

Key Issues in Visitor Attraction Management in a Competitive Market

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Summary

The attractions market in the UK is highly competitive and with National Lottery funding stimulating the further supply of attractions, its growth has now exceeded the increase in the volume of visitors.

At the same time, the government has now begun to recognise the vital importance of the visitor attraction sector to the UK tourism industry, most recently through the 'Action for Attractions' initiative. As a result of these developments, visitor attraction managers today face a wide range of threats and opportunities and this paper examines some of them and looks at possible approaches to meeting these challenges.

Types of attractions and their dilemmas

Attractions are at the heart of the tourism industry in the UK. For both domestic visitors and international tourists, the desire to visit attractions is usually the main motivator for their trip. There are four main types of attractions, as illustrated in Figure 1.



Figure 1

For types one and two, the main aim and challenge of managers is to minimise the impact of visitors on the attraction and preferably also to minimise the number of visitors.

In the case of type four, events and festivals, the key issues depend on the nature of the event. Where it is a traditional event, the challenge is to maintain the spirit of the event while meeting visitors' needs. If it is a new event, the main aim is usually to attract visitors and maximise income.

In this paper, we will concentrate on the challenges facing the managers of the third type of attraction, man-made attractions which are purpose-built to attract tourists. Here the aim is to maximise visitor numbers and income, generally, although these attractions may also have other objectives, such as generating money that can be spent on conservation, education, or brand extension.

Figure 2 illustrates the main types of man-made attractions that are purpose-built to attract visitors.

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

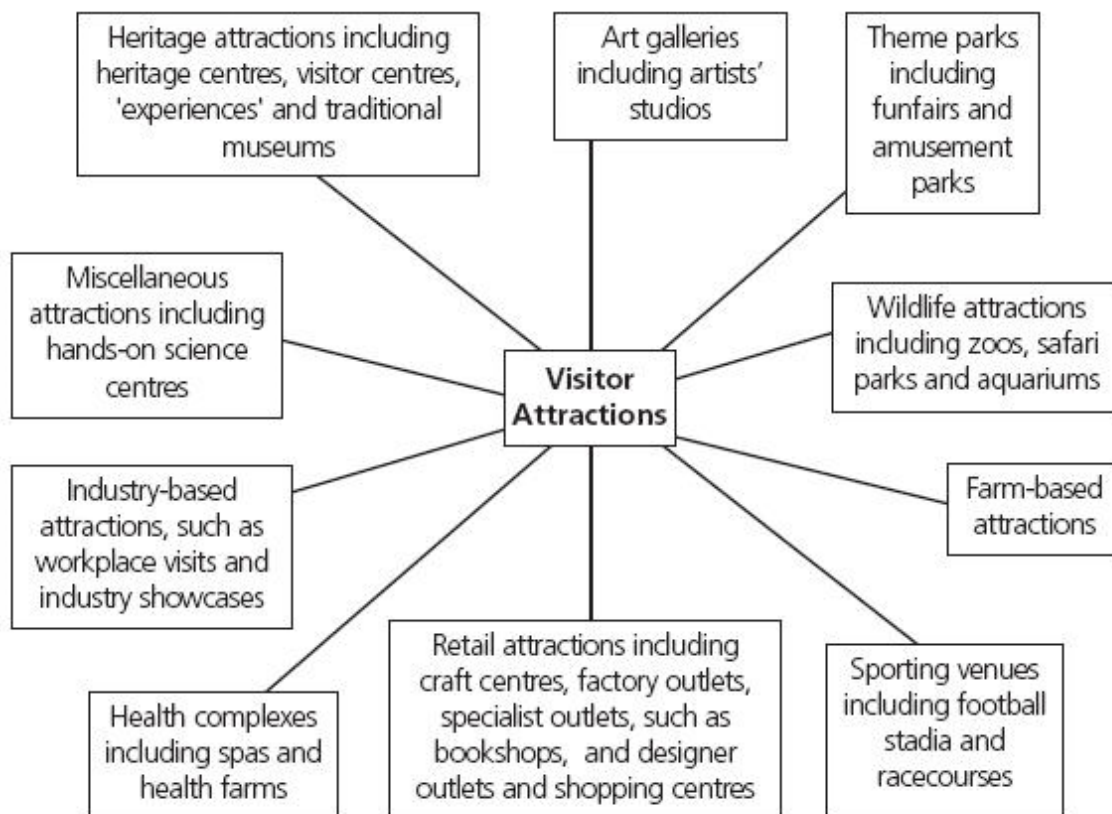


Figure 2

Attractions are an important element of the UK tourism industry, and the economy in general, because they:

