, & Lawton, 1999; Thomas, Shaw, & Page, 2011), and as such, face challenges in successfully contributing to their destination brand (Perkins & Khoo-Lattimore, 2020). Although there has been progression in understanding regional destination branding and its complexities, understanding of the guiding principles for regional destination branding is still fragmented, as a region's tourism product mix consists of multiple elements that are supplied by different small tourism providers within that region (Hall, 1999).

2.2. Collaboration for regional destination branding success

Collaboration can play a significant role in the development of a regional brand (Caple, 2011; Saxena, 2005), as it can promote forward-thinking discussion between stakeholders, encourage negotiation, establish mutually beneficial proposals for future tourism development, and help governmental bodies understand and take into account the aspirations of regional tourism destinations (de Araujo & Bramwell, 2002). Gray (1989) discussed features of collaboration, including autonomous stakeholders who were also co-dependent and constructively dealing with differences, and joint ownership of all decisions and collective responsibility for the future. Collaboration between stakeholders can facilitate wider support for the development of tourism in a region (McComb, Boyd, & Boluk, 2017), and understanding this collaboration can create opportunities to more effectively manage tourism within a destination (Todd, Leask, & Ensor, 2017). Within guiding principles established for the success of destination brands by Hankinson (2007), 'consistent communication across a wide range of stakeholders' and 'compatible partnerships with synergy' are mentioned as two key elements. This suggests the need for collaborative efforts from stakeholders for successful destination branding yet does not claim that collaboration is essential, but rather just an element of successful destination branding.

Where complementary products, activities, accommodation, transport and food (all examples of small tourism businesses) are co-existing within a region, there is opportunity for connections and interrelationships (Pavlovich, 2003). Cox and Wray (2011) also integrate elements of collaboration in their best practice marketing strategies for tourism businesses within regional destinations. They encourage cooperation with nearby regions, the pooling of resources, education for the local community, and integration with the regional tourism organisation in order to achieve successful regional destination branding, yet collaboration between tourism businesses within the region is not highlighted as a key factor. While collaboration is evidently an important factor for regional destination branding success, how exactly such collaboration is created has not yet been analysed within the literature.

2.3. Unpacking collaboration with business clustering

Business clusters are a form of collaboration commonly discussed in the literature. Business clustering is a strategy by which firms can collaborate to gain competitive advantage (Porter, 1990), which, in a tourism context, encourages businesses to sell the destination before selling their individual businesses (Gardiner & Scott, 2014). Tourism business clusters can create interdependence between stakeholders, fostering knowledge and skills transfer between them with the objective to raise the profile of their region (Caple, 2011). Clusters can be particularly useful for a tourism region to achieve competitive advantage as clusters can assist with raising awareness about the tourism destination (Hall, 2005), and they do this by enhancing destination marketing efforts by combining knowledge and resources of cluster members (Hall, 2005; Randall & Mitchell, 2008; Taylor & Miller, 2010). Porter (1998), defines a business cluster as a "geographic concentration of interconnected companies and institutions in a particular field" (p.78), and it is this definition that has been most frequently used within tourism literature for assessing business clusters. As business clusters foster a sense of togetherness within the community, a region can further develop its desirable characteristics to attract tourism (Taylor & Miller, 2010). Telfer (2000) reported that cluster members engaged in joint marketing, sharing of customers and research, and Jackson and Murphy (2006) explained that clusters encouraged differentiation and innovation rather than focusing on competition, as well as discouraging competitive behaviors like cost cutting. Evidently, research to date suggests that business clustering is a successful strategy for collaborative and destination branding success.

Business clusters can either be implemented top-down by regional authorities, or bottom-up by a group of firms (Fromhold-Eisebith & Eisebith, 2005). While it is commonly top-down official cluster policies that are strongly regarded, bottom-up initiatives that are directly governed by groups of businesses and do not require public support should also receive this regard (Fromhold-Eisebith & Eisebith, 2005). Fromhold-Eisebith and Eisebith (2005) explain that top-down clusters better address the material base of the economies of a cluster, can be more inclusive and expansive, and have wider regional impacts, but bottom-up clusters best support immaterial qualities of socially embedded interaction, they can create stronger motivation between cluster members, and "can induce faster outcomes in terms of functional, innovation-related collaboration affecting firm performance"

(Fromhold-Eisebith & Eisebith, 2005, p. 1265). As the interaction between stakeholders within the cluster is of importance to the present study, it is understandable that a bottom-up approach is the most suitable cluster formation style.

With all of this insightful research, however, there is still a major lack of information on how a cluster is formed. According to a recent literature review on tourism stakeholder collaboration (Perkins, Khoo-Lattimore, & Arcodia, 2020), there is a current lack of understanding on how a cluster is actually formed. Their paper states that "the tourism literature has not yet extended to broach any areas in which a business cluster does not already exist and therefore, does not provide knowledge on how a business cluster can be initiated, or provide details on the stages to cluster formation" (Perkins, Khoo-Lattimore & Arcodia, 2020, p.254). Literature to date has not specifically outlined how these clusters are set in motion, which contributes to what Wolfe and Gertler (2004) described as a "striking lack of consensus over how clusters are started" (p. 1073). Since 2004, this lack of conceptual clarity is not improved, emphasising the importance of the present study which seeks to resolve these uncertainties. In order to find a starting point, research by Hawkins and Calnan (2009) can be used, as they summarised their study with practical suggestions for future cluster development projects. While their research is 11 years old and their suggestions are not empirically tested, their research is suitable to guide the present study due to the practical nature of their suggestions, which have been summarised into Steps by the authors of this paper into Fig. 1 below.

Hawkins and Calnan's (2009) study also poses many questions to cluster formation. The authors provided the guidelines without empirically testing their effectiveness, and without providing necessary explanation of each step. The present study seeks to confirm or deny, and understand each step in cluster formation, to resolve this gap in understanding. The above guidelines form a basis for this study and will seek to respond to the proposed research question.

3. Methodology

This study used participatory action research (PAR) to address the research question. PAR has been defined as a "participatory, democratic process concerned with developing practical knowing in pursuit of worthwhile human purposes" (Reason & Bradbury, 2001, p. 1). PAR was selected for this study, as it seeks to develop practical knowledge into the formation of a tourism business cluster. PAR is useful when the purpose of the research is to gain a deep understanding of forms of collaboration (Capriello, 2012), which shows strong alignment to this study. Furthermore, PAR is useful in creating a collaborative climate by planning actions with local stakeholders (Capriello, 2012). This approach is useful for the present study, as it seeks to create a collaborative climate in the case study region. Further, planning actions with local stakeholders will be essential to progressing through cluster formation. It is expected that this focus on local stakeholders will also reveal insights into the stakeholder typologies that drive or hinder cluster formation. Since participatory research design offers an opportunity for stakeholders to be involved (Ho, Chia, Ng, & Ramachandran, 2017; Jaafar, Rasoolimanesh, & Ismail, 2017), such framework is highly suitable for this study, as it posits that stakeholders should be allowed to participate in the decision-making activities to solve tourism problems (Robson & Robson, 1996).

Within tourism, action research has been used in varied settings, including tourism planning and/or development (Grant, 2004; Jernsand, 2017; Papathanassis & Bundă, 2016; Schmitz & Lekane Tsobgou, 2016), stakeholder collaboration and/or networks (Capriello, 2012; Kelliher, Foley, & Frampton, 2009; Waayers, Lee, & Newsome, 2012) and has been explored in numerous contexts including small businesses (Anckar & Walden, 2001; Kelliher et al., 2009) and rural tourism (Capriello, 2012; Idziak, Majewski, & Zmyślony, 2015; Paul, Weinthal, Bellemare, & Jeuland, 2016; Salvatore, Chiodo, & Fantini, 2018; Schmitz & Lekane Tsobgou, 2016), proving PAR's applicability in tourism settings.

