John Swarbrooke
is principal lecturer in tourism
management at Sheffield
Hallam University, and
professeur visitant at IMHI,
ESSEC/Cornell University,
Paris. He is author of a text
book 'The Development and
Management of Visitor
Attractions'.

Keywords:

tourist attractions, visitor
attractions, competitive
advantage, quality, future
challenges, UK market

Key challenges for visitor attraction managers in the UK

John Swarbrooke

Received (in revised form): 4 May 2001

Abstract

The UK has, in recent years, seen a rapid increase in the number of visitor attractions of all types. Some of this growth has been fuelled by National Lottery funding, and a number of these new attractions have been well-publicised failures. Furthermore, unfortunately this increase in supply has not been matched by market growth. This has put pressure on existing attractions as well as making it difficult for new venues to break into the market. It could be argued that the UK attractions market has never been so competitive. At the same time, the customer is more experienced, knowledgeable and demanding than ever before. These factors provide the context in which today's UK attraction manager works. This paper highlights some of the key challenges facing these managers today, and which will continue to affect them in the future.

INTRODUCTION

Visitor attractions are the core of the tourism industry. The reason tourists travel at all is to visit attractions, whether on a day trip, a weekend break or the annual holiday. Hotels, restaurants and so on are all important, but they are secondary to the attractions which provide the primary motivation for tourist trips.

Attractions can be sub-divided in four ways, as can be seen in Figure 1. This paper will focus on the man-made attractions that are purpose built to attract visitors. However, the challenges facing

Figure 1: The four types of visitor attractions

John Swarbrooke
School of Sport and Leisure
Management,
Sheffield Hallam University,
1140 Owen Building, City Campus,
Howard Street,
Sheffield S1 1WB, UK
Tel: +44 (0)114 225 3976
Fax: +44 (0)114 225 2881
E-mail: j.s.swarbrooke@shu.co.uk

the managers of other types of attractions must also be recognised. For managers of natural attractions and man-made attractions that were not originally designed to attract tourists, their popularity as attractions is often their major problem. The major challenge for their managers is often how to balance tourism with the conservation of the site. For event and festival managers the main challenge depends on the nature of the event. If it is a traditional event, then the challenge is to maintain the spirit of the event while meeting the needs of today's visitor. If it is a new event, such as a community arts festival, then the challenge is to reconcile the needs of both local residents and visitors.

One final point which needs to be cleared up before moving on to delve deeper into the subject relates to terminology. Should they be called visitor attractions or tourist attractions? The answer is the former because attractions receive both tourists — those spending at least one night away from home — and visitors, in other words, those on day trips.

Having established this point the paper now moves on to look at a typology of physical, man-made attractions whose main purpose is to attract visitors. This typology is illustrated in Figure 2. This is not a comprehensive typology but it does highlight the diversity of attraction types.

The situation is also complicated by the existence of three different types of attraction operators, as follows:

- the private sector, whose aim is primarily making profits out of the attraction business
- the public sector, whose objectives are wider and include

Figure 2: A typology of man-made physical attractions whose main purpose is to attract visitors

**Visitor attractions not
tourist attractions**

**A typology of
attractions**

education, conservation, urban regeneration and rural development

- the voluntary sector, which often uses attractions as a means to an end — namely, income from tourists can help to achieve the real objectives, which may be conservation or education, for example.

Clearly the challenges facing managers will vary somewhat depending on which of these sectors they work in.

THE IMPORTANCE OF VISITOR ATTRACTIONS IN THE UK

Visitor attractions play an important part in UK society and the economy in a number of ways.

The importance of attractions to UK society and the economy

- They employ tens of thousands of people, often in places where there are few other job opportunities.
- They are usually a catalyst for the development of tourism in an area, which then creates further jobs in the sectors which service the needs of the tourist.
- They are being increasingly used as tools of public policy, to stimulate urban regeneration and rural development. In recent years, Millennium Commission and National Lottery funding has supported numerous projects designed to stimulate urban/rural economies, such as the Eden Project in Cornwall, the Royal Armouries in Leeds, and 'Magna' in South Yorkshire, as well as the infamous Millennium Dome in Greenwich.
- They provide stimulating leisure activities for the population and encourage people to spend lavishly on entrance charges, catering and retailing, thus helping to fuel local economies.