- employ thousands of people, particularly women and young people, often in parts of the country with limited job opportunities;
- often act as a catalyst for the development of tourism in the surrounding area, with the further economic benefits that this brings;
- provide leisure time activities for local people;
- are often used to further public policy in urban regeneration and rural development;
- are a major reason why international tourists visit the UK;
- provide educational opportunities for school children.

However, the attractions sector in the UK has seen a number of changes in recent years, including the following:

- The supply of attractions has grown dramatically, particularly in terms of large 'mega-attractions', due to Millennium Commission funding specifically and National Lottery funding in general.
- The government has begun to take the sector seriously, through the Action for Attractions initiative in particular.
- Quality management has become a major concern, with experiments being conducted in the East of England and Hampshire.
- There has been a rapid rise in certain types of attractions, such as aquariums.
- Major attraction projects have increasingly become major media 'stories', following the Millennium Dome experience.

Key challenges for attraction managers in the UK

Let us now look at the key challenges facing attraction managers, regardless of the type of attraction.

Key challenges for attraction managers

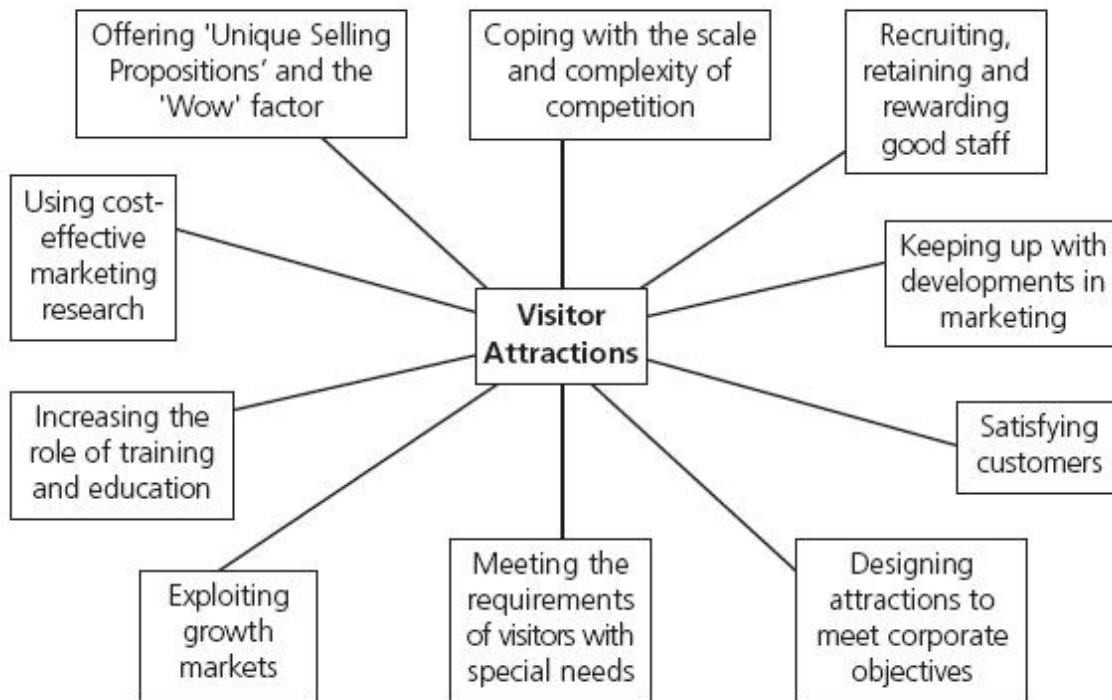


Figure 3

Coping with the scale and complexity of competition

Virtually every attraction manager the author has spoken to in the UK, and elsewhere in the world, claims that the market is much more competitive than it used to be. However, it is not only the volume of competition but also its complexity which are the main challenges.

