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**INOVACIJA U RAZVOJU ATRAKCIJA:
POUKE DOŽIVLJAJA**

**INNOVATION IN ATTRACTION DEVELOPMENT:
LESSONS OF EXPERIENCE**

SAŽETAK: Atrakcije za posjetitelje su vrlo raznolike i postoje beskonačne varijacije na temu koncepta proizvoda. Međutim, potonje je u trajnoj vezi s procjenom tržišnog potencijala i obratno. Dok postoji jasna potražnja za zabavnim atrakcijama, njen je uspjeh vezan uz kreativnost dizajna i njegovu privlačnost, to jest uz slikobraz (imagescape). Lokacija je također u vezi s procjenom tržišta i slikobrazom; atrakcije kulturne baštine imaju malo izbora u odnosu na lokaciju, dok umjetno stvorena zabava može biti locirana na svakom mjestu gdje se posjetiteljski potencijal može maksimalno iskoristiti. Uspješna inovacija u razvoju atrakcije jest stvoriti slikobraz koji nudi jake asocijacije, u skladu s ukusom i modom, a dovoljno je prilagodljiv da potakne posjetitelje na ponovni posjet. Poslovna okolina može značajno doprinijeti inovaciji atrakcije, bilo da se radi o projektu oživljavanja prostora u javnom sektoru, dijelu industrijskog projekta ili projektu koji je nametnulo tržište, što onda utječe na kriterij uspjeha.

KLJUČNE RIJEČI: atrakcije, inovacija, slikobraz (imagescape), poslovno okruženje

SUMMARY: The variety of visitor attractions is large and there are endless variations in terms of the product concept. However, the latter is inextricably bound up with the assessment of market potential and vice-versa. Thus, while there is a clear demand for entertainment attractions, success is related to the creativity of the design and its appeal, namely the 'imagescape'. Location is also linked to market assessment and the imagescape; heritage attractions may have little choice as to their location, whereas created entertainments have the possibility of locating where they can maximise visitor potential. Successful innovation in attraction development is about the creation of imagescapes that have strong associations, conform to taste and fashion, and are flexible enough to encourage visitors to return. The business environment has a major contribution to make in attraction innovation, depending whether it is a public sector regeneration project, an offshoot of an industrial project or market led, which in turn affects success criteria.

KEYWORDS: Attractions, Innovation, Imagescape, Business Environment

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1. UVOD

Uvriježeno je mišljenje da se svaka regija i svaki grad ponosi barem jednom atrakcijom koja doprinosi privlačnosti te destinacije. Nekoliko je načina definiranja turističke atrakcije¹, a za potrebe ove rasprave turističku atrakciju interpretirat ćemo kao žarište rekreacijske i obrazovne aktivnosti izletnika i turista, a koje oni često dijele s domaćim stanovništvom. Atrakcije su često razlog posjete destinaciji pružajući mogućnost raznih aktivnosti i doživljaja te su, što je za posjetitelja još važnije, vidljiv znak potrošnje po povratku kući. Raspon atrakcija je širok, a postoje i brojne varijacije glede koncepta proizvoda ili kreativnosti dizajna i doživljaja ponuđenih posjetitelju. Ovo se može nazvati "slikobrazom" (*imagescape*) u skladu s pojmom "stvaratelji dojmova" (*imagineers*) koji rabi Disney Corporation pri opisivanju svojih dizajnera². Kako bi se osnažio doživljaj posjetitelja na stalno promjenjivom pragu zaokupljenosti pozornosti³, a što je zapravo točka gdje se sastaju proizvodnja (objekata, aktivnosti i interpretativnog materijala) i potrošnja, moderan pristup je staviti recimo uzbuđljivu vožnju ili zbirku umjetnina u kontekst osobitog ambijenta ili okruženja te stoga rabimo riječ *slikobraz*.

Atrakcije se mogu razvrstati prema različitim i brojnim dimenzijama: vlasništvo, kapacitet, tržište ili gravitacijsko područje, te trajnost i tip. Najosnovnija klasifikacija prema vrsti je grupirati atrakcije u one koje su prirodne i one koje je čovjek sam izgradio. Prve uključuju krajobraz, klimu, vege-

1. INTRODUCTION

It would be fair to say that every region and every town boasts of at least one visitor attraction, which adds to their appeal as destinations. There are several ways of defining a visitor attraction¹, but for the purposes of this discussion a visitor attraction will be interpreted as a focus for recreational and, in part, educational activity undertaken by both day and stay visitors that is frequently shared with the domestic resident population. They are often the reason for visiting a destination and provide activities and experiences, and, importantly for the visitor when he/she returns home, the visible signs of consumption. Thus, the range of visitor attractions is extensive and there are numerous variations in respect of the product concept or creativity of the design and the experience proffered to the visitor. This may be termed the 'imagescape' to match the use of the word 'imagineers' by the Disney Corporation when describing its designers². The explanation here is that in order to enhance the visitor experience in an ever changing threshold of engagement³, this being the meeting point between production (of objects, activities and interpretive material) and consumption, the modern approach is to place, say, a thrill ride or a collection of artefacts within the context of a particular setting or environment, hence the word 'imagescape'.

It is feasible to classify attractions along a number of different dimensions: ownership, capacity, market or catchment area, permanency and type. The most basic

¹ Leask, A. (2008). The nature and role of visitor attractions. In A Fyall, B. Garrod, A. Leask and S. Wanhill (Eds.). *Managing Visitor Attractions: New Directions*. 2nd edition, Oxford: Butterworth-Heinemann, 3-15.

² Kirsner, S. (1988). Hack the magic: the exclusive underground tour of Disney World. *Wired*, March, 162-8 & 186-9.

³ Voase, R. (2008). Rediscovering the imagination: meeting the needs of the 'new' visitor. In A Fyall, B. Garrod, A. Leask and S. Wanhill (Eds.). *Managing Visitor Attractions: New Directions*. 2nd edition, Oxford: Butterworth-Heinemann, 148-164.

taciju, šume i prirodu koji su utjelovljeni u prirodnim parkovima u Velikoj Britaniji, kanadskim jezerima, švicarskim planinama, španjolskoj obali ili rezervatima divljih životinja u Africi. Potonji su uglavnom proizvodi povijesnog razvoja zemalja i civilizacija⁴, ali uključuju i umjetno stvorene prirodne komplekse poput tematskih parkova od kojih su najpoznatiji Walt Disney-jevi parkovi nastali isprva u Kaliforniji (1955.), a potom reproducirani na Floridi, u Hong Kongu, Parizu i Tokiju.