The rapid rise in the supply of attractions in recent years has made their operators become more 'professional' and commercially minded as they have seen their competition increase. This is particularly true in the public sector, where reductions in government subsidies have led to pressures for attraction managers to behave more 'commercially'.

At the same time, national government, concerned to maintain the UK's position in the increasingly competitive international tourism market, has become ever more interested in the quality of attractions. The government's tourism strategy, *Tomorrow's Tourism*, identified a need to 'improve the quality and range of tourist attractions'. This led to the development of the 'Action for Attractions' initiative by a government agency, the English Tourism Council. This project will be discussed in greater detail later in this paper.

The role of the Government in the UK attractions sector

It is therefore an appropriate time to take a critical look at the challenges being faced by visitor attraction managers in the UK.

THE KEY CHALLENGES FACING VISITOR ATTRACTION MANAGERS IN THE UK

Figure 3 illustrates some of the challenges facing UK attraction managers — each will be discussed in a little detail in this paper.

The growth of competition and the need to find new competitive advantage strategies

Most attraction managers in the UK would probably say this is their major current challenge, given that the attraction business has become much more competitive in recent years. To understand fully this statement about the growth in competition a little more needs to be recognised about the nature of competition in the attractions sector.

Taking a hypothetical example of, say, a theme park in Yorkshire, its competitors could be said to include the following.

- Any leisure activity that offers a similar set of benefits to those offered by the park, to a similar target market within Yorkshire, as such a park would rely significantly on its local market, and on inbound tourists, for its visitors. These activities could include a visit to a safari park for a family, for example, which would combine excitement, fun and a sociable atmosphere.
- Any leisure activity that offers a similar set of benefits to a similar target market in the neighbouring regions of the Midlands, north-west England, and north-east England, as the park would also hope to attract visitors from the adjacent

The nature of competition in the attractions sector

Figure 3: The key challenges facing visitor attraction managers

regions. So competition for the park, in the family market in north-west England, for example, could come from families in that region visiting a seaside resort such as Blackpool.

The same principle can apply to other attractions. A family who want to learn more about nature can choose to visit a farm attraction or zoo, or simply take a walk in the countryside.

**Home-based leisure
as a competitor for
attractions**

It could be argued that competition for attractions goes even further than this, and includes activities that take place in leisure time in the home. Looking at the family again, if the daughter is studying Tudor history at school, the parents can help with her education by visiting a museum or Tudor stately home, or by buying her specialist software that she can study in her bedroom on her PC. Home-based entertainment is now a real threat for attractions — homes have been made so stimulating that now it is hard to see why families should leave them!

Less direct competition also comes, in terms of the family for example, from other leisure activities that have grown in popularity, at least with parents. These activities take place on Sundays in particular, given that this is still the main day for family visits to attractions, and include visiting DIY centres, supermarkets and garden centres, for instance.

**Disneyland Paris is
not really a
competitor for UK
attractions**

However, many attraction managers still seem to take a traditional view of what constitutes their competition. They tend to see it in terms of similar types of attraction, no matter how far away they are. In the past, UK theme park managers sometimes suggested that they were competing directly with Disneyland Paris, for example. The author does not believe this is true — UK theme parks are primarily day-trip attractions with visitors travelling less than three hours to visit them, and being home in time for bed. They are therefore *visitor* attractions. For British people, on the other hand, Disneyland Paris is a short-break destination usually involving several days away from home. The cost of a family trip to the latter is also likely to be as much as ten times that of a visit to their nearer theme park. Thus for the UK market, Disneyland Paris is a *tourist* attraction.

Furthermore, even many theme parks in the UK are not directly competing with each other. For example, the catchment areas of day trips to Chessington World of Adventures in the South East and Camelot in Lancashire are unlikely to overlap very much at all.

