Introduction

Tourist attractions are frequently described as the key components of a destination’s tourism industry. While they have received increasing attention from researchers, attractions continue to be poorly understood, with research lacking conceptual sophistication and depth (Richards, 2002). Tourist attractions serve two key functions in the tourism system: they stimulate interest in travel to a destination, and they provide visitor satisfaction (Gunn, 1994). Yet the role of tourist attractions in the post-modern world is changing. Consumer demands and competitive innovations are driving this change, which is resulting in a more multifaceted, fragmented attraction sector. Tourist attractions are proliferating in terms of form, location, scale and style. The following discussion explores our current understanding of tourist attractions and also a series of trends that will influence attractions over the next twenty years.

Understanding tourist attractions

Before proceeding with a detailed discussion about the future of attractions, it is useful to pause for a moment to consider exactly what we mean by the term ‘tourist attraction’. The term is difficult to define for two reasons. First, it is difficult to determine the number of visitors that have to travel to a
site before it can be classed as an attraction. Secondly, the purpose for visiting a site may determine whether it should be classed as an attraction (Swarbrooke, 2002). These technicalities are further complicated by the diverse and disparate nature of the attractions sector. While various definitions have been suggested, they vary in terms of their purpose, disciplinary approach, applicability and simplicity. Walsh-Heron and Stevens (1990) provide one of the most comprehensive and widely cited definitions of a tourist attraction. They suggest that an attraction is a feature in an area that is a place, venue or focus of activity that:

1. Sets out to attract visitors and is managed accordingly
2. Provides a fun and pleasurable experience and an enjoyable way for customers to spend their leisure time
3. Is developed to realize this potential
4. Is managed as an attraction, providing satisfaction to its customers
5. Provides an appropriate level of facilities and services to meet and cater to the demands, needs, and interest of its visitors
6. May or may not charge admission for entry.

Leiper’s (1990a) definition of an attraction, adapted from MacCannell (1976) and Gunn (1988a), stands apart from those of other authors by implicitly identifying an attraction as a system consisting of three elements: a tourist or human element; a nucleus or central element; and a marker or informative element. A tourist attraction system comes into existence when the three elements are connected. Richards (2002) provides empirical support for this view of tourist attractions, and observes that Leiper’s system does not adhere to the conventional view that tourists are ‘pulled’ towards attractions; rather they are ‘pushed’ by their own motives.

Figure 22.1 presents a framework of a tourist attraction. The framework incorporates the three key components of an attraction (MacCannell, 1976; Leiper, 1990a). An attraction cannot exist without a tourist with a motive to travel. Tourists gather information about an attraction using series of markers. There are three types of markers that may compel a tourist to visit an attraction in search of a satisfying experience. The first is an awareness marker that brings the attraction to the attention of the tourist – Leiper (1990a) calls this the generating marker. An example of an awareness marker may be a website or brochure about the attraction. A second type of marker is a transit marker or, more simply, a piece of information that the tourist encounters while en route to the destination – an example may be a roadside billboard. The final type of marker is located at the core resource, and is ambiguously referred to as a ‘contiguous marker’ by Leiper (1990a); however the concept can be broadened to describe markers that provide a context for understanding the attraction. They create a sense of place and help visitors to understand the attraction through interpretation. It is through the use of context markers, such as signage, brochures and interpretation, that visitors can conceptualize or derive meaning from the attraction.

The attraction itself is made up of a core resource, variously described as the sight (MacCannell, 1976), nucleus (Gunn, 1988a; Leiper, 1990a) or imagescape (Wanhill, 2003). The core resource is frequently conceptualized using a two-dimensional construct consisting of a natural–manmade dimension and a site–event dimension. The framework presented in this chapter adopts a slightly different approach, and uses a ‘natural–cultural’ dimension and a ‘temporary–permanent’
dimension. The natural–cultural dimension recognizes that attractions are not only based on tangible natural or manufactured attributes, but that cultural elements such as individuals (past and present) and customs can also be attractions. The temporary–permanent dimension implies that while some attractions are permanent, the core resource may change. Furthermore, this dimension recognizes the temporary nature of events as attractions. Figure 22.2 provides examples of core attraction resources that can be conceptualized using this construct.

In many attractions, the core resource does not exist without a range of augmented services that support visitor activities (Swarbrooke, 2002; Wanhil, 2003).
Gunn (1988a) referred to this aspect as the ‘zone of closure’. Augmented services may include basic visitor facilities such as restrooms, retail outlets, food and beverage facilities and transport infrastructure. The importance of intangible elements such as education, entertainment and excitement, and escapism has also been recognized by several authors (Wanhill, 2003). It is the desire to seek out these intangible experiences that initially motivates tourists to travel. The core resource provides a setting for activities that result in the creation of visitor experiences.