Within PAR, researchers work in partnership with communities to generate knowledge through systematic inquiry to solve the identified problem at hand (Chambers, 1994; MacDonald, 2012; Fals-Borda, 2001; Reason & Bradbury, 2001). Participants' opinions are shown without manipulation from the researcher, and participants are active in making decisions throughout the research process (MacDonald, 2012). Typically for PAR, data collection occurs via community meetings and/or events,

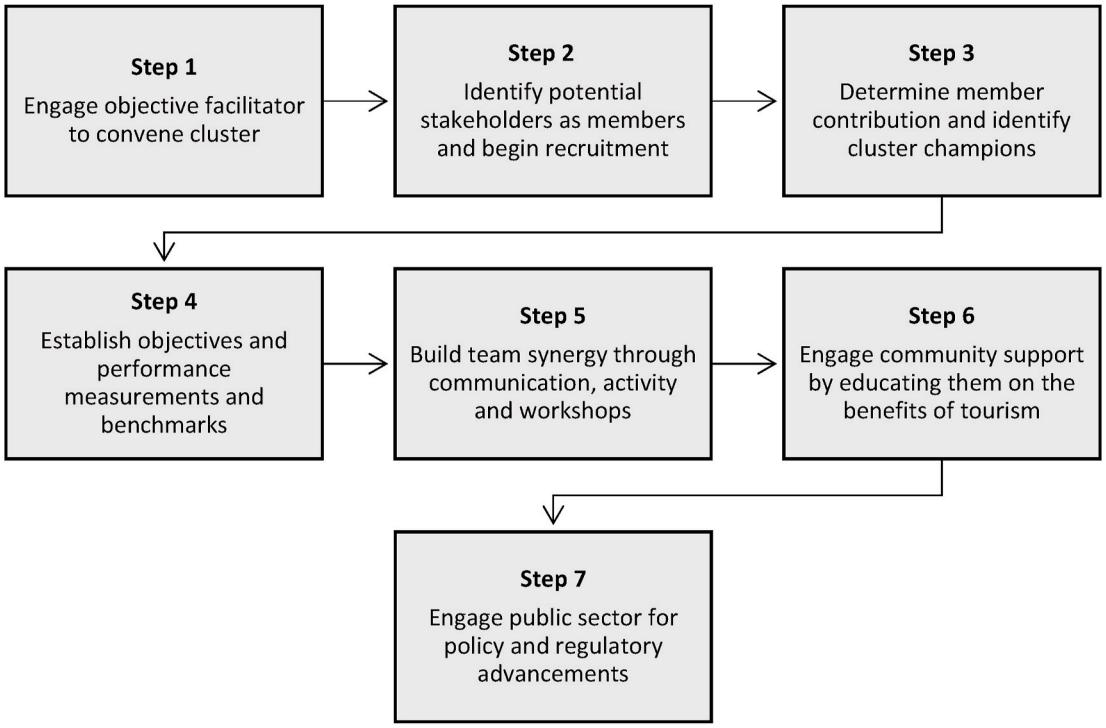

Fig. 1. Guidance for Tourism Cluster Development, informed by Hawkins and Calnan (2009).

both small and large, that serve to identify issues for that community of interest, analyse the information gathered at the event, and then use reflection to plan for the next stage of data collection (Selener, 1997). According to McTaggart (1997), one way to begin data collection using PAR is to collect initial data within the community of interest, analyse the results and then plan for changed actions (McTaggart, 1997). The results from each stage are reflected upon before acting on the proposed following stage. Given that PAR is an evolving, cyclic process, it is important to evaluate throughout every step of the data collection process before moving on. As such, it is appropriate that the data collection method allows for flexibility. Fig. 2 below is the methodological framework that has been created by the authors to guide the present study, which has been conceptualized to align with the research question and the theoretical framework for cluster development.

3.1. Defining the target community

In all PAR studies, it is essential to define the target community (Penrod, Leob, Ladonne & Martin, 2016), specifically because the planning cycle involves assessing the target community and working with it to create strategies to move forward (MacDonald, 2012). In this research, the target community were the stakeholders involved in business cluster formation. There was an array of stakeholders involved in this study totaling 19 participants; 1 café/attraction, 2 attraction providers, 1 winery owner, 7 accommodation providers, 5 representatives from the local council, 1 representative from the local tourism organisation, 1 representative from regional tourism organisation, and 1 representative from state tourism organisation. These are further described in a Respondent Profile in the findings below in Section 4.0. (Table 2).

The Granite Belt Region in South-East Queensland is the case study and target community of this study. Previous research had revealed that this region was facing many challenges to collaboration (Perkins & Khoo-Lattimore, 2020). As such, this research posits that this region would benefit from forming a tourism business cluster, with the PAR approach offering opportunities to foster the creation of a collaborative climate among stakeholders (Capriello, 2012). This region was also selected because the primary researcher is familiar with it, having developed a broad network of stakeholders within the region, and subsequently, trust between the researcher and participants.

This is important because developing a collaborative network between researchers and participants is Cardinal Principle 1 of PAR methodological strategies (Penrod, Loeb, Ladonne, & Martin, 2016 and trust leads to a sense of co-ownership over the project, which is Cardinal Principle 2 (Penrod et al., 2016). This familiarity was also useful to recruit participants via familiar face to face contact, and snowball sampling. Lastly, the Granite Belt fits into the regional classification of a destination and comprises several small tourism businesses, which is central to the focus of this study.

3.2. Data collection

As depicted in Fig. 2 the appropriate way to begin data collection using PAR is to collect initial data with participants of interest, analyse the results and then plan for action (McTaggart, 1997). The results from this initial stage would be reflected upon, and then the researchers would act on the proposed next step (McTaggart, 1997). As a result, data collection occurred throughout many phases, over a period of months as the cluster was formed, and stakeholders continued to work together to plan an event for the region. Data collection included participant observation, formal meetings, informal discussions, 'catch-ups' with key stakeholders, telephone conversations, text messages, emails, membership of a Facebook Group, document share, and attendance at committee meetings (the primary researcher was a committee member on the 'Economic Development and Regional Promotion Advisory Committee' for the Southern Downs Regional Council). Handwritten notes were taken throughout to capture key discussion points and notable quotes (Beyea & Nicoll, 2000). The researcher also took notes about body language, group mood etc.- which cannot be captured on an audio recording (Krueger, 2000). Following any meeting, the researcher took video diaries immediately after in a 'debrief' type session, to discuss additional perspectives, observations, and thoughts 'after the fact' (Beyea & Nicoll, 2000). In some situations, like a phone call, it was not practical for the researchers to request to record the conversation, and in this instance, the researchers took detailed notes during those occasions and also followed them up with a voice memo or video recording recap. Many of the meetings shared common features of a focus group (lasting between 1 and 2 h and consisting of between 6 and 12 participants) (Onwuegbuzie, Dickinson, Leech, & Zoran, 2009), In keeping with the most rigorous analysis for a focus group, transcriptions were required for analysis, along with notes (Onwuegbuzie et al., 2009). All of this data was then transcribed (unless already in typed format). In total, the dataset consisted of 41 data files, totaling just under 99,762 words, plus 1477 pages of email communications plus 16 pages of PDF/PAGES documents (this type of document could not provide a word count). The data files are shown below in Table 1.