In most industries when looking at competition, the question of price plays a major role. Competition may well be defined in terms of those charging a similar price. This approach works less well with attractions because:

**Pricing and
competition in the
attractions sector**

— visitors take into account not only admissions charges when making decisions — they will also think about travel costs and likely secondary spending on gifts and food and drink, and will take into account whether the visitor pays one inclusive price, or

- whether there are 'extras' on top of the admission charge such as car parking
- it appears that visitors are more concerned with the idea of 'value for money' rather than simply price
- subsidies mean that often visitors do not pay a market price for the product they enjoy.

There could also be said to be competition between different 'generations' of similar types of attraction. For instance, traditional museums are trying to compete with modern heritage 'experiences' which tend to tell historical stories in very different ways to the traditional museums. Permanent physical attractions, such as theme parks and museums, also face competition from special events and festivals that are temporary, but which may appeal to a similar target market. It must also be recognised that competition is also affected by uncontrollable factors, such as the weather. For example, an under-cover museum will do better than an open-air museum with a similar theme if the weather is bad.

Managers must take a broader view of competition

The author believes that some attraction managers have to start taking a broader view of competition than they may have done previously. It is clear that competition in the attractions business is a complex issue, but there is no doubt that competition for attractions of all types has grown in recent years. The reasons for this growth include:

- the increase in the supply of physical attractions in the UK, from farm-based attractions to leisure shopping outlets, hands-on science centres to art galleries
- the pressure on publicly owned attractions to become more commercial and increase their income has led to such attractions being more aggressive in their marketing
- the growth of leisure activities such as walking, mountain-biking, gardening and DIY, which are not attraction based
- the rapid development of home-based entertainment which is making the home a leisure attraction in its own right, such as satellite TV, DVDs, computer games, CD-ROMs and the Internet.

The need for new competitive advantage strategies

Traditionally, attraction managers have placed great faith in discounting, special offers, advertising and brochures to achieve competitive advantage. With customers becoming increasingly experienced and sophisticated, and a growing number of competitors, other forms of competitive advantage strategy seem to be becoming more relevant, including:

- product differentiation, where the attraction is made very different to others, so visitors can no longer compare it and its competitors purely in terms of price; this differentiation can be achieved in many different ways, for example, state-of-the-art

Cooperation is the best approach for smaller attractions

- hands-on technologies in a museum, or the latest ‘white-knuckle ride’ at a theme park
- making use of the latest marketing techniques, such as relationship marketing and the Internet
- focusing on the quality of the service element of the product.

Many smaller attractions are also recognising that, in a world where big attractions dominate the market, there is an argument for saying that cooperation can be better than competition. Marketing consortia involving small attractions pooling their resources to mount joint cooperative marketing campaigns are an example. This way, together, they can compete on more equal terms with the major players. These consortia can be based in certain geographical areas and/or particular types of attractions.

One thing seems certain, competition will remain the major challenge for attraction managers for many years to come.

In a way, all the other challenges discussed in this paper can be seen as ‘spin offs’ from this central key challenge, beginning with the issue of ‘unfair competition’.

‘Unfair competition’

Like many industries, the attractions sector is made up of a small number of large players — such as the Tussauds Group — and a large number of small players. Unlike many other industries, these players come simultaneously from the public, private and voluntary sectors, as was seen earlier in this paper.

This complexity of ownership structure is part of the reason why some people argue that today there is ‘unfair competition’ in the UK attractions market. Perhaps the author can best illustrate this argument by looking at the case of the following three hypothetical attractions:

- a medium-sized privately owned theme park which is not part of a larger company and receives no public subsidies
- a local authority which does not have the resources to subsidise its museum and has to try to make it profitable
- a small voluntary sector attraction that relies on voluntary labour and donations from supporters to survive.

All three could argue that they face ‘unfair competition’ because of:

- the Millennium Commission and National Lottery funding of major attraction projects with which they are now in competition
- government policy that allows, indeed requires, major national museums to give free admission to children, and provide subsidies to support this policy; many people want to see this free admission extended to adults at all publicly owned museums, which will make such competition even more ‘unfair’ for other attractions

- the subsidies given by some public bodies which artificially keep down the admission charges of attractions they own
- their lack of bargaining power *vis-à-vis* the large attraction operators, in terms of everything from buying stock for their souvenir shops to negotiating sponsorship deals.