Međutim, podjela između prirodnih resursa i atrakcija koje je napravio čovjek nije uvijek potpuno jasna. Mnoge prirodne atrakcije, poput gore spomenutih zahtijevaju znatne infrastrukturne inpute i njihovo upravljanje kako bi se koristili u turističke svrhe. Spomenuta se infrastruktura može izgraditi kako bi se zaštitila prirodna bogatstva i okoliš. U mnogim zemljama više nije moguć javni pristup mnogim šumama. Određena su posebna mjesta za automobile, kamp prikolice i kampiranje kao i staze za šetače koje su označene posebnim bojama. Atrakcije koje su povijesna i kulturna baština kao i prirodna bogatstva ne mogu se reproducirati bez znatnih troškova i promjena autentičnosti kao što je slučaj s atrakcijama koje su primarno zamišljene kao zabava. Stoga zahtijevaju veću zaštitu i gospodarenje kako bi se smanjila njihova pretjerana uporaba. Atrakcije izgrađene ljudskom rukom obično su pod kontrolom države.

2. ATRAKCIJSKI PROIZVOD

Već prihvaćena teza u "post-fordovskom" društvu tvrdi da zbog zadržavanja tržišne pozicije proizvođači više ne prodaju proizvode s uslugama nego usluge s proizvodima, tako da svaki potrošač dobije paket usluga napravljen po njegovoj mjeri. Slika 1 prikazuje apstraktnu konstrukciju atrakcij-

classification by type is to group attractions into those that are gifts of nature and those, which are man-made. The former include the landscape, climate, vegetation, forests and wildlife, embodied in country parks in Britain, lakes in Canada, mountains in Switzerland, the coast in Spain or game reserves in Africa. The latter are principally the products of the historical development of countries and civilizations⁴, but also include artificially created entertainment complexes such as theme parks, of which the most well known are the Walt Disney parks, originating in California (1955), but now reproduced in Florida, Hong Kong, Paris and Tokyo.

However, the division between natural resources and man-made attractions is not always clear-cut. Many natural attractions, like those already mentioned above, require considerable inputs of infrastructure and management in order to use them for tourism purposes. This infrastructure may also be put in place to protect the resource from environmental damage. In numerous countries, it is no longer possible to have open public access to many forests. Specific sites are designated for cars, trailers and camping, as well as colour coded trails for walkers. Attractions that are the legacy of history and culture also share with natural resources the fact that they cannot be reproduced without considerable expense and alterations to their authenticity, unlike attractions designed principally for entertainment. They therefore deserve greater protection and management input to guard against excessive use. Such man-made attractions are commonly in the control of the state.

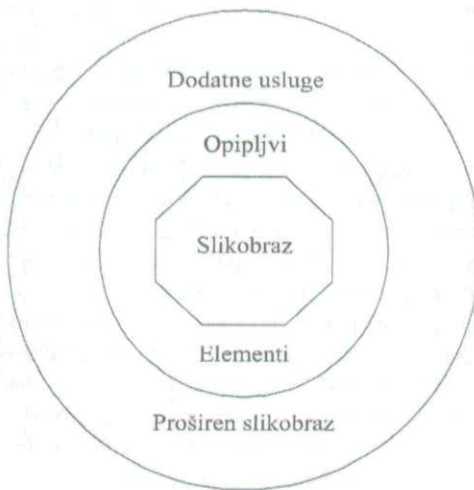
2. ATTRACTION PRODUCT

The accepted thesis in the 'post-Fordist' society is that to retain market position,

⁴ Richards, G. (1994). Cultural tourism in Europe. In C. Cooper and A. Lockwood (Eds.). *Progress in Tourism, Recreation and Hospitality Management*. Chichester: Wiley, 5, 99-115.

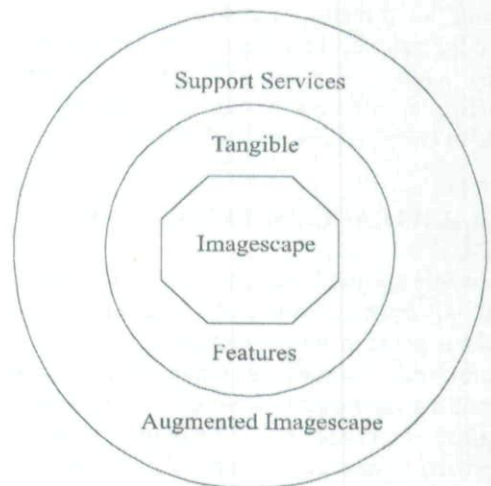
skog proizvoda čija je jezgra *Slikobraz*, a svrha prenijeti bit turističkog doživljaja potencijalnom tržištu. Ta je jezgra okružena robom i uslugama koje se kombiniraju kako bi se dodala vrijednost kroz doživljaje koji generiraju nezaboravne koristi na raspoloženje posjetitelja. Pine i Gilmore⁵, koji koriste mnoge primjere iz turizma, tvrde da pravi *slikobraz*, kroz funkcionalne aspekte tematiziranja, portretira sva četiri područja turističkog doživljaja - zabavu, učenje, estetiku i bijeg te da su potrebni kako bi se posjetitelja kao potrošača vezalo uz proizvod. Jedino tako otvoreni prostor postaje posebno mjesto gdje se može postaviti doživljaj, a što je utjelovljenje istinski uspješnih atrakcija, bile one tematski parkovi u privatnom vlasništvu, ili kulturna baština koja nije u vlasništvu privatnog sektora.

Slika 1 Atraksijski proizvod



suppliers should no longer sell goods with attached services but rather services with attached goods, so that each customer receives a bespoke package. Figure 1 presents an abstract construction of the attraction product where the core is the imagescape, the purpose of which is to convey the essence of the visitor experience to the potential market. The core is surrounded by commodities and services, which are combined to add value through experiences that generate memorable mood benefits for the visitor. Pine and Gilmore⁵, drawing many of their examples from the leisure sector, argue that the right imagescape portrays, through the functional aspect of theming, all four realms of the visitor experience, namely, entertainment, education, aesthetics and escapism that are necessary to engage the visitor, as consumer, with the product. Because only then does open space become a distinctive place to stage an experience, which is what is embodied in truly successful visitor attractions, be they theme parks in the private domain or heritage attractions in the non-commercial sector.

Figure 1 The Attraction Product



⁵ Pine II, B., and Gilmore, J. (1999). *The Experience Economy*. Cambridge Mass: Harvard Business School Press.