3.2.1. Trustworthiness in data collection

In the context in this study, consideration must be given to the trustworthiness of the data collection due to using various collection techniques. Data was collected via some formal methods (meetings, interviews) and some less formal methods (Facebook Group, texts,

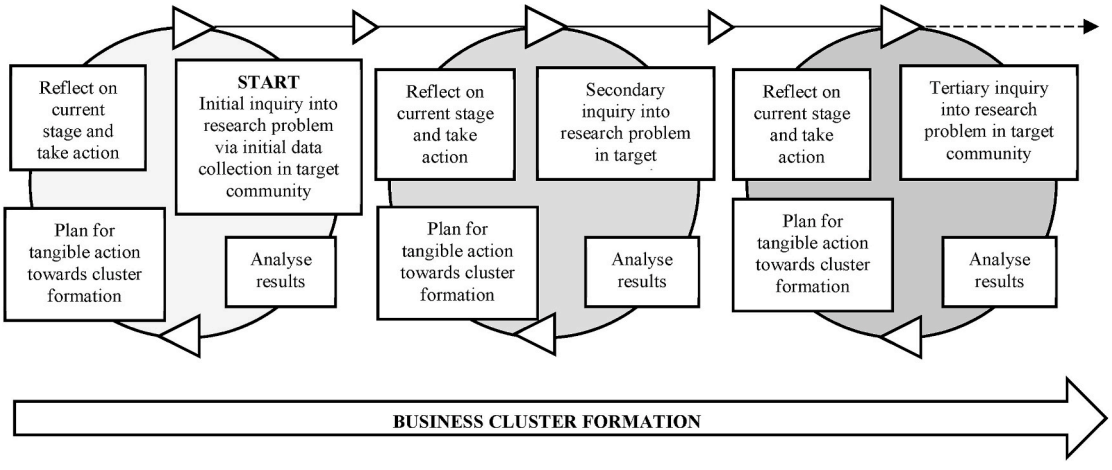

Fig. 2. Methodological framework: A systematic inquiry into business cluster formation.

Table 1
All data files analysed.

File #	Date	File Description *(All files transcribed)*	Word Count or Page Count
1	August 07, 2018	Notes from Meetings with Industry Leaders	1321 words
2	August 23, 2018	Project Outline sent to Industry Body	8 pages
3	August 27, 2018	Notes from Meeting with Participant	512 words
4	September 31, 2018	Notes from Meeting with Participant	1380 words
5	December 07, 2018	Voice Memo following Issues with Data Collection	1638 words
6	December 28, 2018	Voice Memo following Meeting with Participant	368 words
7	January 11, 2019	Voice Memo following Meeting with Industry Body	5044 words
8	March 20, 2019	Notes from Meetings with Cluster Members	798 words
9	March 23, 2019	Interview with Cluster Members	12,676 words
10	March 23, 2019	Interview with Cluster Members	13,811 words
11	March 23, 2019	Voice Memo following Interviews	1337 words
12	March 30, 2019	Interview with Cluster Members	6726 words
13	March 30, 2019	Voice Memo following Interview with Cluster Members	647 words
14	April 01, 2019	Research Collaboration Group Plan	1504 words
15	May 03, 2019	Event Brainstorming Output from Cluster Members	984 words
16	May 03, 2019	Event Brainstorming Output from Cluster Members	688 words
17	May 05, 2019	Event Brainstorming Output from Cluster Members	133 words
18	May 06, 2019	Event Brainstorming Output from Cluster Members	400 words
19	May 10, 2019	Event Brainstorming Output from Cluster Members	362 words
20	May 10, 2019	Mind Map & Target Markets Output from Cluster Members	357 words
21	May 10, 2019	Mind Map Output from Cluster Members	157 words
22	May 10, 2019	Target Markets Output from Cluster Members	272 words
23	May 10, 2019	Target Markets Output from Cluster Members	425 words
24	October 17, 2019	Mind Map Output from Cluster Members	85 words
25	October 17, 2019	Target Markets Output from Cluster Members	576 words
26	May 17, 2019	Target Markets Output from Cluster Member	280 words
27	July 12, 2019	Group Event Planning Shared Document	1906 words
28	July 15, 2019	Face to Face Focus Group	11,187 words
29	July 15, 2019	Voice Memo following Focus Group	2937 words
30	July 15, 2019	Interview with Cluster Members	14,310 words
31	July 15, 2019	Voice Memo from Interview with Cluster Members	519 words
32	July 28, 2019	Self-Complete Interview from Cluster Members	650 words
33	August 02, 2019	Self-Complete Interview from Cluster Members	634 words
34	August 13, 2019	Self-Complete Interview from Cluster Members	686 words
35	August 13, 2019	Self-Complete Interview from Cluster Members	660 words
36	September 17, 2019	Voice Memo following emails with Cluster Member	951 words
37	September 20, 2019	Events Proposal for Industry Body	7 pages
38	January 29, 2020	Notes from Face to Face Focus Group	1068 words
39	January 29, 2020	Face to Face Focus Group De-Brief Notes	2105 words
40	May 13, 2020	Zoom Focus Group	8084 words
41	May 15, 2020	Self-Complete Questions Cluster Members	396 words
42	May 15, 2020	Self-Complete Questions Cluster Members	704 words
43	May 18, 2020	Self-Complete Questions Cluster Members	378 words
44	May 21, 2020	Event Run Sheet (Webinar Event)	1 page
45	June 30, 2020	All Email Communications	1477 pages

Table 2
Respondent profile.

Participant No.	Business Type	Role in Business
1	Café/Attraction	Owner/Manager
2	Local Council (SDRC[a])	Representative
3	Local Council (SDRC)	Representative
4	Local Council (SDRC)	Representative
5	Local Council (SDRC)	Representative
6	Regional Tourism Organisation (SQCT[b])	CEO
7	State Tourism Organisation (TEQ[c])	Destination Director
8	Local Tourism Organisation	Representative
9 & 10	Accommodation	Owner/Manager
11 & 12	Accommodation	Owner/Manager
13 & 14	Attraction	Owner/Manager
15	Accommodation	Owner/Manager
16 & 17	Accommodation	Owner/Manager
18	Winery	Owner/Manager
19	Local Council (SDRC)	Representative

[a] SDRC: Southern Downs Regional Council.
[b] SQCT: Southern Queensland Country Tourism.
[c] Tourism Events Queensland.

phone calls), which added a complexity but also depth to the process. In order to ensure trustworthiness of the data and how it was collected, the researchers adhered to established and generally accepted guidelines for qualitative data collection such as focus groups (Beyea & Nicoll, 2000), and kept their personal interpretations of all data collected to their research notes and diaries. All data that was collected was transcribed verbatim where possible, removing bias from the researchers during data collection. For instances where a direct recording and transcription was not possible (a phone call, for example), the researchers aimed to keep as neutral as possible when writing research notes or a diary entry, while acknowledging that total non-bias is impossible to achieve with qualitative methods. In fact, the researchers recognise that personal bias, understanding, values and thoughts were inevitably represented within this project at times due to the primary researcher's connections to the region; and it is due to this that the researcher was able to gain a richness of data, as the researcher was welcomed warmly by participants, due to familiarity and personal history within the industry (Archer, 2007; Bourdieu, 2004; Ellis & Bochner, 2000).

In addition, as the study sought to confirm or deny Hawkins and Calnan (2009) research, care was taken by the researchers to not guide participant responses towards the research objective during interviews etc. While participants were informed of the research project and were offered complete transparency to see the research proposals, the common motive for participants to join the study was to work with other participants towards the group project, rather than analysing how the group was progressing. Participants expressed a desire to work towards a benefit for their community/region and this was their focus-the researchers were the only people involved in the study that were monitoring the progression of the group and how it moved through the different stages and steps of cluster formation.