It could be suggested, in response, that these issues are the result of perfectly legitimate factors such as democratic political decisions or market forces. Nevertheless, to the three hypothetical attraction managers it may well appear that the field on which they play slopes steeply in their opponents' favour.

Attracting and retaining good staff

In a service industry like the attraction business, it seems obvious that attractions will need to recruit and retain good staff to be successful. This view is reinforced by commentators who suggest that the success of the Disney attractions is partly due to their having better quality staff than their competitors.

Yet the attractions sector in the UK does face human resource problems which make it difficult to attract and retain good staff, including the following.

Human resource challenges in the attractions sector in the UK

- The fact that because of the weather and other factors, many attractions are seasonal and rely on casual staff who only work at the attraction for a few months and are then gone. It is difficult to gain high levels of commitment from such staff, who are often young and inexperienced. This seasonality also makes it difficult to offer good staff a clear career path involving permanent employment and promotion.
- Because of the use of casual labour, and the pressures on staff time during the peak season, some attractions offer little by way of formal induction for new staff, or detailed, structured training programmes. This lack of training can lead to poor work performance and demotivated staff.
- Pay levels are often low, partly reflecting the fact that most operational employment in the sector is low skilled. This means that many staff may simply work at an attraction until a better-paid job comes along.
- Retaining good staff is also made more difficult by the fact that many attraction jobs are rather mundane and dull. For instance, imagine being a guard/attendant at an art museum and having to monitor visitor behaviour day in, day out. Some museums have developed an interest level in these jobs, of course, by encouraging attendants to interact with visitors, but many others do not.

There are several areas where attraction managers need to pay particular attention today in the human resources field.

The problem of *ad hoc* recruitment

Recruitment can be carried out in an *ad hoc*, crisis-management way when a vacancy arises which needs to be filled quickly. The problem is that, with permanent staff in particular, recruiting the wrong person has a great long-term cost, particularly in terms of customer service. Attraction managers need to make greater use of person specifications and innovative approaches to selection to ensure that they recruit the right people in the first place. For example, a candidate for a job which is essentially practical should be encouraged to demonstrate their skills rather than merely talk about them in an interview.

Once appointed, a staff member needs to be properly inducted, so they know company policy and understand their role in the organisation. Then they need to be constantly motivated by regular performance reviews, financial and non-financial incentives, and praise where it is due.

Job satisfaction can be increased by the rotation of jobs and multi-skilling. This also helps to ensure that if someone is off sick, there will be someone else on the site who can do their job.

So far, this review has focused largely on operational staff, but supervisory and management staff also pose some challenges:

The need for management training and education

- Often staff are promoted to supervisory roles on the basis of their performance in a particular job, usually with little training for their new role. This can lead to under-performance and resentment from other staff.
- As yet, with the exception of the museums sector, there is little advanced management education provision tailor-made for the needs of attraction managers, covering skills such as financial management, marketing, human resource management and strategic management. This is a real issue at a time when competition is growing and many attractions are facing a difficult future.

In longer-established, more formalised sectors of the attraction business, such as museums, the problems can be very different. Training tends to be better than in other sectors and there is much less reliance on casual labour. Here the problem is often one of culture, with hierarchical structures and rigid demarcation of jobs. However, things are changing rapidly as museums become more like commercial attractions.

Having looked at the human infrastructure of the attractions sector, it is now time to concentrate on the physical infrastructure, and the question of design.

Designing attractions that work

Many new attractions today have bold designs which stimulate the senses and challenge the visitor. The Guggenheim Museum in Bilbao is a good example of this phenomenon, as was the Millennium Dome. However, to be successful, attractions have to be more than be visually

striking. Some of the objectives of attraction design are illustrated in Figure 4. Obviously all designs are a compromise between the objectives shown in this diagram, the project budget, and the tastes and preferences of the attraction operator.