Različitost tema *slikobraza* turističkih atrakcija, kod predstavljanja jezgre atrakcije, bez sumnje je vrlo široka kao što je naznačeno u Tabeli 1. Zapravo, malo je novoga što privlači posjetitelje: osnovne atrakcije su i dalje čuda prirode, fizički svijet i ljudski pothvati uključujući, premda u manjem opsegu, i tamne teme koje se bave onime što smatramo inverzijama ponašanja, poput strašnih posljedica rata⁶, zločina i kazna⁷, te erotike. Dok široke teme naznačene u Tabeli 1 mogu globalno trajati, to nije slučaj s njihovim prezentacijama. Stoga životinje u zoološkim vrtovima ili u safari parkovima nisu više prihvatljiva stvar mnogim ljudima. Danas je zapažen pad zanimanja posjetitelja za obične postavbe zbirke, premda se neke, poput dragog kamenja i nakita, najbolje prikazuju na ovaj način. Bez obzira na intrinzičnu vrijednost povijesnih građevina i raznih zbirki, postavbe koje koriste filmove, računalne tehnologije, virtualnu stvarnost te kvalitetnu podršku sve više dobivaju na važnosti u njihovim prezentacijama. Na primjeru Rotterdama, Jansen-Verbeke i van Rekom⁸ pokazuju kako muzeji mogu biti učinkovit marketinški mehanizam urbanog turizma. Glavni motivacijski koncept je "nešto naučiti" kako bi se nečiji život obogatilo, a njegov je autor sam posjetitelj. Primijetivši to Moscardo i Ballantyne⁹ razvijaju koncept "promišljenosti", koji dopušta posjetiteljima kontrolu i involviranost u svoj posjet, te pokazuju kako se na taj način može oblikovati učinkovita interpretacija i tako poboljšati kvalitetu doživljaja. U tom smislu, povijesne postavbe su se razvile od statičnih muzeja voštanih figura do animatroničkih figura i oživljenih povijesnih portreta – unatoč č i-

When presenting the core, the diversity of imagescape themes for visitor attractions is beyond doubt extensive, as indicated in Table 1. Essentially, there is very little new in what draws visitors: the main attractions are still the wonders of the natural and physical world and the endeavours of human society, including, but to a much smaller extent, dark subjects that deal with what are considered to be behaviour inversions, such as the grim consequences of war⁶, crime and punishment⁷, and the erotic. While the broad themes indicated in Table 1 may be globally enduring, their presentation may not. Thus animals in captivity in the form of zoos or safari parks are no longer acceptable to many people. There is a decline of interest in the straightforward presentation of collections for today's visitor, though some, such as gem stones and jewellery, are best displayed in this way. Despite the intrinsic value of historic buildings and collections, staging, interpretation using films, IT and virtual reality, and good support facilities have become increasingly important. Using Rotterdam as a case study, Jansen-Verbeke and van Rekom⁸ demonstrate how museums can be an efficient marketing mechanism for urban tourism. The central motivation construct is 'learning something' as a means to enriching one's life and this is authored by the visitor. Noting this, Moscardo and Ballantyne⁹ develop the concept of 'mindfulness', i.e. allowing visitors to be in control and involved with their visit, and show how it can be used for designing effective interpretation, thus enhancing the quality of the experience. In this respect, historical tableaux have developed from static wax museums to anima-

⁶ Smith, V. (1998). War and tourism: an American ethnography. *Annals of Tourism Research*, 25(2), 202-227.

⁷ Foley, M., and Lennon, J. (1996). JFK and dark tourism: heart of darkness. *Journal of International Heritage Studies* 2(2), 195-197.

⁸ Jansen-Verbeke, M., and van Rekom, J. (1996). Scanning museum visitors: urban tourism marketing. *Annals of Tourism Research*, 23(2), 364-375.

⁹ Moscardo, G. and Ballantyne, R. (2008). Interpretation and attractions. In A Fyall, B. Garrod, A. Leask and S. Wanhill (Eds.). *Managing Visitor Attractions: New Directions*, 2nd edition, Oxford: Butterworth-Heinemann, 237-252.

njenici da izvorni Madam Tussauds još uvijek ima univerzalnu privlačnost dopuštajući jednostavno posjetiteljima da se slikaju s figurama poznatih osoba. Tako su živi muzeji, poput kolonijalnog Williamsburga u Virginiji i Beamisha u Sjevernoj Engleskoj, koristeći današnje interpretacijske i prezentacijske tehnologije kako bi stvorili prošlost, premostili granicu između tematskog parka i muzeja.

tronic figures and living history portrayals, though the original Madame Tussauds still seems to have universal appeal by simply allowing visitors to photograph themselves with the models of famous people. Hence living museums, such as Colonial Williamsburg in Virginia and Beamish in the North of England, by using the interpretation and presentation technology of today to create a time capsule of yesterday, have crossed the boundary between a theme park and a museum

Tablica 1. *Imagescapes*

Karakteristike	
Vojne parade	Industrija
Umjetnost i mediji	Raznovrsnost
Antropogeni resursi	Mitovi i fantazije
Djetinjstvo	Prirodni svijet
Civilizacije	Fizički svijet
Tamne teme	Politika
Zabava	Religija
Poznato i čuveno	Maloprodaja
Hrana i piće	Znanost i otkrića
Budućnost	Društvo i kultura
Povijest i nasljeđe	Sport
Hobiji i dokolica	Prijevoz

Table 1 *Imagescapes*

Characteristics	
Armed forces	Industry
Art & media	Miscellaneous
Built environment	Myths & fantasy
Childhood	Natural world
Civilisations	Physical world
Dark subjects	Politics
Entertainment	Religion
Famous & notorious	Retailing
Food & drink	Science & discovery
Future	Society & culture
History & heritage	Sport
Hobbies & pastimes	Transport

Stoga je prihvaćanje praga zaokupljanja pozornosti *slikobraza* uvijek određeno modom koja ima svoju vlastitu dinamiku nastalu iz duha upita i natjecateljske prirode društva kako bi se promijenilo društvene uzorke potrošnje i sustave vrijednosti. Moda postoji i potiče se u brendiranju svega što se kupuje; da tomu nije tako svijet bi bio zatrpan masom još upotrebljive robe i bilo bi malo promjena u suštini pružanja usluga. Poslovni koncept brendiranja podvrsta je nešto općenitije karakteristike atrakcija koje je identificirao MacCannell¹⁰, kao posebnu vrijednost u funkcionalnoj vezi s rastućom

Thus, at any one time, the acceptance of the threshold of engagement of the *imagescape* is determined by fashion, which has its own dynamic that is born out of the spirit of enquiry and competition within society to alter its patterns of consumption and value systems. Fashion exists and is encouraged in the branding of everything that is purchased; if it were not so the world would be cluttered with masses of still usable commodities and there would be little change in the nature of service provision. The business concept of branding is a subset of a more general feature of visitor attractions identified by MacCannell¹⁰, in

¹⁰ MacCannell, D. (1989). *The Tourist. A New Theory of the Leisure Class*. 2nd edition, New York: Schocken Books.

razinom semiotičkog odvajanja i razlikovanja jedne atrakcije od druge u tolikoj mjeri da ona za turista postaje nešto što se jednostavno mora vidjeti. Na ovom stupnju ostvaren je vrhunac procesa sakralizacije, premda, kao što Seaton¹¹ primjećuje kroz studiju bitke kod Waterlooa, sakralizacija nikada nije potpuna, budući da je i ona podložna pomodarstvu i promjenama vrijednosti kroz vrijeme, tako da više nije prikladno promatrati bojno polje uz izražavanje otvorene pristranosti.

