Understanding attractions

With the choice of visitor attractions at unprecedented levels, new projects face the daunting challenge of how to position themselves correctly – for the right audience, in the right location, against the competition. We asked Professor Stephen Wanhill, Travelbag Professor of Tourism at the University of Bournemouth and Head of Tourism Research at the Research Centre in Bornholm, Denmark, to present his own conceptual analysis of the sector, based on his most recent research.

Disneyland Paris, a powerful example of imagescape
Photograph courtesy of Disney

The number and range of visitor attractions in the UK alone is vast. But it is possible to classify attractions on a number of levels: ownership, capacity, market or catchment area, permanency and type (some being built for purpose, the majority adapted for purpose). In the countryside, historic buildings, including castles, palaces, churches, stately homes and even completely walled medieval towns, such as Carcassonne in France, compete for visitors' attention, along with a variety of early industrial sites, all of which are capable of satisfying the public's interest in bygone times. In urban centres, museums and art galleries are to be found in profusion and many are subject-specific (the National Portrait Gallery in London or Chicago's Museum of Science and Industry, for instance). Industrial buildings, disused market halls, railway stations and docks located close to urban centres have increasingly been transformed into tourist zones, which serve both visitors and residents alike. Since shopping is an important tourist activity, the focus has been on speciality shopping, intermingled with hotels, leisure attractions and business facilities, such as convention centres, exhibition halls and trade centres.

In this way, tourism has gone some way to replacing manufacturing and distribution industries, which in some cases have left the inner core for more spacious and cheaper locations on the outskirts of the city and in others disappeared from the city full stop. Tourism has proved to be a feasible economic option for urban waterfront regeneration, as seen in the development of Baltimore's Inner Harbour, South Street Seaport in New York, Darling Harbour in Sydney, and the Victoria and Alfred Wharf in Cape Town.

Over and above the man-made attractions left by historical legacy, there are numerous artificially engineered attractions, the principal role of which is entertainment. These attractions are user-oriented, of various scales, with some capable of handling thousands of visitors per day: they include theme and leisure parks (Corze, 1989; Durlacher, 1994), sporting venues, theatres (Hughes, 1989) and all-weather holiday centres. Theme parks may also include an 'edutainment' function, as evidenced by EPCOT in Disney World, as well as providing exciting 'white knuckle' rides in the form of roller coasters, runaway trains, log flumes and oscillating 'pirate ships'. But essentially they are about 'fun', for such parks are the modern form of the travelling fairs of yesteryear that have been made obsolete by technology, laws on safety, and duties of care to the public.

We know that ultimately visitor experience is the marketed output of tourist attractions. The quest to improve the attraction experience forces theme and leisure park operators to install more complicated rides and challenging entertainment as the public seeks to increase the skill content of their consumption. Similarly, historic properties, museums and gardens change their displays and feature special exhibitions and events to maintain interest. Some attractions are fortunate enough to be able to link into themselves regular events aimed at an enthusiast market, such as automobile rallies, for which demand is more or less continuous.

Attraction markets and imagescapes

What is an 'imagescape'? The term 'imagineers' was coined by the Disney Corporation to describe its designers (Kirsner, 1988). Similarly, it is possible to describe a product's concept and design as an imagescape. There are wide variations in the appeal of imagescapes, which are inextricably bound up with the market assessment as indicated in the model below, and vice versa.

Thus, while there is a clear demand for entertainment attractions, success is related to the creativity of the design and its appeal. The point at issue is that goods and services provision is not enough; value is added by creating and selling experiences.

The Market–Imagescape Mix

Imagescape / Market	Current	New
Current	QI 'Me too' attraction	QII 'Grand inspiration' attraction
New	QIII 'New version' attraction	QIV 'Wonder' attraction

This model has already demonstrated its use through application to industrial heritage attractions. By positioning attractions in terms of the above matrix, much can be understood about the success criteria, because many of the elements that would be included in an attraction feasibility study are subsumed within it. Thus, location is clearly linked to market assessment and imagescape; heritage attractions, by their very nature, may have little choice as to their location, whereas some created entertainments are reasonably footloose and must seek to locate where they can maximise visitor potential. The latter is not an easy task where grand concepts that require large visitor numbers are concerned, because the lack of available sites may make the project unworkable. In like manner, the further away the project is from the centre of the market, the more appealing and exciting the design concept has to be in order to 'pull' visitors in.