It could also be argued that, in future, attraction designers should, profitably, carry out more market research before designing attractions, to ensure that their designs will meet the needs of user groups. One of the areas where attraction design is particularly important is in meeting the needs of visitors with special needs, and it is this subject that will now be considered.

Welcoming visitors with special needs

While much remains to be done, considerable progress has been made at attractions with regard to visitors with different types of special needs, especially disabilities. For example:

- ramps and lifts have been installed for visitors who have mobility problems
- induction loops have been fitted for the benefit of customers with impaired hearing
- visitors with sight difficulties have been helped by Braille signing and sensory exhibits in museums.

However, these developments have been seen largely at particular types of attractions, notably:

- those developed with government or European Commission funding where such provision was a condition of the funding
- publicly owned attractions which want to facilitate access to all groups within the community on whose behalf they operate

Help for visitors with disabilities at attractions

Figure 4: The objectives of attraction design

- large attractions operated by organisations with the financial resources to invest in the necessary facilities.

However, it is important not to make the term ‘special needs’ synonymous with disability alone, as this can be seen as well-meaning discrimination. It could be argued that most visitors have special needs that require extra consideration on the part of attraction operators, notably:

‘Special needs’ is about more than disabilities

- visitors whose first language is not English, who require information in their own language
- parents with babies, who require changing facilities and a bottle-warming service
- visitors with special diets, who require suitable catering services.

In the current era of consumer-led marketing, when consumers are told that database marketing means that everyone can now be their own market segment, perhaps a broader view needs to be taken of special needs. Every visitor, and potential visitor, should be seen as being unique, with their own particular ‘special needs’. This could lead to a change in philosophy which would see ‘visitors with special needs’ going from being seen as a marginal issue to being a central concern for attraction managers, which should in turn lead to all customers being more satisfied.

Quality and customer-related are inter-related

Quality and customer satisfaction

These seem to be the buzzwords of management in all industries today. The two terms are clearly related, in that quality is concerned with the product an organisation offers, while customer satisfaction focuses on customer responses to this product and whether or not it meets their expectations. The latter is obviously of paramount importance, and attractions should make sure they do not repeat the mistakes of some other industries which have a production-led rather than a customer-driven approach to this subject.

The first main point to make is that relatively little is known about what factors determine visitor satisfaction at attractions in terms of empirical research, although anecdotal evidence and the opinions of professionals exist.

It appears that customer satisfaction at attractions involves the following.

- Offering perceived value for money to the visitor, where the trade-off is seen as positive between the price paid and the benefits received. For example, a unique exhibition at a museum or a theme park that offers a full day’s entertainment could justify a high entrance charge and be seen as ‘value for money’.
- Reliability, in other words that the elements of the attraction, whether they be rides or interactive exhibits, for example, are working throughout the visit.

- Having transparent pricing policies where the visitor is made fully aware of what the price includes and any ‘extras’. Visitors also seem to appreciate ‘all-inclusive’ prices.
- Having good support services such as car parking, toilets and reasonably priced catering outlets.
- Minimising queues and delays at the entrance and at the most popular on-site attractions, whether they be rides or shows.
- Dealing with problems efficiently and quickly, given that time is of the essence to visitors spending only a few hours on the site.

The importance of service and staff

At attractions with a high personnel service element — such as stately homes with compulsory guided tours — the interpersonal and professional skills of the staff performing the service are of paramount importance. A good guide can create a memorable visitor experience, and vice versa. However, most service encounters in the attractions business are shorter and less interactive than the guide example. Here technical competence and politeness are all that will be required to satisfy visitors.

In terms of service, customer satisfaction at attractions is a matter of providing an appropriate level of service for the needs of the customer, and always delivering the service that is promised.

Customer expectations change over time

Another important issue for managers is recognising that customer expectations change over time, and satisfying tomorrow’s customers will mean anticipating their future expectations now and planning accordingly. For example, ten years ago a museum with a few interactive exhibits would have exceeded the expectations of most visitors, particularly young people. Now, unless there are lots of such exhibits they will often fail even to meet the expectations of the majority of their visitors of all ages. Tomorrow’s museum will probably need to offer sophisticated virtual reality (VR) experiences to satisfy its clients.