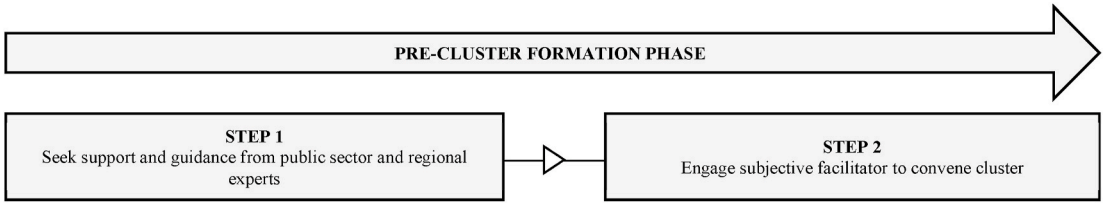

Fig. 3. Pre-cluster formation phase.

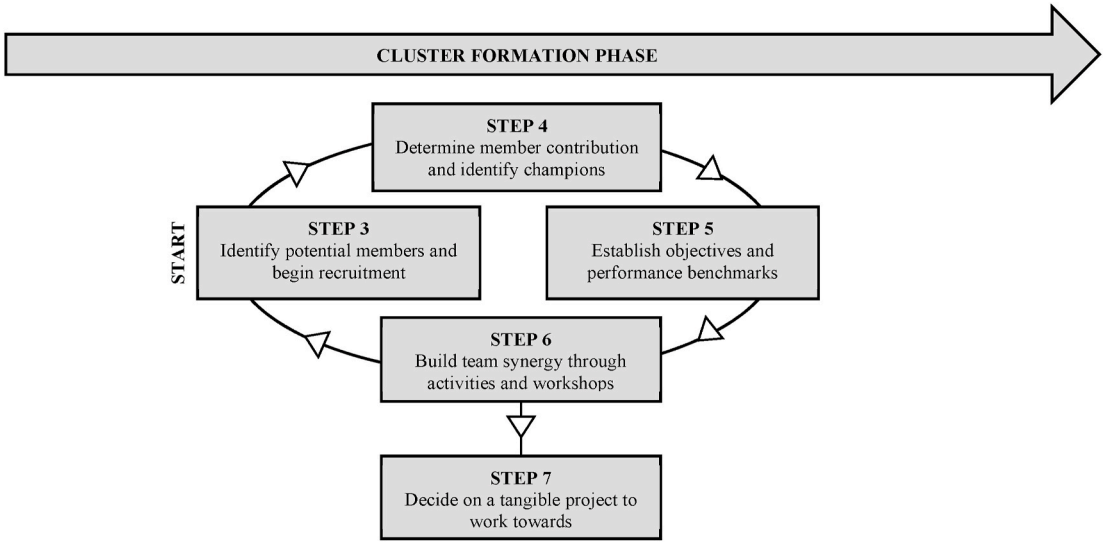

Fig. 4. Cluster formation stage.

3.3. Data analysis

The data analysis is outlined in the following stages. To begin, all audio files (interviews, focus groups, and voice memos) were transcribed with assistance from webpage 'Transcribe'. All other data was already in written format (emails, work activities, researcher diary, Facebook group comments), and did not require transcription. A Microsoft Excel spreadsheet was then created to conduct thematic analysis, where each data collection item was coded inductively to identify broad themes and patterns (Adler & Clark, 2014). The researchers summarised the data, coded it by identify idea groups, and generating key themes (Beyea and Nicoll, 2000). This categorisation of the data occurred by assigning observations into categories (Alder & Clark, 2011). The categories were derived from the reviewed literature. Guiding this coding process were Principals 1 & 2 of PAR, as well as concepts relating to business cluster, collaboration, and stakeholder typologies. This theoretical guiding of the data analysis offered a more holistic understanding of the research problem. The basis of the coding process was to identify the data that informed the business cluster formation stages that arose from the PAR process. PAR was used in the coding process because it offered guidance into the organisation of the data analysis phases. Since PAR is a cyclic process, each phase informed the next stage of data analysis (McTaggart, 1997). As a result, it was important that the data was kept in accordance to the phases by which it was collected. These phases were informed by business cluster and collaboration concepts within the literature (see Fig. 1 above) (Hawkins & Calnan, 2009; Perkins & Khoo-Lattimore, 2020). As such, the suggested guidelines to cluster formation were compared alongside the empirical data to either confirm, disprove, or expand upon original assumptions from the literature.

Finally, to offer additional rigor to the data analysis process, the data was then added and inductively coded in NVIVO. All material was gathered into theme 'nodes' and 'sub-nodes' and their relationships were analysed using queries, explore and compare diagrams, and mind and concept maps features in NVIVO. This was done to confirm the ideas uncovered during the initial thematic analysis in Microsoft Excel and uncover alternative patterns in the data, which resulted in a high consensus level.

4. Findings

The research question was to understand how small tourism businesses progress through cluster formation. The findings revealed that there are three distinct phases to cluster formation and each phase has steps within. The three phases are; the pre-cluster formation phase, the cluster formation phase, and the cluster progression phase, and there are 12 steps in total, divided into each of the phases.

The below respondent profile (Table 2) provides details of the participants in the order that each participant was engaged with. 11 of the participants were owners/managers of local businesses, and 8 participants were representatives for their organizations.

4.1. Pre-cluster formation phase

The most surprising finding from this study is the discovery of a pre-cluster formation phase, which involved Steps 1 and 2.

Step 1 is to seek support and guidance from public sector and regional experts. Participants suggested that initial selective membership would allow the cluster to grow whilst maintaining a positive perception in the region. This approach could eventually lead to open membership, which would then be in line with typical structure of a business cluster (Rosenfeld, 1997). This information helped guide how the cluster would be formed, and which stakeholders to seek and avoid during recruitment for cluster members. Their sentiments are below:

P1 (File #1): "There are some really strong figures … it needs to be selective."

P2 (File #1): "The group needs to be selective, otherwise you will just be putting out fires."

P6 (File #1): "Don't get too caught up in small-town politics … People will try to pull the project in a number of ways."

P7 (File #1): "Be very selective about who you let into the cluster."

This study revealed that step 2 was to 'Engage a subjective facilitator to the convene cluster' prior to the cluster formation Participants unanimously agreed that the cluster would more likely be successful if the primary researcher convened the cluster as a result of their familiarity with the region. It is important to note that the participants expressed the need for the facilitator to have developed trust, a sense of co-ownership, and a collaborative network from previous research and connections in the region.

P2 (File #3): "I think this is great … Let's arrange a meeting with [public sector representatives already familiar to researcher] to tell them about your idea … I want you to be on the committee again this year."

P6 (File #4): "You already have a great group of connections from your last study here to include [in the cluster] … make sure you ask me for help [with the cluster] when you need it."

The first two steps to pre-cluster formation are depicted in Fig. 3 below. Once the pre-cluster formation was completed, the cluster formation began. This phase is described in the following section.

4.2. Cluster formation phase

The cluster formation stage constitutes steps 3–7, and steps 3–6 occur in a cyclic process, meaning that the steps can, and sometimes will, repeat, as depicted in Fig. 4 below. While this phase can end at step 6, the framework also allows for repetition of the first four steps of cluster formation, depending on the goal of the members at the time. For example, if the goal of the cluster was to increase membership or to network with others, the first four steps could be repeated until this goal was satisfied. Because the goal of the cluster in this study was to create an event to help market the region, the members progressed to step 7. The stages are described in detail in the following paragraphs.

Step 3: 'Identify potential members and begin recruitment' was informed by participant feedback in Step 1. From the suggestions, three local businesses were recruited that constituted participants 9–14. These participants then recruited other businesses to join in a snowball sampling strategy, adding participants 15 to 18. During this recruitment, a strong theme surrounding the specific characteristics desirable of cluster members, as depicted by participants' comments below:

P9 (File #9): "We can't have people that are hung up on old issues or who have bad blood."