It could be argued that all forms of leisure are potential 'competitors' for attractions:

- Home-based entertainment systems, ie computers, DVDs and CD-ROMs, are becoming a leisure attraction in their own right. They make staying at home an attractive leisure proposition.
- Retail outlets which focus on home-based leisure, such as DIY centres and garden centres.
- Active leisure pursuits, such as walking and cycling.
- Local entertainment facilities, such as cinemas and theatres.
- Attractions of a similar type within the same area.
- Attractions of other types within the area, which offer the same benefits to the same target market, whether these are entertainment or education.

This all makes the identification of competitors very difficult in the attractions sector. At the same time, there are other factors which further complicate the issue of competition in this field:

- Often, two or more attractions owned by the same organisation appear to be in direct competition with each other. For example, in several cities there is more than one museum owned by the same body, targeting similar markets, with each one struggling to attract large visitor numbers. This internal competition is a potential waste of resources.
- Many attractions feel they face unfair competition from other attractions which are subsidised, in terms of capital costs or revenue expenditure, or both. For example, the major national museums are often free because of subsidies, while small private museums have to make a charge to survive. These subsidies distort the market balance and the relationship between price paid and product quality.
- There is a growing dichotomy between small and large attractions, with the former struggling to match the growing level of professionalism of the latter.
- Foreign attractions are rarely direct competition for UK attractions. Families do not sit at home on a Sunday morning deciding whether to visit Disneyland Paris or their local museum. Foreign attractions are visited while on holiday, while UK attractions are day visits for domestic tourists. However, foreign attractions compete with the domestic ones for the international tourist markets. At the same time, when UK residents experience foreign attractions, their expectations of attractions in general increase.

Attraction managers need to recognise the complexity of competition by conducting regular competitor analysis and planning accordingly. Importantly, they should use their customers to help them identify and evaluate competitors because their perceptions could differ from that of attraction managers.

Recruiting, retaining and rewarding good staff

In the attractions sector, staff quality is an essential element in achieving success. However, in the UK, attractions have major difficulties recruiting and retaining good staff, and the management of human resources in visitor attractions is affected by a number of problems:

- Recruitment is often poorly organised and informal, with the appointment of 'friends and relatives', and/or quick decisions being taken because of the need to fill vacancies rapidly.
- The seasonal, short-term nature of employment in attractions means that they often cannot offer career prospects but just 'jobs'. This does not inspire the commitment of employees.
- Relatively little training takes place, as staff are hired just before the attraction opens for the season, and once it is opened, staff are kept very busy.
- Pay levels are often low, so the industry tends to attract younger people or those who have few other job opportunities.
- Many jobs are mundane and repetitive so staff become easily bored and disinterested in what they do, which results in a low level of customer care.
- Relatively few attractions use staff incentive schemes, such as cash bonuses or 'employee of the month' programmes, to help with staff retention.

Interestingly, in the author's experience, some of the best staff are found in:

- attractions owned by large organisations which have the resources to invest in staff training;
- small attractions with tight-knit, well-established staff teams, where owners/ managers know each of the staff personally, and vice versa;
- attractions employing a large number of volunteers; their interest and enthusiasm can make all the difference to the quality of visitor experience.

It should also be remembered that many attraction managers have no training or expertise in human resource management. It is difficult for them, therefore, to put sound staff management systems into practice.

Good staff and resulting from it a high level of customer care are competitive advantage tools, as demonstrated by Disney's example. In other words, there is a link between human resource management and marketing, and it is to this latter subject that we will now turn our attention.

Keeping up with developments in marketing

Everyone knows that marketing is vital for the success of any tourism organisation, including attractions. All the time, new marketing techniques and opportunities are coming to the fore and attractions need to take advantage of these developments, including the following:

- Using the **Internet**, imaginatively, to provide up-to-date information about the attraction and display promotional messages about it. However, the Internet should also be used for pre-booking visits to the attraction. This can encourage spontaneous decisions to visit and can reduce queues at the attraction entrance.
- Attractions need to make more use of the concept of **relationship marketing** by developing closer links with existing visitors and encouraging repeat visits with season tickets and 'Friends' schemes.
- Making more use of the concept of **market segmentation** and recognising that different groups of visitors look for different benefits when visiting attractions. The rather crude and out-dated demographic segmentation - men are like this, and older people do this - should be supplemented and gradually replaced by psychographic segmentation. It differentiates the market on the basis of criteria such as personality, eg adrenaline seekers, gregarious people, and lifestyles.
- Attractions need to learn how to handle the media in all kinds of circumstances. The Millennium Dome has clearly demonstrated the impact which the media can have on the image of attractions and the decision-making of potential visitors. Managers need to be good at:
 - planning the media campaign for the launch of a new attraction to ensure favourable coverage,
 - identifying good potential stories and feeding them to the media in ways that will maximise the chances of them being published,
 - dealing effectively with media coverage of crises, such as visitor deaths or financial problems.