This leads to another interesting point. In the past, meeting customers’ expectations tended to satisfy visitors. Today, however, many customers expect their expectations to be exceeded, even though their expectations themselves have risen.

The need for more research

Finally, attraction managers cannot expect to satisfy their visitors if they do not do more systematic research to gain data on the expectations of their visitors and their reaction to the product they consume. This research needs to:

- be continuous so that trends can be identified
- make use of techniques such as focus groups, consumer panels and observation of visitors’ on-site behaviour
- result in action, and visitors being made aware of how their views have brought about changes in the product
- recognise that different market segments have different expectations.

The importance of virtual reality

Embracing new product technologies

Technology is as important in the attractions business as in any other modern industry, and technological developments are shaping the future of the attraction product.

VR has already arrived in theme parks with a wide range of simulator experiences. But as this group of technologies develops, their role in attractions will grow. Museums will increasingly use VR to bring history to life, and theme parks will look to more and more sophisticated VR 'rides'.

Furthermore, if these technologies overcome their current limitations — cost, the lack of senses such as smell, and the fact that most experiences are not group based, or particularly interactive — the growth of VR 'worlds' or all-VR 'fantasy' resorts could be seen. Managers need to think now about how VR will influence their customer expectations in the future and how they can make most cost-effective use of it.

Attraction operators also need to be aware of other technological developments that will affect their product. This can mean everything from the latest computer software for interactive museum exhibits to food production technologies for the catering outlets.

Utilising the latest promotional techniques

The way attractions are promoted is often still quite traditional but the latest developments in promotional techniques need to be used, notably:

- the Internet, which allows attractions to update their marketing messages regularly and can be used for visitors to book admission tickets directly, in advance of their visit
- direct marketing targeting specific messages to particular customers based on databases held, or purchased, by the attraction
- developing relationship marketing by building a link with existing and past visitors and by offering them incentives to visit more often, just like the airlines have used such programmes to gain brand loyalty from air travellers
- developing marketing consortia with other attractions so that they can pool their resources to create a larger, mutually beneficial impact in the marketplace.

Media relations

It could be argued that the Millennium Dome's perceived failure was due, in large part, to the negative media coverage it received before it opened, and even after its opening. This undoubtedly put people off visiting and was in contrast to the generally positive view of those who visited the Dome.

The media plays a major role in the UK today in influencing how people spend their leisure time and money. Attraction

managers therefore need to be experts at handling the media in terms of:

- getting the best possible coverage of the development and launch of a new attraction
- feeding ‘good news’ stories about the attraction regularly to the media
- having a clear plan for how to deal with the media in case things go wrong and there is a crisis, such as a death or an accident on a theme-park ride
- developing mutually beneficial joint promotions with the media where readers/venues/listeners to newspapers/TV programmes/radio programmes receive free tickets in competitions or sales promotions.

Developing the ‘wow factor’ and the ‘unique selling proposition’

Partly to attract media coverage, and partly to ensure competitive advantage, it appears that attractions need something unique, a so-called ‘unique selling proposition’ (USP). They need at least one element that makes the visitor go ‘wow’, something that makes a real, lasting impression on the visitor and leads to word-of-mouth recommendations to friends and relatives.

A unique selling proposition can also be the ‘wow factor’

USPs could include a theme park being associated with a particular theme or character, while a ‘wow’ factor could be a particularly exciting ‘white-knuckle ride’.

Often, something can be a USP and give a ‘wow’ factor simultaneously. When Wigan Pier first opened in the 1980s it had a company of six professional actors who interpreted history for visitors. At the time no other attraction had such a resource, so it had its USP. The actors were so good, particularly in the Victorian schoolroom ‘set’, that they were also a ‘wow’ factor.

However, USPs and ‘wow’ factors can be copied and developed by other attractions, so they can result in only a short-term advantage, after which the management must find a new USP and a new ‘wow’ factor.