While other models of attractions imply that they need to be managed, this component is explicit in the framework presented. While it is certainly true that some natural attractions are not managed, a vast majority of attractions is maintained either directly or indirectly by managers or regulatory frameworks. Even the most pristine natural attractions (temporary or permanent) are subject to management regimes imposed by conservation or government agencies, albeit with varying levels of success. Attraction management, therefore, is aimed at ensuring that the needs of current visitors are met and that the resource core is preserved for future visitors.

The final aspect of the framework presented in this chapter is the recognition that tourists, managers and the core attraction resource are subject to external influences. It is these external influences that are ultimately responsible for the emergence of new trends in attractions.

**Major trends in tourist attractions**

Attractions change over time owing to physical deterioration and as a result of changing consumer needs (Gunn, 1988a). The following section attempts to identify and synthesize some of the key developments that have the potential to impact

<table>
<thead>
<tr>
<th>Permanent</th>
<th>Cultural</th>
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<tbody>
<tr>
<td>Archaeological site</td>
<td>Festival</td>
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<tr>
<td>Historic/museum site</td>
<td>Museum/art exhibit</td>
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<tr>
<td>Art gallery</td>
<td>Theatre performance</td>
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<tr>
<td>Theme park</td>
<td>Musical recital</td>
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<tr>
<td>Garden</td>
<td>Religious event</td>
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<tr>
<td>Shopping centre</td>
<td>Sports event</td>
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<td>City centre</td>
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<thead>
<tr>
<th>Temporary</th>
<th>Natural</th>
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<tbody>
<tr>
<td>National Park</td>
<td>Volcanic eruption</td>
</tr>
<tr>
<td>Landscape</td>
<td>Coral spawning</td>
</tr>
<tr>
<td>Fauna</td>
<td>Wildlife migration</td>
</tr>
<tr>
<td>Flora</td>
<td>Astronomical event</td>
</tr>
<tr>
<td></td>
<td>Meteorological event</td>
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</tbody>
</table>

**Figure 22.2** Conceptualizing the core resource of tourist attractions
on tourist attractions. The discussion focuses first on the broad ‘external’ influences that are generally beyond an organization’s influence. These trends are presented using the STEEP framework (Socio-cultural trends, Technological trends, Economic trends, Environmental trends and Political trends). Following this, the discussion turns to a consideration of trends that are ‘internal’ to the attractions sector.

**Socio-cultural trends**

Of all the forces that will change the world over the next generation, demography is arguably the most important. Some of the most pervasive socio-cultural trends influencing tourist attractions include:

- the decline of traditional families and the increasing influence of females and children in making leisure decisions
- the ageing of populations in key generating markets
- increasing cultural diversity
- multiculturalism emerging from globalization
- continued growth in more frequent, shorter trips
- the increasing sophistication of visitors seeking quality experiences in education, entertainment, excitement and escape
- disenchantment with lifestyles that focus on work and material possessions, and growing demand for experiences that incorporate spiritual elements, personal fulfilment and time to appreciate family.

These trends are caused by the complex interaction of a number of social factors, and will result in a number of challenges for tourist attraction operators. Lack of children, or an increase in the average age of women at childbirth, means that young couples have more discretionary time and income. Singles and couples may view travel as an opportunity to meet and interact with people. Smaller family size means that the family unit has greater flexibility in their activities, and more money to spend on recreation and entertainment. Tourist attractions may need to re-evaluate the types of services and packages that are offered. For example, the standard two adult-two children ‘family’ ticket may no longer be attractive to the market place. Furthermore, these trends may create a demand for activities that are less family oriented, or leisure products that provide child-minding services.

The effects of an ageing population on tourism have been extensively studied, and some commentators have suggested, rather naively, that with above average wealth and relatively few demands on their time, the elderly will make up an ever-larger part of the tourist market. These views, however, seem to ignore the reality that retired travellers will need to survive in a world of inflation, increased living costs, diminished government support and increased life expectancy. In other words, older travellers will get less for their money and will need to spread their savings over a much longer twilight period than past generations. Furthermore, some governments are contemplating an increase in the official retirement age, somewhat diluting the view that the retired market will have a great deal of disposable time. Chapter 4 in this volume explores this social development more fully.