There is a need for more attraction managers to be trained in media relations as this becomes an ever more important part of their job.

Marketing consortia have been used in the UK to give smaller attractions more impact in the marketplace than they could have on their own. These consortia have integrated marketing activities, such as joint brochures and advertising campaigns. These consortia are usually of two main types, namely:

- attractions in the same geographical area,
- attractions of a similar type within a region or country as a whole.

There is still scope for greater use of consortia in the attractions sector, of both types, with 'deeper' links between marketers, including joint tickets. As with hotels, these consortia could also be extended beyond marketing to include joint purchasing and shared training packages.

Satisfying customers

Dissatisfied visitors do not make repeat visits and they influence their friends and relatives, so more effort needs to be placed in customer satisfaction and this means understanding what satisfies customers. The main factors in this respect are as follows:

- Offering visitors '**value for money**' which seems to be more important than the price. For example, Europe's most expensive theme parks are also the most visited ones because visitors think they receive 'value for money'. The problem is that everyone defines 'value for money' differently. For some it is about the attraction offering unique experiences, while for others it relates to how long they spend on site. We need to learn more about what 'value for money' means to different segments.
- Visitors usually prefer to pay a **one-off inclusive price** rather than having to pay separately for various elements of a visit, particularly where there is little choice in whether to pay for them, eg car parking for those arriving by car.
- **Reliability** is very important. It is very damaging if an attraction advertises a feature, such as a new ride and

it is not in operation when the visitor is on site. This issue was highlighted, for example, in a 'Watchdog' programme on BBC1 earlier this year.

- Visitors also become dissatisfied if they feel the attraction does not deliver **what it promises** in its publicity material, even if the experience is satisfying in itself.
- Attractions need to put effort into ensuring that **support services**, such as cafés and toilets, are as good a quality as the main element of the attraction.
- Their leisure time is precious to visitors, so it is vital to **minimise queues and delays** and to provide information for visitors when they do occur.

Satisfying customers means having quality management systems where quality is perceived from a customer's point of view, rather than from that of the management. It also means conducting continuous research to monitor levels of customer satisfaction.

Designing attractions to meet corporate objectives

Design is clearly about aesthetics and some recent attraction designs have been visually stunning, such as the Millennium Dome and the Guggenheim Museum in Bilbao.

However, the design of new attractions needs to be geared to helping achieve the objectives of the attraction management, in terms of attracting more visitors, reducing costs, increasing income and maximising customer satisfaction. Design can help achieve these objectives by focusing on creating attractions which are:

- user-friendly for all types of users, whether they are families with children and with pushchairs, people with impaired sight or visitors in wheelchairs;
- designed to maximise secondary spending on catering and retailing through the location and design of the catering and retail outlets;
- ergonomically sound to reduce operating costs to a minimum;
- as environmentally friendly as possible in terms of everything from waste disposal and energy consumption to the use of recycled materials;
- capable of operating effectively and pleasing customers in all weathers, from cold, wet days to hot sunny days;
- as safe and secure as possible for both staff and visitors;
- built for multi-purpose use, so they can be used for corporate hospitality and special events, as well as for the 'normal' business of the attraction;
- designed to allow efficient throughput of visitors and to reduce queues and 'bottlenecks'.

Meeting the requirements of visitors with special needs

A great deal has been done in recent years in the UK to make attractions more accessible to disabled visitors, although more still needs to be done. For example, more attractions need to introduce:

- ramps and lifts for visitors with mobility problems,
- induction loops for customers with hearing difficulties,
- Braille signing for visitors with sight problems.

Much of the good work that has been done in the UK in terms of the needs of disabled visitors has been at European Commission-funded projects, where facilities for the disabled are a condition of funding. Large attractions have also been able to fund such improvements. However, many small and medium-size attractions have been unable to afford them. Help needs to be given to such attractions to allow them to make these improvements.