‘ACTION FOR ATTRACTIONS’: A CRITICAL EVALUATION

Having identified the key challenges facing attraction managers in the UK it is time to look at the government’s policy for attractions.

The UK government in the late 1990s realised the importance of attractions for the tourism industry in the country. It set up the ‘Action for Attractions’ initiative, where the English Tourism Council, the government’s tourism development agency for England, worked with leading attraction professionals to develop recommendations to help attractions in England become more successful in the future.

While specifically relating to England, the recommendations could perhaps be seen to be relevant to the UK as a whole because

in its tourism strategy for the whole of the UK, *Tomorrow's Tourism*, the government identified a need to improve the quality and range of visitor attractions in the UK 'as part of its drive to maintain the UK's competitiveness in the world market'.

The 'Action for Attractions' initiative resulted in 16 recommendations covering market research, visitor satisfaction, management skills, benchmarking and quality, funding and investment, taxation and planning.

The first set of recommendations relates to improving the quality of data on the market. The report sensibly focuses on the need for supply information and market measurements. However, it is a pity that the report did not also identify the need for more research on:

- trends in demand
- how visitors make their decision about which attractions to visit.

The important section on improving visitor satisfaction rightly highlights the importance of training but fails to recognise the need for more research to identify the factors that lead to customer satisfaction, a subject which is still not well researched.

The section on improving attractions' management skills recommended more coordination of training and continuing professional development. It also reported the welcome news that the English Tourism Council is conducting an audit of the difficulties faced by attraction managers in this field. The author hopes that greater use will be made, in future, of open — and distance — learning materials, the Internet and CD-ROMs to provide skills development training for attraction managers and staff.

Benchmarking was seen in the report as a key mechanism for improving the performance of attractions. However, it noted that there are currently four separate benchmarking schemes in the attractions sector. The report recommends cooperation and harmonisation between these schemes, but perhaps one could argue that we should not have set up four schemes in the first place. This issue reflects a larger problem in the attractions field, which is the fragmentation of the supply side. The 'Action for Attractions' report¹ itself lists 14 professional bodies in the attractions field, together with four national training organisations which all have an interest in the attractions sector. This means that the attractions business does not speak with one voice and is less powerful as a result.

The report supports a new experimental initiative being taken by one of England's regional tourist boards, the 'Visitor Attractions Quality Assurance Service'. But it is surprising that, after all the emphasis on quality assurance in other industries in recent years, only now is a scheme being developed for attractions.

There is a welcome recognition of the need to change the way in which grant aid for attraction development is allocated. Two wise

The need for more coordination of training and continuing professional development

The fragmentation of the attractions industry

suggestions made in the report are to focus on upgrading existing attractions rather than developing new ones, and to ensure that more realistic assessments are conducted on potential visitor numbers and income projections.

However, the author would have liked to have seen the report tackling the issue of subsidising the revenue costs of certain attractions, which was considered earlier under the heading of ‘unfair competition’.

Finally, three other useful recommendations are made, namely:

- ensuring that the tax system encourages reinvestment in existing attractions
- developing a supportive, simplified planning framework for the development of new attractions
- creating a cross-sectoral attractions advisory group.

Overall, the report is a good attempt to come to grips with the challenges facing attraction managers in England specifically, and the UK in general. However, it is rather modest in its ambitions at a time when the attractions business faces major domestic and international challenges.

THE INTERNATIONAL DIMENSION

UK attraction managers cannot afford to focus their attention only on their own country. There are a number of international issues which will influence the UK attractions market in the future (Figure 5).

In the international tourism market, the growth of attractions in other countries is clearly increasing competition for the UK when it comes to attracting foreign tourists. The opening of a new art museum in Paris, for example, might just persuade an American tourist to visit that city rather than London. This form of competition has grown rapidly in Europe, with many new, successful, attractions being developed on the continent.