Kao što to komercijalni operatori dobro znaju, nedostatak kontrole sadržaja kao što je slučaj s izložbama koje su napravljene uz pomoć različitih sponzora, ili propust komuniciranja *slikobraza* na pravom pragu zaokupljanja pozornosti u smislu ponude proizvoda i njegove potrošnje vodi do loših poslovnih rezultata i mogućeg zatvaranja atrakcije. U ovom smislu, nešto što se smatra prihvatljivim društvenim ukusom uravnotežuje želju za prilagođavanjem protivno modi da se bude različit i tako, dok sve atrakcije teže dostizanju elementa iznenađenja, radi općeg javnog prihvaćanja važno je da sadržaj *slikobraza* bude u skladu sa stilovima koji su karakteristični za to vrijeme. Stoga je za šire tržište bitno da se ne prijede mjera ukusa osim ako se ne radi o komercijalnoj atrakciji poput Londonskog zatvora (makabristička izložba srednjovjekovnog zločina i kazne) koja je dizajnirana kako bi šokirala i privukla određeni segment, tj. vojnersku i bizarnu publiku. To je nešto što ne bi bilo prihvatljivo za atrakcije koje su u vlasništvu javnog sektora, premda se i ovdje prag osjetljivosti mijenja. Na primjer, tijekom 1980-ih Muzej Victorije i Alberta u Londonu bio je jako kritiziran zbog korištenja marketinškog slogana "Super kafić uz koji se nalazi zgodan muzej!" kako bi se javnost stimulirala na novu procjenu muzeja, što je u današnje vrijeme prihvatljivo.

which the intrinsic value is functionally related to increasing the level of semiotic separation and differentiation of the attraction from others, to the point when it becomes a tourist 'must see'. At this stage, the apex of the sacralisation process has been reached, though, as Seaton¹¹ observes from the historical study of the Waterloo campaign, sacralisation is never complete, since it too is subject to changing fashions and values with time, so that it is no longer appropriate to look at the battlefield in strident partisan terms.

As commercial operators well know, lack of content control as in the case of exhibitions that are made up of a variety of sponsors, or failure to communicate the imagescape at the right threshold of engagement in terms of the product offer and how to consume it, will lead to under-performance and possible attraction closure. In this respect, what is perceived as 'good taste' in society balances the desire to conform against the fashion to be different and so, while all attractions aim to achieve an element of surprise, it is important for general public approval that the content of imagescapes conforms to styles that are characteristic of the time. Therefore, for the market at large, it is of consequence that the bounds of taste should not be exceeded, unless it is a commercial attraction, such as the London Dungeon (a macabre exposition of medieval crime and punishment), which is designed to shock and appeal to the niche segment that is the voyeur and the bizarre. This is something that would not normally be acceptable in attractions owned by the public sector, although even here sensitivities have been changing. For example, in the 1980s the Victoria and Albert Museum in London was heavily criticized for using the marketing strap-line: 'Ace café with a rather nice museum attached!' to stimulate a re-appraisal of the museum by the public, something that is acceptable today.

To complete the attraction product, the core imagescape in Figure 1 is supported by

¹¹ Seaton, A. (1999). War and thanatourism: Waterloo 1815-1914. *Annals of Tourism Research*, 26(1), 130-158.

Zaokružujući diskusiju o atrakcijskom proizvodu, Slika 1 pokazuje kako ključni *slikobraz* podržavaju dodatni sadržaji kao što su dućan, hrana, garderoba, prva pomoć, pristup za invalidne osobe, unutrašnji prijevoz i parkiralište, kao i pojačan *slikobraz* oblikovan tako kako bi se zadovoljili svi doživljajni zahtjevi posjetitelja. Potonje uključuje orijentaciju za posjetitelje, zabavu u redu za čekanje, rješavanje pritužbi, lutke, priredbe, parade i prezentacije.

3. INOVATIVNA EKONOMIJA ZA ATRAKCIJE

Inovativna ekonomija puno duguje Schumpeteru koji ju vidi kao sredstvo ekonomskog rasta. Zanimanje za Schumpetera^{12, 13} oživjeli su ekonomisti 1970-ih godina radi neuspjeha neoklasične ekonomske teorije da bi se uhvatili u koštac s fenomenom inovacije u vremenima tehnoloških promjena. Neoklasični model rasta smatrao je tehničku promjenu autonomnim procesom, što je razina apstrakcije koja nije u skladu s realnošću i djelovanjem politike javnog i privatnog sektora koji je usmjeren na promoviranje istraživanja.

Unutar sektora atrakcija (kao i u cijelom uslužnom sektoru) kreativna uporaba znanja i tehnologije postala je ključni izvor ekonomskog rasta i konkurentnosti. Da bi se inovacija prihvatila, ona mora nuditi neku komercijalnu prednost nad postojećom praksom i procesima. To daje poticaj nesavršenim tržištima koja uključuju tvrtke koje imaju znatnu moć i cijena je koja se mora platiti za inovativno vođenje. Ekonomija ove situacije vidljiva je na Slici 2: S_1 je krivulja ponude u konkurentskim uvjetima u kojima je inovacija dostupna svim tvrtkama u industriji, dok je S_0 krivulja ponude gdje inovaciju monopolizira tržišni lider, tako da nabavne cijene rastu jer su druge tvrtke u toj

facilities such as retailing, catering, cloak-rooms, first aid, special needs access, internal transport and car parking, as well as an augmented imagescape designed to ensure that all customer experiential requirements are met. The latter include: visitor orientation, queue entertainment, handling complaints, puppet characters, shows, parades, and presentations.

3. INNOVATION ECONOMICS FOR ATTRACTIONS

The economics of innovation owes much to the work of Schumpeter^{12,13} who saw it as the vehicle of economic growth. Interest in Schumpeter's work was revived by economists in the 1970s, owing to the failure of neoclassical economic theory to deal with the phenomenon of innovation in technological change. The neoclassical growth model considered technical change an autonomous process, which is a level of abstraction that it is at odds with reality and policy actions taken by both the private and public sector in promoting research.

Within the attraction sector (as in the service economy in general) it is the creative use of knowledge and technology that has become a key source for economic growth and competitiveness. For the innovation to be adopted it must offer some commercial advantage over existing practices and processes. This gives rise to imperfect markets involving firms that hold considerable power and is the price that must be paid for innovative leaders. The economics of this situation are demonstrated in Figure 2: S_1 is the supply curve under competitive conditions in which the innovation is available to all firms in the industry, while S_0 is the supply curve in which the innovation is monopolized by the market leader, so that the supply price rises due to other firms in the industry being less

¹² Schumpeter, J. (1934). *The Theory of Economic Development*. Cambridge Mass: Harvard University Press.