P10 (File #9): "You get a bit sick of the (drama), and you just want to move on with it. So, we need people that will be happy to just get on with it."

Step 4: The 'Determine member contribution and identify champions' step involved each member explaining their ability to contribute, and proposing cluster champions. It is important to note that while participants were prepared to suggest a cluster champion, they did not really see the value in it. This could have been due to the size of the group and the selectiveness of who was involved at this stage. However, champion identification is still included in the framework for transferability to other regions. While cluster champions were originally identified as participants 9 to 14, only participants 12 and 13 were identified as champions, due to other members dropping out; an issue addressed in the section on cluster challenges.

Step 5: 'Establish objectives and performance benchmarks' revealed that participants were seeking something 'positive' to bring to the community to raise the profile of the region, as depicted by the following comments:

P11 (File #11): "That's the main outcome, I think, for anyone to be – to keep the community alive and vibrant and to let people know that this is the place to come. It will promote our business, our region and keep our town going, particularly given that there's so much negative stuff happening at the moment."

P13 (File #12): "We really want this to be positive. We just want to come together and do something that is positive for the region."

All participants, except for 13 and 14, made positive remarks about joining together to host an event for the region. Participants 13 and 14 raised concerns that the region did not need another event. Given the dominance of participants wishing to host an event (12 out of 14 participants), a schedule was created in consultation with Participants 9 to 14, which informed Step 6 of cluster formation. It is important to acknowledge that only 6 participants were involved in the creation of the Schedule of Activities, because those participants were the cluster champions and felt they had enough experience to contribute to this schedule.

Step 6: 'Build team synergy through activity and workshops' saw the development of a schedule of activity and workshops (see Table 3, below). The 'free session' may not be essential for all clusters, but rather, the schedule should be guided by participant input. Much of the planned information share sessions were about destination marketing, business marketing, and event planning.

For a cluster that had a different objective, a different schedule of activities should be constructed. In this study, the schedule provided a format for discussion to help the group strengthen its bond and get to know one another on a deeper level. The activities provided participants with perceived value from their participation, as they were developing their knowledge, which in turn, increased their confidence to be able to contribute to a larger project in the future. This is evidenced by the following comments:

R12 (File #32): "I think we've gained more knowledge out of it. Sharing ideas and things like that. It's always good to see … other people's ideas, how they interpret whatever the question is. I think that's good … It makes you think a little bit more outside what you know, normal day to day thing. So, I found that's good. Prompts you to think instead of run on remote control."

R15 (File #33): "I think all participants are learning from this experience. I think we need to learn from any successes or failures we encounter from our event and move forward with the knowledge we have gained and try to improve … I definitely doubted my ability to think creatively and contribute ideas. I still have underlying doubt but much less so now."

R16 (File #34): "While we have considered and discussed these things, we have never documented them as such. So, it was an

Table 3
Outline of schedule of activities.

Session	Scheduled Activity
1	Introductory Content and Overview of Group Plan
2	Event Brainstorming
3	Building a Plan#1- Target Markets
4	Building a Plan#2- Objective Setting
5	Building a Plan#3- Marketing Tools
6	Building a Plan#4- Evaluation Techniques
7	Free Session: (General catch-up as busy week for operators)
8	Collaboration Information and Group Check-In
9	Free Session: (General catch-up as busy week for operators)
10	Final Organized Session

interesting exercise to put it on paper."

R18 (File #35): "I got to know other participants a little better and made new relationships, building business and personal connections."

Step 7 to cluster formation is to decide on tangible group initiatives to work towards. After team synergy was built in Step 4 through activities and information share, the group gathered in a focus group hosted by the facilitator where they decided on a way forward for the cluster. Participants had decided they would like to see a tangible outcome in the form of an event that would contribute to the destination's image, and so planning continued for this.

4.3. Cluster progression phase

The steps in cluster progression are 8–12, and all of these are entirely new contributions to the literature. Steps 8–11 are in a cyclic process, meaning that the steps can, and sometimes will, repeat, until cluster members are ready to progress to step 12. The steps are depicted in Fig. 5, below.

Step 8 to cluster progression is to re-engage the public sector for support with the group project. After the group decided on a tangible group initiative to work towards in step 7, the group then decided to re-engage the public sector representatives to see how they could assist with the event concepts the group had worked on, and how it would coincide with the destination brand for the region. The public sector representatives then offered input and guidance on the event plans that the cluster wanted to work towards, and also offered guidance on how to process the plans;

"The events sound wonderful. The workshops in particular are very much aligned to our hero experiences and key messaging … Re: Event Two – I know you have mentioned tourists will be attracted to the event, but the nature of the event (networking) would lead me to believe the majority of attendees will be locals. I'm not sure if the price point is suitable for locals, but this could be lowered with sponsorship, perhaps from the same organisation you are sourcing the founder/CEO speaker from."(File #45)

After receiving this feedback and more within an email conversation, the cluster made considerations and the necessary changes to the event plans, which lead to step 9. For a cluster that was not working towards an event, public sector representatives could offer input on their particular goal/project, or for a cluster that did not have a particular goal/project, public sector representatives could offer advice on some potential projects the cluster could work on.

Step 9 is to establish objectives and member duties for the project, which involved each member explaining their ability to contribute to the project. During this stage, four participants stopped participating in the cluster, leaving six cluster members plus the facilitator/researcher. Two of the participants who left the cluster had been tapering their contribution from Step 5, and the other two participants provided reasons for needed to leave the cluster;

R9 (File #45): "The past few months have been our busy season and along with having kids we seriously have had no time to do anything other than focus on guest facing work. I know what I'm struggling with the most right now is TIME! Our business simply cannot afford to hire or out-source the work I need to get done, so I'm really bogged down."

R10 (File #45): "I've got so much work to catch up on and being honest, I'm tired, or more like exhausted and just wish I could curl up in bed and the business just take care of itself for a week …"

R13 (File #45): "Over the last few months our focus has changed to one of survival and I feel I am not in a position to give your project my full attention that it deserves. [R14] is trying to build another business and is currently also playing 'teacher' while schools are out, so she doesn't have a lot of free time … For us it's been a very tough 5 years and it is now time to look for a steady income – so that's where our focus is at the moment … I do love organising events but in this present climate my main focus has changed. I am always happy to help a bit further down the line if needed."

Remaining participants confirmed that they were keen to continue and outlined their contribution to continuing the event planning by explaining how they could use their connections, resources, or talents.

Step 10 is to progress the project with communication and teamwork, which saw the participants meeting on multiple occasions to refine the project and making progress towards its delivery. Participants met at a local café [File 28], and during COVID-19 restrictions via Zoom [File 40], to continue to plan the event.

Then, step 11 is to engage additional stakeholders. In this step participants engaged additional local businesses to provide their product/services for the event they were planning. Each of the remaining cluster members (6), engaged 3 local businesses that would come together for the event (as seen below). This stage will look very different for each cluster depending on the project they are working towards.