Attraction managers need to realise that not only do disabled people have a right to visit attractions like other citizens, but they are also a very large and valuable market.

Visitors with 'special needs' should not be considered synonymous with disabled ones, since many visitors have 'special needs', for example:

- visitors whose first language is not English need help to understand brochures or signs at the attraction,
- parents with very young children need baby changing and bottle warming facilities,
- visitors with special diets need suitable catering services.

It could be argued that in the era of customer-led marketing, when direct marketing allows us to target each person as an individual 'segment', each visitor should be perceived as someone with 'special needs'.

Exploiting growth markets

Attraction developers and managers need to recognise market trends and ensure that their attraction reflects them. Some of the growth markets of relevance to attractions are as follows:

- Consumer **interest in health**, both physical and mental health, in the form of stress relief. This interest incorporates exercise, diet and relaxation therapies.
- More and more people are looking for **adrenaline-raising activities**, from bungee jumping and white-water rafting to air sports.
- People are **no longer content to be spectators**, they wish to participate in a particular experience. For example, instead of just watching people make pottery, we now want to have a go ourselves at making pottery.
- A growing number of people **want to learn** something new from their leisure experiences.
- **New 'lifestyles'** are emerging all the time. We have seen the rise of the 'designer shopper' and the ' Ibiza party animal'. Attraction managers need to identify emerging 'lifestyles' and see how they can meet their needs at their attraction.
- The UK is becoming ever more **multi-cultural** and attractions need to reflect this fact in what they offer for the ethnic communities in the UK – a large potential market.
- The UK is **an ageing society** and attractions need to do more to attract older visitors.

Increasing the role of training and education

Because of the nature of the attractions sector it has been difficult to develop training and education provision that meets the requirements of this specialised sector. There is a need to develop a co-ordinated approach to training and education in this field, which is recognised in the Action for Attractions project through its strategic objectives and recommendations. The main priorities here should be as follows:

- Developing the skills of attraction managers in financial management, marketing, human resource management and strategic management;
- Extending training and education to the staff of small attractions who often miss out on training initiatives;
- Utilising technologies, such as the Internet and CD-ROM in delivering training and education;
- Running short courses at times of the year and days which are convenient for attractions staff;
- Developing 'Training the Trainers' packages to allow the benefits of training to be spread widely throughout the sectors.

The author believes that there is a need to develop deeper partnerships between the attractions sector and educational institutions. These partnerships should incorporate:

- tailor-made training courses which give credit towards formal education qualifications,
- staff exchanges,
- student placements, during which the students could assist the staff with learning market research techniques, while familiarizing themselves with the realities of working life,
- consultancy and research projects designed to help the attraction managers solve problems.

A helpful development could be the creation of one or two 'centres of excellence in visitor attraction management' at universities and colleges as it would stimulate interest in training and education in the sector.

Making greater use of cost-effective marketing research

The 'Action for Attractions' report focused attention on the need for more work to be done on measuring the attractions market in the UK. However, the author believes that there is a need to also develop other aspects of marketing research in attractions, such as:

- finding out more about how visitors decide which attraction to visit and when, together with the factors which determine visitor satisfaction at attractions;
- developing techniques to allow attractions to identify and analyse their competitors to help them see how they might gain competitive advantage over them;
- helping attraction managers to study systematically their business environment and anticipate changes that will have a significant impact on them;
- devising simple, cost-effective ways in which attractions can monitor the effectiveness of their marketing activities.

The role of marketing research has to be increased in the attractions sector as it is vital for effective marketing. Attractions need to become better at researching customer satisfaction and some of the ideas contained in the paper, *Researching Customer Satisfaction*, by Horner and Swarbrooke, in the May 2001 issue of *Insights* (Vol 12, A- 161) could be helpful in starting this process.

Offering 'Unique Selling Propositions' and the 'Wow' factor

Attraction visitors are becoming ever more experienced and sophisticated. As a result, they are always looking for something new and special. Hence, there is a need for attractions to offer 'Unique Selling Propositions' (USPs) that differentiate it from its competitors, and a 'Wow' factor - something that the visitor will remember about the attraction for years. However, both USPs and 'Wow' factors can be copied and improved by competitors, which means attraction managers always have to be looking for new USPs and 'Wow' factors, although this has a considerable cost.