A well-established tradition of accepting immigrants and assimilating them into a broader mainstream culture in English-speaking nations such as the
United States, Canada and Australia has caused populations in these countries to become more culturally diverse. Increased cultural diversity creates several challenges for attraction operators. First, the influx of new cultures may gradually change domestic visitor markets, in terms of both visitor preferences and expectations. Secondly, a multicultural society encourages international visiting friends and relatives (VFR) travel, and it would be reasonable to suggest that the mix of VFR travellers to a particular destination may change. A third challenge for tourist attractions is the need to be sensitive to cultural differences. For example, should tourist attractions remove pork from food menus, or should prayer rooms be provided in theme parks to meet the needs of Muslim travellers?

Technological trends

The pervasive nature of technology impacts on the business environment of tourist attractions both directly and indirectly. The direct applications of technological advances benefit the attraction sector in terms of business efficiency, product development and marketing. Technological innovations and directions of research over the next twenty years can be envisaged with reasonable accuracy because many prototypes and technologies already exist in the laboratory. Some of the technological developments that may impact on tourist attractions include:

- the use of computerized booking systems, smart cards, and electronic security to control visitor flows and to free up staff to interact with visitors
- the creation of interactive multimedia experiences using technologies such as audio, lighting, animatronics, simulations and virtual reality
- advances in online technologies such as real-time video, virtual tours and web-based interpretation to encourage visitation and remote visitor interaction
- the use of online technologies that support spontaneous travel decisions by allowing visitors to book at the last minute, perhaps at a discounted price
- the use of virtual reality and technology to enable reconstructions of cultural heritage attractions
- advances in genetics that raise the possibility of enhancing tourist attractions by ensuring that plant and animal species are more resilient, or by ‘resurrecting’ recently extinct species to create new attractions.

The way in which tourist attraction visitors will respond to the use of technology is a serious challenge for attraction operators. Sheldon (1997) suggested two polar responses to technology, using a high-tech/high-touch paradigm. She proposed that some travellers, grouped under high-tech, would have an expectation of higher levels of automation. Conversely, high-touch travellers would view technology as being destructive to the tourism experience. In reality, anecdotal evidence suggests that most travellers fall somewhere between these extremes.

Economic trends

There are perhaps as many opinions about the future of the world economy as there are commentators; however, a few consistent viewpoints are worth exploring
New Industry

here. Economic trends that may create new challenges and opportunities for attractions include:

■ the continued spread of globalization, creating a need for attractions to be globally competitive while maintaining a local flavour
■ changes in the spending of discretionary income on various leisure products, including in-home entertainment (e.g. increased spending on home theatre systems, game consoles, computers), shopping and broader leisure opportunities (e.g. cinema attendance)
■ an increased tendency for tourism businesses to focus on yield, rather than visitor numbers
■ the emergence of an increasingly wealthy middle class, with the means to travel, in countries such as China and India.

While tourist ‘production’ is linked to local conditions, tourist attractions cannot avoid being influenced by globalization. Some tourist attraction operators will need to confront the issue of globalization, as they struggle to remain competitive in the global environment while delivering authentic, personal visitor experiences.

From a micro-economic perspective, there is an increasing recognition that growth in visitor numbers is an inadequate measure of tourism performance. In Australia, some attraction operators have shifted their focus towards promoting business strategies that optimize the yield potential of different market segments. For the attraction sector, this would suggest a focus on increasing the profit earned from each visitor. This could be accomplished in a number of ways, as follows:

1. Increasing entry prices – a decision that may result in decreased visitor numbers. Decreased visitor numbers in some attractions may lead to lower operating costs, thus increasing the yield per visitor.
2. Creating a number of complementary sources of income from visitors. Examples include admissions, refreshments, souvenirs and merchandise, photos/videos of visitor experiences, and so forth.
3. Implementing marketing strategies to target wealthier clientele.
4. Using technologies to reduce operating costs – examples include the use of energy and waste minimization technologies in attractions.

Environmental trends

The combined growth of the human population and increased energy consumption has created pressures on remaining natural environments. While this has triggered a number of responses from groups with varied interests and goals, most commentators agree that the awareness of environmental impacts has increased over the last 20–30 years. This has resulted in two related trends of relevance to tourist attractions:

1. Greater pressure on attractions to deliver products and services in an environmentally responsible and culturally sensitive manner
2. An increased desire to visit attractions that conduct their business in an environmentally-friendly manner, or attractions that have a strong environmental theme.
The shift toward sustainable experiences has created a positive outcome for nature-based attractions. However, as concern for environmental issues continues to grow, demands for even greater environmental controls are inevitable – especially in relatively pristine regions or at sensitive cultural sites. This creates a challenge for tourist attraction operators, who will need to manage the constraints imposed on businesses due to environmental concerns. Some attractions have developed strategies to minimize water and energy consumption; others have responded by offering activities that alleviate environmental impacts by serving as a substitute for actual visits to sensitive sites.