R11 (File #40): "So, we already spoke with [owner] from [local

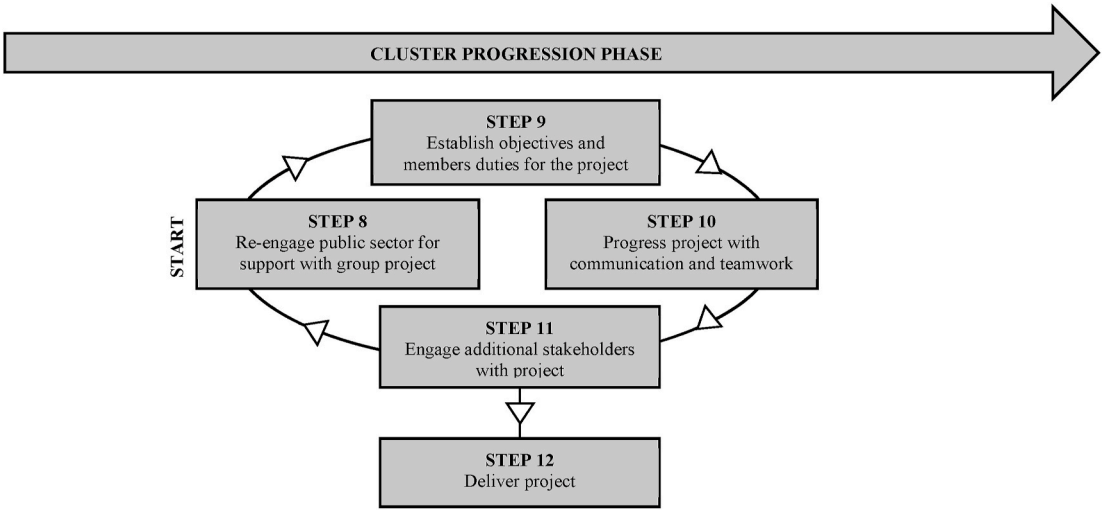

Fig. 5. Cluster progression stage.

business], who at the time when we spoke was more than happy to be involved … And we've also spoken to the people from [local business, and they are at this stage, also keen to host the workshop on potentially germinating seed."

R15 (File #40): "So I spoke to [owner] from [local business] … And she said that she's happy to host a class … I'd be happy to touch base with the baker from [local business]. I know he does classes. Bread making, pastry making and that sort of thing."

R18 (File #40): "I might approach, there is a potter [owner] … he does lovely pottery pieces and he's sold a lot of these pieces down the mill in years past and I'd love to chat to him about having people out there to actually make a wine goblet."

Finally, step 12 is to deliver the project, which, for this cluster, was postponed to March 2021 due to COVID-19. The project will deliver an event called 'Granite Belt Living Lightly' which showcases a series of workshops delivered by local stakeholders that contribute to branding the region as a sustainable tourism destination. Further results will be presented in future papers post the delivery of this event, which has been delayed and to March 2021 due to COVID-19 event restrictions, and is continually modified in line with COVID-safe plans and restrictions. In the meantime, the cluster arranged a collaborative event with Griffith Institute for Tourism, 'Future Normal' Webinar for regional small tourism businesses to adapt to more sustainable strategies, hosted in June 2020. Regardless of the project delivery, participant still feel positively about progress they have made in the cluster;

R15 (File #29): "I feel very positive about the group and the progress we are making. Simple things like meeting the other group members and exchanging ideas has made a positive difference. [I've] met new participants which was terrific and cemented previous acquaintances and feel more like part of the team."

R18 (File # 35): "I got to know other participants a little better and made new relationships. Building business and personal connections."

R17 (File #35): "[I've] engendered some confidence in finding like-minded business people in a new area."

The secondary data analysis completed in NVivo showed a high consensus with the total cluster formation framework phases above, as seen in Fig. 6 below.

Although it depicts a less-linear approach to cluster formation, this NVivo output aligns the phases of total cluster formation depicted by the constructed framework. In this output, the destination branding node has a one-way connecter from business cluster formation, suggesting that business cluster formation feeds into destination branding. And, while this is not untrue, there are actually specific steps where destination branding activities occurred with more of a heightened priority, as the findings indicated. Focus on destination branding activities occurred during Steps 1, 5, 6, 7, 8, 10, 11 and 12 as outlined within the findings, and the NVivo output does not depict this.

5. Discussion

The framework below (Fig. 7) highlights new contributions and expansions to the literature in relation to the total cluster formation process. In 2004, Wolfe and Gertler referred to a striking lack of consensus over how clusters are formed and how they can be set in motion. Until this study, the conceptual clarity of clusters had been improved, other than suggested guidelines by Hawkins and Calnan (2009) which were not been empirically verified. As such, many of the findings offer new contributions to the literature.

Firstly, the total cluster formation framework is an entirely new contribution to existent literature, as no present study has empirically tested this process prior to this. This contributes greatly to both academia and industry, as discussed in detail below in Section 6.0.

The discovery of the three distinct phases (Phase, 1, Phase 2, and Phase 3) to cluster formation is an entirely new contribution to

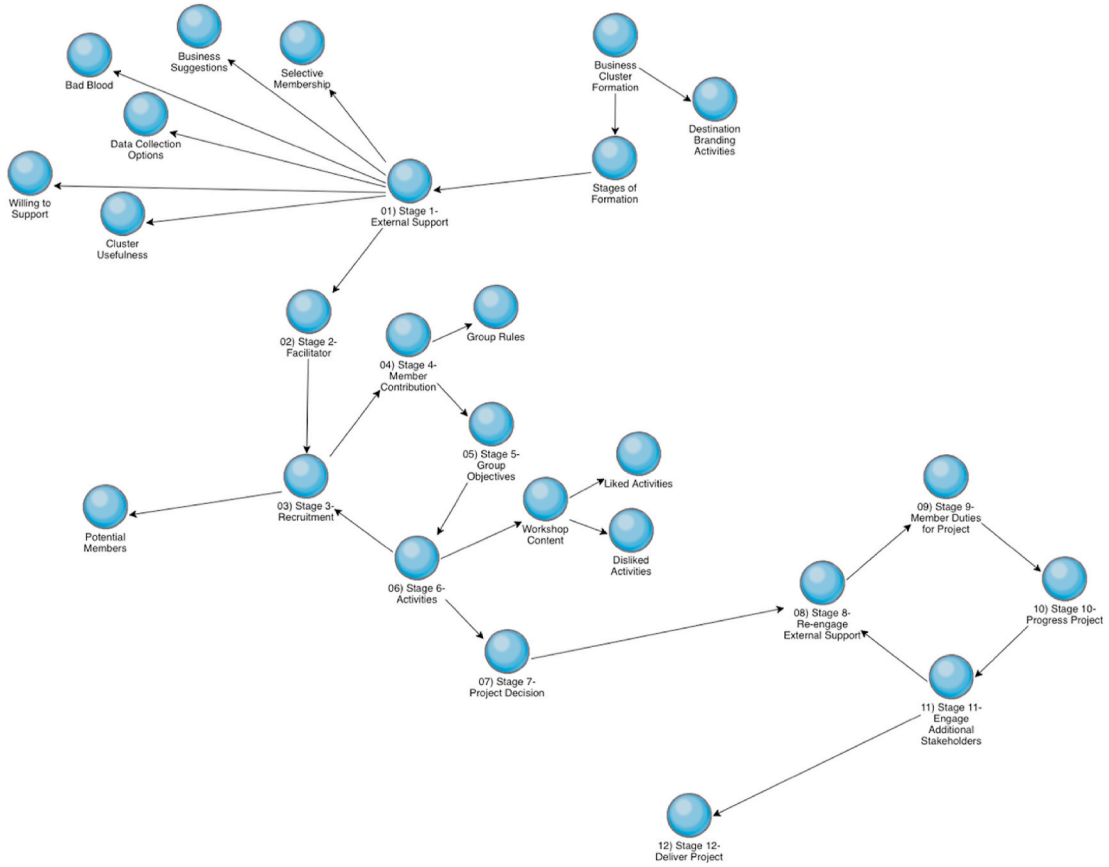

Fig. 6. NVivo output: Node map of formation stages.