Key issues for particular types of attractions

There are also some issues which are specific to particular sectors of the attractions business, some of which are identified below:

Heritage attractions

- making use of the latest technologies for interpretation but ensuring that the medium does not become more important than the message,
- incorporating recent history and the changing nature of society in the UK, such as the growth of ethnic communities,
- involving the community whose story is being told by the heritage attraction,
- deciding what stories should be told and how they should be told.

Theme and amusement parks

- there is growing pressure for better safety at theme and amusement parks in the light of highly-publicised accidents in recent years,
- there is a need to incorporate the latest rides, even though this is very expensive and is making it difficult for smaller theme and amusement parks to compete,
- parks have to ensure that children can learn something from their visit to the park, and this will help in attracting families and school groups.

Wildlife attractions

- wildlife attraction managers are having to come to terms with growing public concern over animals being kept in captivity for the entertainment, or even the education, of visitors,

- the opportunity to use Virtual Reality technologies to educate visitors about wildlife.

Farm-based attractions

- farm attractions in many parts of the UK are struggling to cope with the decline in rural tourism caused by the Foot and Mouth crisis,
- the attractions need to reflect growing public interest in the impact of farming on the environment, food safety and organic farming.

Health complexes

- in this fast-changing field, health spas and clubs have to incorporate the latest developments in therapies, treatments and diets.

Other attractions that are also facing a major challenge are those funded by the Millennium Commission and the National Lottery. These attractions have to prove that they are financially viable in the longer term, and that they bring benefits to their local communities, to justify the investment made in them.

The need for a single voice in the attractions sector

It is common knowledge that the tourism industry is neither taken seriously enough nor understood well enough by either society or the government. The same applies to the attractions sector.

The sector is very large and diverse but it does not have a single voice speaking for it. The English Tourism Council (formerly the English Tourist Board) has endeavoured to support representative bodies for the sector, such as the Visitor Attractions Advisory Committee (1987-1995) and The Round Table (ongoing).

However, there is still a need for a single organisation that would represent the sector in its entirety and lobby for its interests. This organisation should reflect:

- all different types of attractions,
- attractions in all parts of the UK,
- the importance of small-scale attractions,
- the ownership of attractions by the private, public and voluntary sectors.

The organisation should be an umbrella body under which the existing sectional organisations would continue to function, such as the Association of Leading Visitor Attractions, the Association of Independent Museums, the National Farm Attraction Network, and so on.

This new body should be independent, although working closely with government, and could play a role in:

- developing and implementing quality standards,
- co-ordinating training and education provision,
- marketing UK attractions abroad.

Looking to the future

The attractions sector is vital to the success of the UK tourism industry. However, attraction managers today face a wide range of challenges, opportunities and threats, that will determine the future success of the sector. Whether they end up being opportunities or threats may well depend on how managers react to them. For example, for attractions which successfully embrace new technologies - such as Virtual Reality and the Internet - these technologies are an opportunity to achieve competitive advantage.

The UK attractions sector is clearly diverse which accounts for its apparent fragmentation. There is a need for the sector to become more cohesive and speak with one voice, so it can have greater influence on the government policy-making process and resulting legislation affecting the industry.

At the same time, the developments in the attractions sector abroad are providing competitive challenges for the UK attractions sector. In recent years, major new attractions have been opened in countries as diverse as France and the USA, Spain and Japan, Australia and China. UK attraction managers can learn a lot from successful foreign practices: from design and marketing, to catering and providing for disabled visitors.

Within the UK, the government needs to take action to create a more level playing field for attraction operators. Subsidies to major national museums and huge National Lottery grants for new projects are probably 'unfair' competition for most small attractions. The opening of attractions which are not financially viable in the long term should also be prevented, as they will affect confidence in the UK attractions sector as a whole.

It appears that it is the small attractions that will find the future particularly difficult, as they lack the resources to compete directly with the larger players. The same situation exists in other sectors of tourism, such as hotels and tour operators, and indeed in industry in general. The way ahead for small attractions, as with hotels and tour operators, is the need for specialisation, differentiation, the use of the Internet for marketing, and an emphasis on personal service.

About the author

John Swarbrooke is Principal Lecturer in Tourism Management at Sheffield Hallam University. He is the author of *The Development and Management of Visitor Attractions* which is published by Butterworth-Heinemann.