**Political trends**

Perhaps the most challenging issue confronting attractions in the present political climate is the need to offer visitors a safe and predictable environment. The threat of terrorism is particularly acute for attractions such as national monuments or those that offer a setting where large numbers of people gather. Furthermore, attractions such as theme parks, which flaunt Western values and excesses, may also be terrorist targets. In the broader context, some tourist attractions are highly sensitive to the international movement of visitors and are therefore vulnerable to developments in international politics.

**Internal attraction sector trends**

An important attraction trend in both the United Kingdom and the United States is the emergence of integrated leisure complexes. These centres combine retail, leisure, entertainment, catering and accommodation into integrated complexes designed to have broad market appeal (Middleton, 2001). Global examples include Bluewater Park and Trafford Park in the United Kingdom, and West Edmonton Mall in Canada (Case study 22.1). Allied with this concept, albeit on a larger scale, is the emergence of ‘Fantasy Cities’, or Urban Entertainment Destinations (UEDs). Faced with the decline of urban centres, a number of cities have transformed central business precincts into settings that offer shopping, dining, entertainment, education and culture in a predictable and secure environment (Hannigan, 1999). Examples include Las Vegas and Times Square in the USA, and Darling Harbour in Sydney. UEDs have six common features (Hannigan, 1999):

1. They are developed around themes, usually drawn from sport, history, or popular entertainment
2. They are usually aggressively marketed, often with the help of large corporate sponsors (e.g. Nike and Coca-Cola)
3. They operate day and night
4. They offer an array of standard entertainment ‘modules’, such as themed restaurants, multiplex cinemas, high tech amusements and megastores
5. They are physically, socially and economically isolated from the local urban environment
6. They offer a postmodern environment constructed around technologies of simulation, virtual reality and the thrill of the spectacle.
Such trends place traditional tourist attractions in competition with specialist leisure and entertainment destinations. Both Middleton (2001) and Stevens (2003) have commented on the decline in visitors to traditional attractions. This decline has been attributed to intense competition from a wide range of rapidly emerging, innovative leisure products. The decline in visitor numbers, combined with decreasing public capital and revenue funding, has encouraged some tourist attractions to expand their revenue streams into areas such as conference venues, events and off-site activities.

Innovative attraction strategies

In order to compete, operators in North America, Europe, Japan and Australia have developed increasingly innovative attraction strategies. These attractions have moved away from the traditional stand-alone attractions toward multifaceted facilities offering a dense spectrum of recreational opportunities. Specific trends that can be identified from these attractions include:

1. Use of theming. Built attractions are making use of extensive theming and technology to enliven visitor experiences. Disney has long been a leader in this field, but other attractions are successfully developing themes based around nature, culture, history, fantasy, industry, agriculture and sport. These themes are often supported by high-tech rides, interactive displays and a diverse mix of recreational opportunities. Table 22.1 indicates the long-term growth of this style of attraction in the United States.

2. Managing visitor satisfaction and entertainment. There is increasing emphasis on visitor satisfaction and entertainment in heritage attractions. This trend is driven by live theatre, living history and frequently changing programmes and exhibits. Historic theme parks, such as Sovereign Hill in Australia (see Case study 22.2), exemplify this trend.

Case study 22.1 West Edmonton Mall, Canada

West Edmonton Mall exemplifies the integrated leisure complexes described in this chapter. The facility is a 49-hectare (121 acres) super mall that includes 800 stores, 110 restaurants, an ice arena, a water and amusement park, an aviary and aquarium, a dolphin lagoon and a hotel with 354 rooms. The centre is the only place in the world where visitors can experience indoor bungee jumping. West Edmonton Mall also boasts the world’s largest car park (holding over 20,000 cars), indoor lake, indoor wave pool (2 hectares) and indoor amusement park (37,000 square metres). In addition to providing a secure environment for visitors to engage in a wide variety of activities, the organization has shown a strong commitment to the environment by utilizing technologies which reduce energy and water wastage. The success of the mall is based around the concept of providing an environment that offers a compelling mix of retail, leisure, entertainment, catering and accommodation.