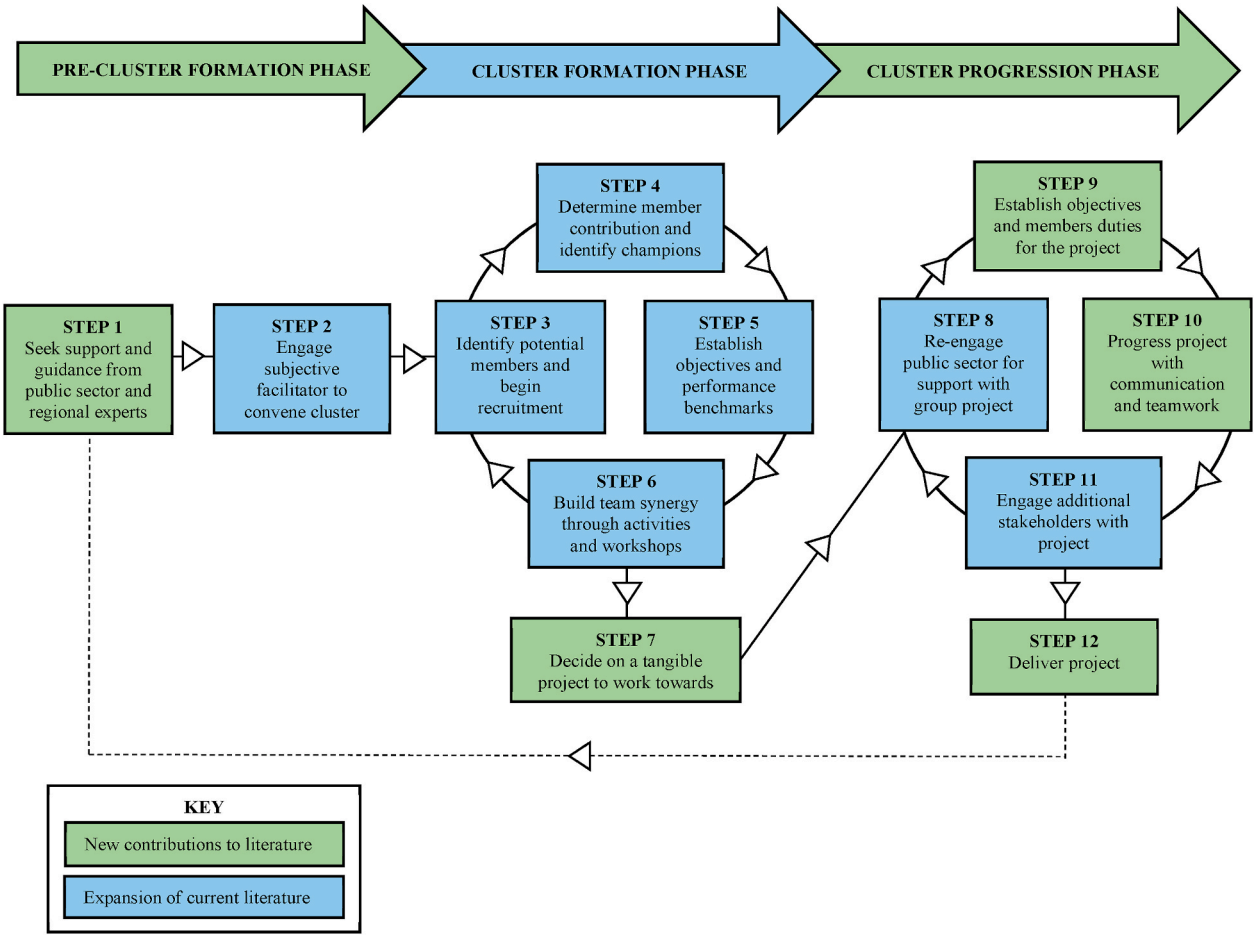

Fig. 7. Total Cluster Formation Model highlighting new contributions and expansions of current literature.

literature, as previous literature had only referred to cluster formation guidelines (Hawkins & Calnan, 2009), without suggesting it may occur in phases. This finding can help to shape future research on collaboration for tourism stakeholders, using this formation model as a foundation for future research to expand. Of the specific phases, Phase 2 and the steps within were an expansion of previous literature, and mostly captured the cluster formation guidelines as suggested by Hawkins and Calnan (2009). Phases 1 and 3 had not at all been suggested in previous literature, although they did possesses stages that had been informed by Hawkins and Calnan (2009) research. Further to this, the finding that Phases 2 and 3 were cyclic in nature and that the steps within these phases could repeat, is also an entirely new contribution to literature, as no literature has previously provided empirically tested cluster formation guidelines. The cluster formation stage constitutes steps 3–7, which align to the suggestions by Hawkins Hawkins and Calnan (2009). In this study, however, these steps are in a cyclic process, meaning that the steps can, and sometimes will, repeat. This cyclic nature corresponds with previous research that suggests collaboration is a circular phase as it grows and evolves (Perkins & Khoo-Lattimore, 2020).

Step 1, 'Seek support and guidance from public sector and regional experts' is an entirely new contribution to the literature. This step was not previously suggested by any authors, and as such, offers critical insight into the beginning of cluster formation. Step 2, 'Engage a subjective facilitator to convene cluster' was informed by Hawkins and Calnan's (2009) research, but proved some things wrong. Firstly, Hawkins and Calnan (2009) suggested to be the Step 1 rather than the Step 2, but seeking guidance from public sector is essential in setting the groundwork for successful and useful cluster formation. Secondly, it proved beneficial that the cluster facilitator was subjective, rather than objective to cluster formation as suggested by Hawkins and Calnan (2009).

Step 3, 'Identify potential members and begin recruitment', Step 4, 'Determine member contribution and identify champions', Step 5 'Establish objectives and performance benchmarks', and Step 6, 'Build team synergy through activities and workshops', which formed Phase 2, were all informed from Hawkins and Calnan's (2009) study and the descriptions of each stage proved very accurate. Step 7, 'Decide on a tangible group project to work towards' is an entirely new contribution to the literature, and is essential in progressing the cluster forward, towards a deliverable outcome.

Step 8, 'Re-engage public sector for support with group project' is a new contribution to the literature, although it took guidance from Hawkins and Calnan's (2009) research that suggested engaging the public sector for policy and regulatory advancements. Step 9, 'Establish objectives and members duties for the project' and Step 10, 'Progress project with communication and teamwork' are both entirely new contributions to the current literature and were critical in describing how the group was progressing towards delivering the project. Step 11, 'Engage additional stakeholders with project' is a new contribution to the literature, although it took guidance from Hawkins and Calnan's (2009) research that suggested engaging the community by educating them on the benefits of tourism. Finally, Step 12, 'Deliver project' is also an entirely new step to cluster formation and was critical for the newly formed cluster to feel a sense of achievement in their contribution as cluster members.

Not only has this research advanced the current state of knowledge on collaboration for tourism stakeholders, these steps can also act as a helpful guide for industry. Having this cluster formation model as a

practical guide offers insights into how the collaboration may progress, some suggestions on when to take certain actions, and mitigating relationships between varied stakeholders who may be involved. The contributions of this research are further explored below.

6. Contributions

6.1. Theoretical contributions: the Total Cluster Formation Model

Firstly, this study contributes to the theoretical discussion of what constitutes collaboration within a regional destination brand context, by exploring the concept of collaboration via a business clustering strategy for small tourism businesses. Current literature emphasizes the importance of collaboration for effective destination branding (Caple, 2011; Saxena, 2005; Telfer, 2001), yet there was still a fragmented understanding of how collaboration is constructed, and how collaborative challenges can be overcome for successful destination branding with authors stating that the conceptual clarity of cluster formation was lacking (Wolfe & Gertler, 2004). This study significantly expands on the literature for cluster by offering a complete framework to guide cluster formation, which includes the pre-cluster, cluster formation, and cluster progression phases. This framework is a new contribution to the literature and is illustrated in Fig. 8, below. The dotted line linking Step 12 and Step 1 suggest that the process can be repeated, although this has not yet been empirically proven.