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'Me too' and 'grand inspiration' attractions

The common attraction experience is the first quadrant in the model, since this involves least risk, which in turn has implications for finance and operational viability. There is always a danger that the 'me too' approach can saturate the market and can result in non-viable attractions that end up wasting resources. Market assessment must therefore take account of economic factors such as price, location and the degree of competition. Moreover, such developments may not get public sector support because of questions over displacement of visitors from other tourist facilities. Thus, even tried and tested concepts in this quadrant remain dependent on there still being growth in the market, or on having a market that is spatially divided. Old concepts work in new destinations, such as Legoland in Windsor, but new imagescapes are needed to move forward in established destinations.

One of the difficulties of starting attractions in the second quadrant is assessing whether the 'grand inspiration' will work as a concept or whether it is simply the 'single genius' approach to project development, which could be an indulgence that is unnecessarily or unrealistically costly in terms of what the market can afford. A common strategy in this area is to try to turn the project 'upside down' by estimating the volume of visitors needed to make the project feasible at a price the market is prepared to pay.

'New version' attractions

All attractions need to rejuvenate themselves once the public becomes too familiar with the product. This is a defensive strategy to retain existing attendances, requiring careful monitoring of key market trends affecting attractions, including:

- continued growth in multiple, shorter vacations;
- the rise in the allocation of the household budget to 'quality' leisure time;
- the increasing influence of children on the use of leisure time in families with both partners working;
- growth in concern for environmental issues and recognition of the need for sustainable environmental management practices.

Clearly, markets in themselves are not static. The key question for 'new version' attractions is whether by, for example, their use of new technology for better visual interpretation, experiences and sales, they are leading the market or simply catching up, in terms of product formulation, the

Wonder attractions can flow from the success of other products, such as the Disney characters
Photograph courtesy of Disney

Disney characters were well established in the entertainment industry and in merchandising long before the development of the leisure parks,as was the Lego brick

communications proposition and the channels of communication. Meeting the needs of new markets may require a much greater leap forward in terms of concept development for the new version.

'Wonder' attractions

Maximum uncertainty holds in the fourth quadrant of the model: only very large attraction operators, such as the Disney Corporation, or the public or quasi-public sector, can fund these projects. The current spate of 'Millennium vision' attractions, sponsored by the Heritage Lottery Fund in the UK, falls into the latter category, though not necessarily to good effect. Even here, private corporations are careful to limit their financial exposure, as in the case of Disneyland Paris. Usually, such projects proceed with public sector support so as to spread the risks and help draw in external finance.

European countries offer some form of investment support to new tourism projects (Wanhill, 1997) and there are also many other areas where the task facing the public sector is to set the 'right climate' for tourism development (Wanhill, 1995). Many museums, gardens, sports stadiums, opera houses, market square and harbour developments are offered as public goods for the purposes of economic regeneration, and so normal commercial criteria apply only in part. Their evaluation may be based principally on their economic impact in order to assess their contribution in stimulating the local economy, though this may not necessarily reflect their intrinsic value as contributing to the 'cultural stock' of the nation. Thus, an 'avant-garde' art museum, such as the Louisiana in Copenhagen, may be the result of a socio-political decision that draws in both the state and wealthy patrons, though there are techniques such as Contingent Valuation that try to measure the economic worth, in terms of willingness to pay, of such 'wonder' attractions.

Market assessment for such unique attractions is notoriously difficult; for example, the estimates of visitor numbers for the Millennium Dome in London ranged from 9 million to 17 million. Twelve million was the figure that the Government was prepared to accept and budget for, on the basis that it was meant to be a public festivity, so that everyone who might want to come should be able to do so. In these circumstances, developing project scenarios so as to give a thorough understanding of what is being proposed and the risks involved is more important than the data projecting current trends. It appears that some of the most successful 'wonder' attractions are those that follow the reverse product development model that is so common in the service sector.

Namely, existing products, which have been developed for other purposes and in other industries, are adapted to provide an attraction experience with the aid of new communication techniques. Thus, the Disney characters were well established in the entertainment industry and in merchandising long before the development of the leisure parks, as was the Lego brick. National museums and galleries also follow this formula by presenting objects and works that already have a high intrinsic value and awareness in the public's mind, in ever more stimulating ways. On a smaller scale, there are numerous instances where companies whose products have a strong brand image have opened their doors to visitors and, in so doing, have subsequently created specific tourist attractions around their products through brand extension. The benefits of this can be found in the improvements to cashflow that visitors bring, which can compensate for payment delays resulting from the normal credit cycle and gestation time arising from the industrial production process.

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