(http://www.westedmall.com/)
3. Providing interpretation and education. A proliferation of interpretive signage, guided tours and interpretive centres is increasingly common, particularly at natural attractions. The use of roving staff to provide explanations of exhibits or settings is an innovative illustration of this trend (Pearce, 1998).

4. Managing people and capacity. Technology is being used in high-density visitor attractions to facilitate visitor flows, to enhance visitor comfort and to reduce resource stress (Pearce, 1998). Disney’s FastPass system is an example of this trend.

<table>
<thead>
<tr>
<th>Year</th>
<th>Attendance (millions)</th>
<th>Revenue (US$billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>322</td>
<td>10.3</td>
</tr>
<tr>
<td>2002</td>
<td>324</td>
<td>9.9</td>
</tr>
<tr>
<td>2001</td>
<td>319</td>
<td>9.6</td>
</tr>
<tr>
<td>2000</td>
<td>317</td>
<td>9.6</td>
</tr>
<tr>
<td>1999</td>
<td>309</td>
<td>9.1</td>
</tr>
<tr>
<td>1998</td>
<td>300</td>
<td>8.7</td>
</tr>
<tr>
<td>1997</td>
<td>300</td>
<td>8.4</td>
</tr>
<tr>
<td>1996</td>
<td>290</td>
<td>7.9</td>
</tr>
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<td>267</td>
<td>7.0</td>
</tr>
<tr>
<td>1993</td>
<td>275</td>
<td>6.8</td>
</tr>
</tbody>
</table>

Source: International Association of Amusement Parks and Attractions, 2003

Case study 22.2  Sovereign Hill, Australia

Sovereign Hill is a multi-faceted visitor attraction that depicts the Australian town of Ballarat ten years after the discovery of gold in 1851. The attraction offers an excellent example of a ‘living’ museum presenting the mining and social history of Australia’s gold-rush era. Visitors are presented with a living gold-rush town spread over 25 hectares (60 acres) of land. The township consists of over 60 buildings that are brought to life by more than 300 costumed staff, 200 costumed volunteers and around 40 horses. The museum enhances visitor experiences through role-playing and personal interaction with characters, buildings and artefacts. This is supplemented by a modern orientation centre that utilizes audio and video to acquaint visitors with a background of the 1850s gold rushes.

After-hours use of the site is enhanced by a 90-minute ‘Blood on the Southern Cross’ sound-and-light show, which features state-of-the-art lighting and dazzling special effects. Furthermore, the museum has extended its core product by hosting small to medium conferences and meetings, as well as large group functions and special occasions such as weddings. The facility also offers on-site accommodation through the Sovereign Hill Lodge.

(http://www.sovereignhill.com.au/)
5. Enhancing professionalism. Leading tourist attractions are becoming increasingly sophisticated in their management of visitors, markets, service and presentation (Swarbrooke, 2002). One clear indication of this trend is the increasing sophistication of attraction marketing campaigns and concerted efforts to encourage repeat visitation through membership programmes and discounts for local residents. The market-niche orientation of some attractions also exemplifies an increasingly professional approach to the marketplace (Pearce, 1998).

6. Creating multiple use facilities. There is increasing recognition by attraction managers that the core resource can be exploited or further developed for multiple uses. Attractions are increasingly being used for film sets, weddings, festivals and other special events (Pearce, 1998). Some attractions have added accommodation and conference facilities to increase the utility of the resource. In addition, attractions are extending their opening hours, or have developed all-weather facilities that expand the use of the resource. Some attractions are open 24 hours a day. Singapore Zoo has been particularly successful with the development of night-time safaris.

7. Cooperative alliances. A broader economic trend stemming from globalization has been the merging and blending of companies with similar markets, goals or philosophies. When compared with the hospitality and transport sectors, tourist attractions have undergone very little corporatization. In the short to medium term, alliances and cooperative arrangements between attractions and other players in the tourism industry may be a more common form of collaboration. The concentration of attractions into corporate holdings or alliances would suggest a rapidly changing environment in which attractions will need to pool resources to counter their competitors. This trend may manifest itself in the clustering of attractions, or the sharing of market intelligence and marketing initiatives (Pearce, 1998). An extension of this trend is the emergence of single-entry tickets for clusters of attractions.

Conclusion

The next twenty years will see remarkable changes in the nature of the tourist attraction sector. The term ‘attractions’ will encompass a much wider array of facilities offering multifaceted leisure and entertainment opportunities. Successful attractions will require new forms of management and organizational configurations to deal with an increasingly sophisticated marketplace.