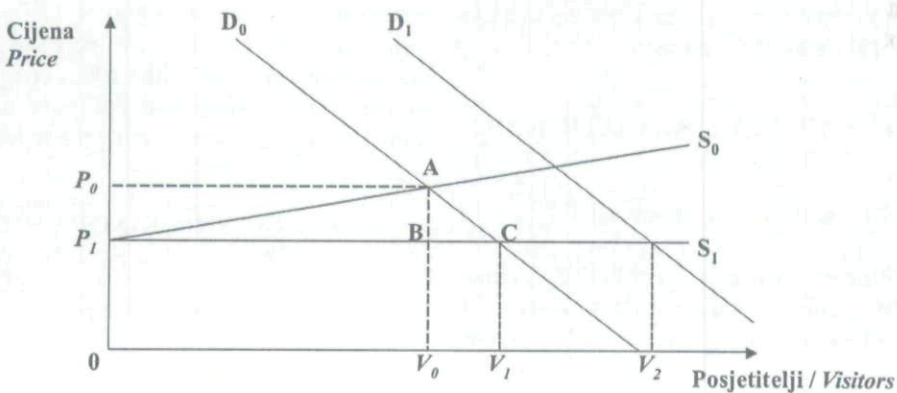
¹³ Schumpeter, J. (1952). *Capitalism, Socialism and Democracy*. 5th edition, London: George Allen and Unwin.

industriji manje učinkovite. Ravnoteža se ostvaruje na $P_0 V_0$ prema rasporedu potražnje D_0 , tako da je ABC gubitak u potrošačkom višku zbog tržišne nesavršenosti, a $P_0 AB$ je gubitak uzrokovan visokim troškovima proizvodnje, a zbog jaza između dominantne tvrtke koja je inovator najbolje i prosječne prakse. Kako proces prihvaćanja inovativnosti ide dalje, tako se krivulja nabave postepeno pomiče prema S_1 . Oni koji ranije prihvate inovaciju zarađuju na smanjenim troškovima i održavanju cijena, a tržišna snaga može im omogućiti blokiranje imitatora. Tromi su suočeni s posljedicama tržišne prilagodbe koja ih tjera na promjenu kako bi opstali. Stoga se mnoge tvrtke mogu naći u žrvnju i moraju se prilagođavati da bi održale prihode i opstale iz potrebe, a ne kako bi povećale dobit. Jednostavno govoreći, industrija atrakcija mora brzo trčati kako bi ostala na istom mjestu.

efficient. Equilibrium is established at $P_0 V_0$, against a demand schedule D_0 , so that ABC is the loss in consumers' surplus due to market imperfections and $P_0 AB$ is the loss caused by the excess production costs due to the gap between the dominant firm, which is the innovator of best practice, and average practice. As the process of adoption of the innovation proceeds, so the supply curve shifts gradually over time towards S_1 . Early adapters gain from reduced costs and maintaining prices, and market power may enable them to block imitators. Laggards face the consequences of market adjustment, which forces them to change in order to stay in business. Thus many businesses can find themselves on a treadmill and of necessity must adapt to maintain income and remain viable rather, than improve profits. Simply put, the attraction industry is required to run fast just to stay in the same place.

Slika 2. Ekonomika inovacija za atrakcije

Figure 2 Economics of Innovation for Attractions



Bit je Schumpeterove teorije da rast proizlazi iz "kreativne destrukcije" radikalne inovacije koja remeti postojeće tehnologije stvarajući tako nova tržišta. Slika 2 pokazuje kako inovacija na statičnom tržištu dovodi do smanjenja cijena do P_1 , uz limitirane promjene u proizvodnji i potrošnji V_1 .

The essence of Schumpeter's theory is that growth comes from the 'creative destruction' of radical innovation that disrupts existing technologies and creates new markets. Figure 2, indicates that innovation in a static market leads to price reductions to P_1 , with only limited changes in output and

Stoga prednosti inovacije erodiraju tržišni uvjeti koji mogu dovesti do štetnog natjecanja gdje se dominantne tvrtke natječu za tržišni udio na način da rano prihvaćaju inovacije. Kako žrvanj radi, rezultat su uglavnom pogodnosti za kupce te izbacivanje dobavljača, naročito malih tvrtki. U idealnoj situaciji kreativna veza između inovacije i tržišta, kroz prilagođavanje potrebama i očekivanjima posjetitelja, osigurava rast potražnje do D_1 što ohrabruje inovaciju i rast proizvodnje na korist svima koji su uključeni. Braun i Soskin¹⁴ ilustriraju ove aspekte tematskim parkovima u središnjoj Floridi, koje istovremeno karakterizira dominantna tvrtka Disney i krug konkurencije. Skupa Disneyjeva inovacija bila je brana ulasku drugih¹⁵, te je omogućila tržišnom lideru enormne zarade (nagrada za uspješnu inovaciju). Dalji ulazi igrača u Universal Studios i akvizicija Sea Worlda od strane Anheuser Bosch ugrozili su poziciju Disneya, što je rezultiralo konkurentnijim tržištem¹⁶ i usklađivanjem cijena prema mjestu S_1 na Slici 2. Nominalne cijene nisu pale, ali se rast cijena znatno smanjio 1990-ih u usporedbi s prethodnim desetljećem jer je promjena krenula ka ne-cjenovnom natjecanju kako bi tržište naraslo.

4. PROBLEMI INOVACIJE KOD ATRAKCIJA

4.1. Kulturna neopozivost

Primjer ilustriran na Slici 2, premda malo ograničen, pokazuje da su komercijaliziranost i izbor potrošača relativno moderni pojmovi u smislu da većina današnjih atrakcija nije nastala zbog potreba posjetitelja. Inovacijski proces je stoga gradacija si-

consumption V_j . Thus the advantage of innovation is eroded by market conditions, which can lead to ruinous competition, where dominant firms compete for market share by being early adopters. As the treadmill works its way out the result is mainly of benefit to consumers with a shake out of suppliers, particularly small businesses. Ideally the creative link between innovation and growth, through adapting to visitors needs and expectations, ensures that demand will grow to D_1 , which encourages innovation and output expansion for the benefit of all concerned. Braun and Soskin¹⁴ illustrate these aspects for theme parks in Central Florida, which at the time were characterized by a dominant firm, Disney, and a competitive fringe. Expensive innovation by Disney acted as a barrier to entry¹⁵, thus allowing the market leader to earn supranormal profits (the reward for successful innovation). Subsequent entry by a comparable player in Universal Studios and the acquisition of the Sea World parks by Anheuser Busch 'contested' Disney's position, resulting in a more competitive market place¹⁶ with price convergence towards the S_1 location in Figure 2. Nominal prices did not fall, but price increases were considerably reduced in the 1990s compared to the previous decade, as the move was to non-price competition to grow the market.

4. ATTRACTION INNOVATION ISSUES

4.1. Cultural Irreversibility

The example illustrated in Figure 2 is, however, a somewhat limited case, serves to show that commerciality and consumer

¹⁴ Braun, B., and Soskin, M. (1999). Theme park competitive strategies. *Annals of Tourism Research*, 26(3), 438-442.

¹⁵ Dixit, A. (1980). The role of investment in entry deterrence. *Economic Journal*, 90(1), 95-106.