This model provides an in-depth response to the research question, as it furthers the understanding of the phases and steps of cluster formation. This study contributes to further understanding on how the conceptualization of collaboration via business clustering can contribute to the empowerment of regional small tourism firms in contributing to their destination brand. The formation of business clustering has been evaluated within this study, and thus processes of collaboration with the end goal of contributing to the destination brand have been expanded. This study has offered a resolution to a gap in conceptual clarity, and further, offers a platform for future research in this domain to expand. With continual improvements to the body of literature in this field, academia can continue to provide useful and correct theory and frameworks that guide and offer resolution to industry problems, as well as informing future generations on more effective ways to implement collaboration.

6.2. Practical contributions

This research provides industry with a proven process by which regional small tourism firms can establish a tourism business cluster in the form of a step-by-step guide. The cluster formation model framework created within the case of the Granite Belt region in Queensland is expected to provide governing tourism bodies with a thorough assessment of collaborative destination branding processes for the region as a competitive tourism destination. This project contributes practical implications for small tourism businesses and the regional areas in which they are located-beyond the Granite Belt Region, by offering best practice solutions to collaborative challenges through cluster formation. The purpose of providing a best practice process for business cluster formation and operation is to provide industry with strategies for successful collaboration, so that they can effectively contribute to the overall destination brand of the region. While the research may not necessarily be transferable to all regional destinations, the study provides insights that will be useful to small tourism businesses in many regional areas which are affected by tourism growth, including local councils, local tourism organizations, chambers of commerce and local residents, offering effective ways to grow tourism in a manner that is mutually beneficial for all stakeholders involved.

The final stage of total business cluster formation is project delivery, and for the newly formed cluster in the present study, they event they have planned has been delayed to March 2021 due to COVID-19 restrictions. As such, future papers will report on the clusters ability to contribute to the destination brand and to raise awareness about the region (Caple, 2011; Gardiner & Scott, 2014; Saxena, 2005), and will also report on any increase in tourism expenditure, which is a recognised outcome for regions that have fully adopted clustering (Lade, 2010).

This study has offered a practical solution to an industry issue. Where stakeholders are facing challenges in working together, this paper, and the framework within, can offer a practical guideline on how

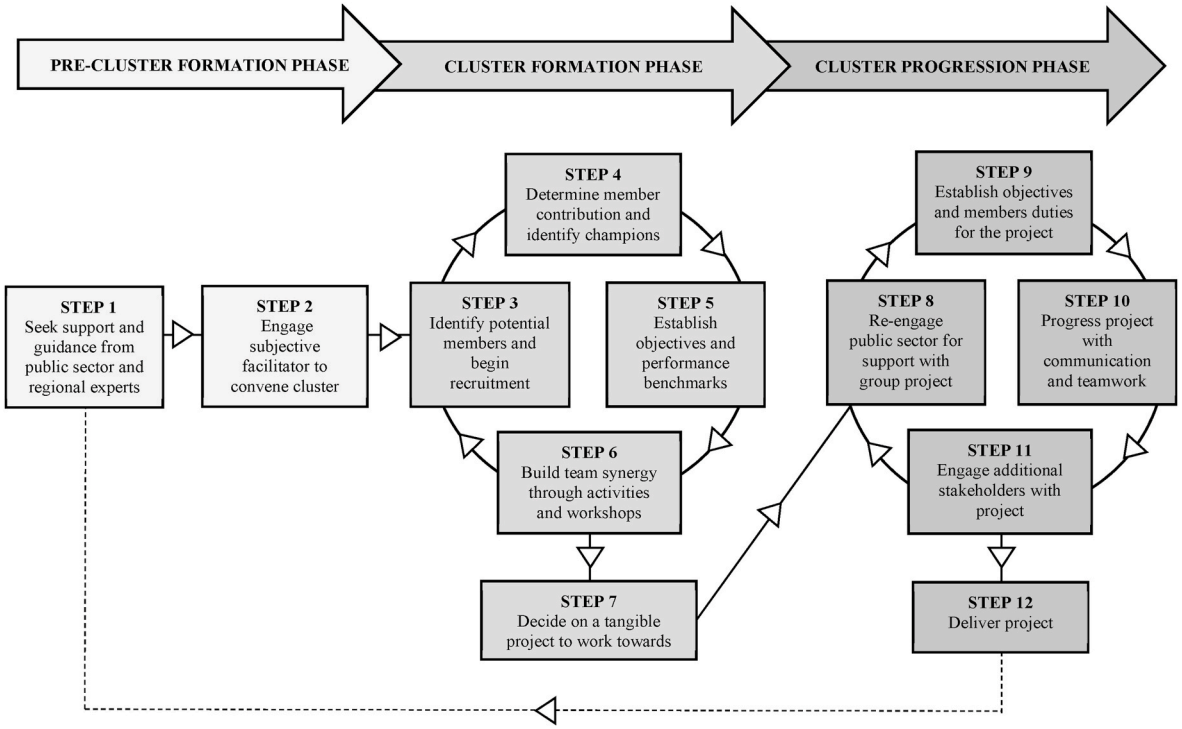

Fig. 8. Total cluster formation model.

collaboration can best be enacted from initiation. For regions where successful collaboration is difficult, or perhaps rarely exists, this framework can be a guiding tool for new collaboration to prosper successfully. This research has responded to an industry problem and thus, has the potential to resolve future issues in this context. In the future, once successful cluster creation is attainable in more regional destinations that have previously struggled to work together, those clusters could inevitably create many benefits for those that participate, and for the regions they belong to.

7. Conclusion and limitations

Time was one of the biggest limitations to this study. There were times during the process where the primary researcher needed to push an agenda to keep the project moving along, and perhaps if the project was not working in adherence to the researcher's timeline, results may have varied. Future research could span a longer period to allow the cluster to develop entirely at participant pace. Next, while PAR proved to be a helpful methodology for this process, it also created an interesting and sometimes challenging power dynamic between the researcher and participants. Furthermore, participants were all at least 15 years older than the primary researcher. Future research could explore cluster formation with a different research methodology or ensure a more similar age range between researcher and participants. Furthermore, there are continual structural changes occurring within governing bodies of the region and as such, frustrations and emotions towards collaboration were often heightened. Future research conducted in different regions could reveal different insights due to different contributions from governing bodies. Importantly, the region was subject to severe drought, bushfires, and COVID-19 during the data collection phase of this study and as such, were focused on survival, disaster relief and recovery, which inevitably diverted focus from the research project. It would be opportune for future research to understand cluster formation post COVID-19, in a 'new normal' business arena. Lastly, it would be beneficial for future research to examine how clusters are formed in different regions using the total cluster formation framework to confirm or falsify suggested phases and steps, enhancing the usability and transferability of the framework.

Despite its limitation, this study has been able to map the phases and steps to cluster formation. This is the first empirical study to examine and understand cluster formation in its entirety, uncovering the pre-cluster formation phase, cluster formation phase, to cluster progression phase, and the steps within each, contributing to the body of literature in this domain. This study presents a clear framework that offers practical guidance to cluster formation, enabling and empowering regional stakeholders to be able to collaborate and combine forces to contribute to destination branding.

Declaration of competing interest

No potential conflict of interest was reported by the authors.

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