Competition from attractions in other countries

Figure 5: The international dimension of attraction management in the UK

Learning lessons from other countries

UK attraction managers and tourism policy makers can also learn lessons from good practice in other countries, including:

- the successful use of attractions to stimulate regional development, such as Futuroscope in western France
- the way in which new art museums can really help regenerate a city's image and economy, such as the Guggenheim Museum in Bilbao, Spain
- the success of American museums in attracting commercial sponsorship and private sector cooperation, with projects such as the proposed Guggenheim Museum rooms in the Hotel Casino in Las Vegas
- the branding and merchandising skills of American attractions.

Globalisation and UK attractions

At the same time, UK attractions need to be conscious of the globalisation which is taking place in the attractions industry. While this is unlikely to affect many medium-sized and smaller attractions, it will lead to the rise of mega attractions, owned by a few organisations, that will dominate the market. Most of these organisations will be American in the first instance, but this could change in the future with European and Asian companies growing in importance. These organisations, with their large budgets and marketing resources, will be powerful competitors in the UK marketplace, through their ownership of existing attractions and their development of new ones.

The need to target new, growing international markets

Finally, just as the supply side is being globalised, so too is the demand side. New markets are growing up which will be of increasing significance to UK attractions. These include Spain, Italy and Greece in Western Europe, Russia, India, China, and South American countries such as Brazil. These tourists will need to be targeted and products developed which reflect their tastes and preferences.

Thus it can be seen that developments in the wider world will have a significant impact on the management of attractions within the UK in the future.

CONCLUSIONS AND THE FUTURE

It is clear that the UK attractions sector faces great challenges that must be tackled for the sake of the future success of UK tourism as a whole.

Attraction managers need to devote more attention to:

- understanding their visitors and their motivations
- implementing the concept of segmentation, recognising that different groups of customers have different needs and desires
- exploiting the latest marketing techniques, notably the Internet and relationship marketing
- anticipating future changes in their business environment and acting proactively to pre-empt them

- learning lessons from experiences in other countries
- recognising the importance of training and education, and effective human resource management policies
- being innovative and entrepreneurial.

The need for further government action

At the same time, government policy makers need to create a climate which will allow the attractions sector to flourish, in a number of ways, notably:

- developing a more realistic approach towards public sector and National Lottery funding that prevents the development of attractions which are not viable
- reviewing approaches to the subsidising of certain attractions to ensure that these subsidies do not create 'unfair competition'
- providing greater resources for the British Tourist Authority, the English Tourism Council, and the tourist boards of Wales, Scotland and Northern Ireland to help them play a greater role in developing quality standards in the attractions sector and in the marketing of attractions
- encouraging training agencies and higher education institutions to provide tailor-made open and distance learning provision for attraction managers and staff.

The attractions 'industry' also needs to become more coordinated, with fewer professional associations, perhaps, or maybe an overarching umbrella organisation that can speak with a single powerful voice.

In many fields, for example stately homes and museums, the UK is still a world leader, but in sectors such as theme parks it appears to be falling behind. It may be that the UK now has too many attractions for the market and that a rationalisation of attractions will be seen in the years to come, as the weaker ones fall by the wayside. But whatever happens, a major effort is required to maintain the UK as a leading player in the attractions business. In this way, domestic tourism and inbound tourism in the UK will become even stronger, bringing greater benefits to the national economy.

Reference

1. English Tourism Council (2000) *Action for Attractions*, English Tourism Council, London.

Further reading

- English Tourism Council (annual) *Sightseeing in the UK*, English Tourism Council, London.
- English Tourism Council (annual) *Survey of Visits to Tourist Attractions*, English Tourism Council, London.
- Leask, A. and Yeoman, I. (Eds) (1999) *Heritage Visitor Attractions: An Operations Management Perspective*, Cassell, London.
- MacLellan, R. and Smith, R. (Eds) (1998) *Tourism in Scotland*, International Thomson Business Press, London.

- Stevens, T. (2000) 'The future of visitor attractions', *Travel and Tourism Analyst*, No. 1, pp. 61-85.
- Swarbrooke, J. (1995) *The Development and Management of Visitor Attractions*, Butterworth-Heinemann, Oxford. Second edition due to be published in late 2001.
- Yale, P. (1998) *From Tourist Attractions to Heritage Tourism*, 2nd edition, Elm, Huntingdon.