¹⁶ Baumol, W., Panzar, J., and Willig, R. (1982). *Contestable Markets and the Theory of Industrial Structure*. San Diego: Harcourt Brace Jovanovich.

tuacije kada nismo imali prilagodbu (već ponešto kontrolirano upravljanje) do atrakcija koje su stvorene radi određene svrhe, poput zabavnih parkova, a što je vrlo različito od stereotipa radikalne promjene kako ju shvaća Schumpeterova teorija. U ovom smislu, recentnija literatura prepoznaje puno veću raznolikost u prirodi i klasifikaciji inovacija^{17,18,19} premda one nisu prijeko relevantne za mnoge nove atrakcije zbog stupnja dozvoljene prilagodbe. Ovo stoga što su promjene u nacionalnim kulturnom i baštinskom kapitalu (pod ovim se podrazumijeva vidljiva i nevidljiva imovina koja ima kulturnu i baštinsku vrijednost, bez obzira na ekonomsku vrijednost koju posjeduju) uglavnom nepovratne. Novi proizvod ili proces koji remeti postojeće kompetencije i stvara nova tržišta, urušavajući stare strukture, događa se, ali rijetko. Češće se događaju kumulativne promjene proizvoda i otvaranje tržišta, te postepeno uvođenje novih ideja i temeljite promjene u prirodi proizvodnje i tržišnog natjecanja. Tako se standardni model zabavnog parka održao 62 godine prije no što je Disney razbio stereotip u Anaheimu 1955. Disneyland je uveo pravila za razvoj/gradnju tematskih parkova koji su danas toliko poznati širom svijeta. Zaprepastivši svoje kritičare, park je u prvoj godini postojanja imao 3,8 milijuna posjetitelja; brojka koja je dosegla 13,9 milijuna do kraja milenija (danas je tek nešto ispod 15 milijuna) a područje je postalo prava turistička destinacija.

choice are rather modern notions in the sense that the majority of today's attractions have not been brought into existence for visitor purposes. The innovation process is therefore a gradation from a situation of no adaptation (but rather controlled management) to visitor attractions that are created for purpose, such as amusement parks, which is very different from the stereotype image of radical change as understood by Schumpeter's theory. In this respect, more recent literature recognizes a much greater variety in the nature and classification of innovations^{17,18,19}, although these are not necessarily relevant to many attraction developments due to the degree of adaptation permitted. This is because alterations in the nation's cultural and heritage capital stock (by which is meant tangible or intangible assets that hold cultural and heritage value, irrespective of any economic value they may possess) are, in the main, irreversible. The new product or process that disrupts exiting competencies and creates new markets, collapsing old structures, happens but rarely. It is more common to find cumulative change in the product and the opening up of new markets and the gradual implementation of new ideas, before the occurrence of fundamental changes in the nature of production and market competition. Thus the standard amusement park model lasted 62 years before Disney broke the mould at Anaheim in 1955. Disneyland set the agenda for the theme park developments that are so familiar around the world today. Confounding its critics, the park brought in 3.8 million visitors in its first year; a figure that reached 13.9 million by the millennium (now just below 15 million) as the area became a fully-fledged resort.

¹⁷ Booz, Allen and Hamilton (1982). *New product management for the 1980s*. New York: Booz, Allen and Hamilton.

¹⁸ Abernathy, W. and Clark, K. (1985). Innovation: Mapping the winds of creative destruction. *Research Policy*, 14, 3-22.

¹⁹ Hjalager, A-M. (1994). Dynamic innovation in the tourist industry. In C. Cooper and A. Lockwood (Eds.). *Progress in Tourism, Recreation and Hospitality Management*. Chichester: Wiley, 6, 197-224.

4.2. Vlasništvo

Realitet inovativnog spektra glede atrakcija održava se i u vlasničkom uzorku, kao što pokazuje Tablica 2.

4.2. Ownership

The reality of having a spectrum of innovations with regard to visitor attractions is reflected also in the pattern of ownership, as shown in Table 2.

Tablica 2. Vlasništvo

Javno	Dobrotvorne organizacije	Komercijalni sektor
Centralna vlada	Karitativne zaklade (osnovane)	Pojedinci i partnerstva
Vladine agencije	Privatni klubovi i udruge	Privatne kompanije
Lokalne vlasti		Korporacije
Državne industrije		

Table 2 Ownership

Public	Voluntary Organisations	Commercial Sector
Central government	Charitable trusts (incorporated)	Individuals and partnerships
Government agencies	Private clubs and associations	Private companies
Local authorities		Corporations
State industries		

Javni sektor uglavnom preuzima ulogu nadzornika nad onim što se smatra nacionalnim bogatstvom gdje je inovativnost ograničena, dok tvrtke iz privatnog sektora mogu biti puno inovativnije zbog potrebe za održavanjem kontakta s potrošačima te zbog svoje pozicije na tržištu. Promatrani tržišni modeli ukazuju na činjenicu da glavnina atrakcija nije u vlasništvu korporacija, što ih oslobađa od javno-dioničarskih obveza, dok mnoge pripadaju neprofitnom sektoru (javni ili dobrovoljni) te tako imaju bezbroj (često konfliktnih) ciljeva, financiranje iz mješovitih izvora i metode poslovanja generirane iz različitih ideala. Zapravo, misija drži prevagu nad financijskim rezultatom, što onemogućava precizno mjerenje i procjenu poslovnih rezultata, naročito onih financijskih. Lako je priznati kompleksnost upravljanja galerijama i muzejima zbog velikog broja i raznolikosti dionika koji čine upravu, izvršne djelatnike, djelatnike, volontere, sponzore i posjetitelje, ali to menadžerima stvara poteškoće u njihovim naporima da maksimiziraju ostvarivanje zadovoljavaju-

The public sector is more likely to take on a stewardship role of what are considered to be national assets, where innovation is constrained, while private sector firms may be much more innovative because of the need to maintain contact with consumers and their position in the marketplace. Observed ownership models indicate that most attractions are non-corporate, which absolves them of public shareholding constraints, while many are in the non-profit sector (public or voluntary) and so have a myriad of objectives (often conflicting), and mixed funding and operating methods arising from different ideals. Essentially the mission statement rather than the financial bottom line holds sway, which makes performance measures, particularly financial ones, hard to achieve and assess. It is easy to appreciate the complexities of managing museums and galleries with their range of stakeholders covering the management board, executive officers, staff, volunteers, sponsors and their visitors, which makes it difficult for managers to maximise anything

ćeg optimuma unutar granica koje određuju ciljevi za ostvarivanje misije. Nema boljeg primjera za ovaj problem od Milenijske kupole (Millenium Dome) u Greenwichu kraj Londona. Dizajniran za proslavu 2000. godine kapacitet je određen na 12 milijuna tako da su svi koji su trebali doći mogli to i učiniti. Međutim tisak je Milenijsku kupolu procijenio kao komercijalnu atrakciju, pa je broj od 6,5 milijuna posjetitelja na godinu okarakteriziran u medijima i u političkoj areni kao financijski "promašaj" te kao sramota za vladu.

4.3. "Samo Bog zna"

Ova izjava odnosi se na temeljnu nesigurnost (do određene granice) s kojom se suočavaju razvojni programi u turističkom sektoru. Prošli uspjesi nisu garancija, tako da "samo Bog zna" hoće li lansiranje nove atrakcije biti uspješno a imanentni su rizici vrlo visoki:

- *Slikobraz* se mora u potpunosti predstaviti posjetiteljima prije nego tvrtka ustanovi njihovu voljnost posjeti i plaćanju. Na primjer, Muzej kraljevske oružarnice (Royal Armouries Museum) u Leedsu koji je otvoren 1996. i planiran je posjet od 1,3 milijuna posjetitelja koji plaćaju ulaznice. Ubrzo se shvatilo da to neće biti ostvarivo. Najbolja posjećenost je bila nekih 344.000 posjetitelja u 1997. da bi pala na 158.000 u 2000. godini, i sada se ustalila na 270.000-300.000, a nakon ukidanja naplate za nacionalne muzeje koju je uvela Laburistička vlada 2001. godine;
- Teško je zaštititi inovacijski uspjeh bez znatnog ulaganja ili posebnosti;
- Nenaplaćeni troškovi obično su visoki i podrazumijevaju zanemarivo malu vrijednost spašavanja kod zatvaranja.

Ovi imanentni rizici u pravilu stvaraju defenzivnu strategiju u razvoju atrakcije, a

in these situations, as opposed to finding a satisfactory optimum within the bounds set by the objectives for achieving the mission statement. No better example of this difficulty can be found in the example of London's Millennium Dome at Greenwich. It was designed as a celebration for the year 2000 for which capacity was set at 12 million, so everyone who was likely to come could do so. However, it was adjudged by the press as a commercial attraction, so that the outturn of 6.5 million visitors for the year was declared a financial 'disaster' in the media and in the political arena, and an embarrassment to the Government.

4.3. 'Only God Knows!'

This statement refers to the fundamental uncertainty (to varying degrees) facing developments in the leisure sector. Past success is no guarantee, so 'only God knows' whether the launch of a new attraction will be successful and the inherent risks are high, as:

- The imagescape has to be presented to visitors in its entirety before the organisation learns their willingness to pay or to visit. For example, the Royal Armouries Museum in Leeds¹⁷ opened in 1996 with a design level of 1.3 million paying visitors. It was quickly realised that this would not be achieved. Its best attendance level was some 344,000 visitors in 1997, falling to 158,000 in 2000, and now settling in the range 270,000-300,000 visitors upon the abolition of charges for national museums by the Labour Government in 2001;
- It is difficult to protect innovation success without substantial investment or uniqueness;
- Sunk costs are usually high, implying negligible salvage value upon closure.

These inherent risk typically produce a defensive strategy in attraction develop-

najčešća od njih je ponavljanje uspjeha na drugom mjestu. "Meka" otvaranja prije "službenog" lansiranja koriste se kako bi se osiguralo da sve vidljive karakteristike, usluge podrške i prag zaokupljanja budu unaprijed isplanirani. Narav koncepta je također vrlo značajan, a uspjeh će se puno vjerojatnije pripisati "reproduktivnim" a ne "anticipativnim" *slikobrazima*.

Reproduktivni *slikobrazi*, koji su i najčešći, stvaranje su *slikobraza* oko već dobro prihvaćenih okolina, umjetnina, roba ili usluga, što osigurava da se vrijednost za novac lako prepozna te da se to komunicira prema tržištu. Oni znače primjenu repertoara kreativnosti na prepoznatljive (komercijalne) potrebe i mogućnosti. Posebni su, ali ne previše različiti, kako ne bi bili u neskladu s modom i onim što podrazumijeva dobar ukus, a i dovoljno su fleksibilni da ponukaju posjetitelje na ponovni posjet. Na primjer, prije projekta u Anaheimu Disneyevi likovi bili su već dobro poznati iz zabavne industrije i kao igračke. Isto je tako i francuski lik iz crtanih stripova Asterix Gal čitao na nekoliko jezika prije otvaranja Parka Asterix 1989., a i Universal Studijev atrakcijski odjel počeo je organizirati ture po svojim hollywoodskim studijima.

Anticipativni ili "avangardni" *slikobrazi*, koji pobuđuju očekivanja kroz "čistu" kreativnost, imaju veliku vjerojatnost postati ekonomsko razočaranje, kako komercijalno tako i u širem smislu privlačenja potrošnje posjetitelja na neko područje. Teško ih je procijeniti na tržištu, jer posjetitelji nemaju prethodno perceptivan doživljaj kreativnosti koja se nalazi ispred njih ni potvrdu da su prihvatljivi, s obzirom da ona može doći samo od stručnjaka. Anticipativni *slikobrazi* odvajaju kulturne od ekonomskih vrijednosti jer nema opće potvrde njihove vrijednosti. Oni riskiraju, kao u slučaju Milenijske kupole, ismijavanje poput otkrivanja "careve golotinje" ili izazivanje bijesa javnosti kada se sukobe s opće prihvaćenim sadržajem. Kod Kupole je bilo 14 zona a samo je

ment, the most common being replication of success elsewhere. 'Soft' openings prior to an 'official' launch are used to ensure that all tangible features, support services and the threshold of engagement are as anticipated. The nature of the concept is also very significant, success being more likely to be attributed to 'reproductive' rather than 'anticipatory' imagescapes.

Reproductive imagescapes, which are most frequent, are the creation of imagescapes around already well-received environments, artefacts, commodities or services, to form experiences that have strong associations with potential customers, enabling value for money to be easily recognised, and then communicating this to the market. They are the application of a repertoire of creativity to recognised (commercial) needs and opportunities. They are distinctive, but not too diverse as to be out of step with fashion and what constitutes 'good taste', and are flexible enough to encourage visitors to return. For example, the Disney characters were well known in the entertainment industry and as toys before the development at Anaheim. Similarly, the French cartoon character Asterix the Gaul was widely read in several languages before the opening of Parc Asterix in 1989, and the attraction division of Universal Studios started off with tours around their film lot in Hollywood.

Anticipatory or 'avant garde' imagescapes, which are about evoking expectations through 'pure' creativity, have a high probability of economic disappointment, both commercially and also in the wider sense of attracting visitor expenditure to an area. They are difficult to evaluate in the marketplace because visitors have no prior perceptual experience of the creativity put before them and acknowledgement, which can come from experts in the field, as to its acceptability. Anticipatory imagescapes separate cultural value from economic value because there is no recognition at large of their worth. Such imagescapes run the risk, as in the case of the Millennium Dome, of being lampooned as

jedna, transport, imala elemente koji su bili poznati javnosti, pa kada je u svibnju 1997. donesena odluka da se počne s projektom, to je prepoznato kao veliki ispit povjerenja i shvaćeno da će političke posljedice koje će iskoristiti cinični tisak biti veliki rizik. Vrlo štetni kritički osvrti projekta u tisku ozbiljno su utjecali na želju za posjetom, a pouka je bila da menadžment u ovakvim situacijama mora razviti jaku komunikaciju koja će tržištu govoriti kako treba konzimirati proizvod koji se nudi. Povijest je prepuna ovakvih primjera u jednoj generaciji koji se onda u slijedećoj pokažu kulturno vrijednima. Mnogi kulturni izvori, spomenici i umjetnički radovi koje danas određeni segmenti turističkog tržišta obožavaju nisu uvijek bili u takvoj poziciji. Tako je jedna od najomiljenijih Verdijevih opera, *La Traviata*, bila loše primljena kada je prvi put izvedena. Snažno je bilo i opiranje Eiffelovom tornju, danas ikoni Pariza, dok je Van Gogh za svog života prodao samo jednu sliku. S druge strane London Eye, kotač na obali Temze, prokušan je i testiran proizvod koji se unaprijed slavio kao veliki uspjeh.

4.4. Razvojni proces

U razmatranju različitih razvojnih perspektiva ključni aspekti koji se ovdje razmatrju su *slikobraz*, tržište i lokacija. U idealnim uvjetima ovi čimbenici slijede jedan drugoga, što onda zahtijeva odgovor na pitanje redoslijeda, tj.:

- Komercijalno: Tržište → Slikobraz → Lokacija
- Obnova: Lokacija → Slikobraz → Tržište
- Industrijsko: Lokacija → Tržište → Slikobraz

the Emperor's new clothes or causing public outrage when they run counter to what is currently accepted as appropriate content. There were 14 zones in the Dome and only one, transport, had artefacts familiar to the public, so when the decision was made to go ahead with the Dome in June 1997, it was recognised as a great leap of faith and it was realised that the political 'fallout' from a cynical press would be risky. Highly damning reviews of the project in the press severely affected the desire to visit, the lesson being that managements in these situations must develop a strong communications proposition that tells the market how to consume the product offer. History is littered with examples of this kind in one generation that are subsequently judged to have significant cultural value in another. Many cultural resources, monuments and works of art, which are now venerated by certain segments of the visitor market, were not always in this position. Thus one of the best-loved of Verdi's operas, *La Traviata*, was not that well received when it was first performed, there was fierce opposition to the Eiffel Tower, an icon of Paris, and Van Gogh only ever sold one painting in his lifetime. On the other hand the London Eye, a Ferris Wheel on the banks of the River Thames, is a tried and tested product that has been heralded as a great success.

4.4. Development Process

In order to consider different development perspectives, the key aspects that are discussed here are the Imagescape, the Market and the Location. Ideally these factors are sequential, which begs the question of the running order, namely:

- Commercial: Market → Imagescape → Location;
- Regeneration: Location → Imagescape → Market;
- Industrial: Location → Market → Imagescape.

5. KOMERCIJALNO

Poslovna logika diktira da je optimalan put Tržište → *Slikobraz* → Lokacija, ali uzimajući u obzir činjenicu da je većina atrakcijskih projekata već određena svojom prirodom i lokacijom (isto tako je i s nekomercijalnim), ovo je savršen savjet koji ima jedinu pravu snagu kada se radi o neobveznim atrakcijama koje mogu prezentirati sadržaj i to na mnoge načine, tako da se samo radi o izboru adekvatnog *slikobraza* i njegove veličine. Na primjer, "Centri života podmorja", koji su zapravo suvremeni akvariji, nisu previše sofisticirani i traže relativno malo posjetitelja kako bi bili uspješni pa ih se tako može naći na mnogim obalnim lokacijama. Suprotno tomu, na *slikobrazu* prirodnog parka potrebno je napraviti samo mali broj prilagodbi jer je lokacija zadana i ima relativno nepromjenjive immanentne elemente, tako da se promjena ograničava na dodavanje potporne infrastrukture, kao npr. centar za posjetitelje, da bi se povećao *slikobraz*. Na sličan je način muzej rudarstva, koji nudi posjetu rudniku kao dio atrakcije, vezan za lokaciju.²⁰

Najočitiji su primjer atrakcija koje slijede putanju Tržište → *Slikobraz* → Lokacija tematski parkovi i luna parkovi, jer oni traže maksimiziranje svog posjetiteljskog potencijala koji je funkcionalno vezan uz gravitacijsko područje populacije (uključujući i turiste) koje je definirano udaljenošću od maksimalno dva sata vožnje automobilom i četiri sata autobusom i vlakom. Na primjer, japanska tvrtka The Oriental Land Co.Ltd, koja je stopostotni vlasnik tokijskog Disneylanda prva je priznala da njen uspjeh u velikoj mjeri leži u lokaciji čije gravitacijsko područje broji 30 milijuna stanovnika unutar jednog sata vožnje do nje.²¹

5. COMMERCIAL

Business logic dictates that the optimum path is Market → Imagescape → Location, but given the fact that most attraction developments are already proscribed by their nature and location (and are also non-commercial), this is a counsel of perfection that only has true force in terms of footloose attractions that can present content in a broad range of ways, so that it is only a matter of choosing the appropriate imagescape and scale. For example, Sea-Life Centres, which are modern aquariums, are not too sophisticated and require relatively small numbers to succeed, and so may be found in many coastal locations. Conversely, there are limited adjustments that can be made to the imagescape of a country park because the location is fixed and it has fairly unalterable intrinsic elements, so that change is restricted to adding support facilities to augment the imagescape, such as a visitor centre. Similarly, a mining museum, that has a mine visit as part of the attraction, is tied by its location²⁰.

The most obvious examples of attractions that can follow the Market → Imagescape → Location path are theme and ride parks, because they are seeking to maximize their visitor potential, which is functionally related to the population (including tourists) catchment area within a specified drive time of up to two hours for cars and three to four hours for coach, bus or train. For example, the Japanese company, The Oriental Land Co. Ltd., which has 100% ownership of Disneyland Tokyo, is the first to acknowledge that their success is in large measure due to their location so close to Tokyo, giving a catchment area of 30 million people within one-hour's drive time²¹.

²⁰ Wanhill, S. (2000). Mines: A tourist attraction: Coal mining in industrial South Wales. *Journal of Travel Research*, 39(1), 60-69.

²¹ Jones, T. (1994). Theme parks, in Japan. In C. Cooper and A. Lockwood (Eds.). *Progress in Tourism, Recreation and Hospitality Management*. Chichester: Wiley, 6, 111-125.

Međutim, u današnjim vodećim ekonomijama dostupnost lokacija za izgradnju velikih zabavnih kompleksa često je ograničena. Stoga su i u Europi i u Sjevernoj Americi poželjne lokacije pored velikih gradova rijetke, osim ako ne postanu dostupne u projektima oživljavanja urbanih cjelina, uglavnom na lokacijama propalih industrijskih pogona. Ove su lokacije većinom pod kontrolom lokalnih vlasti ili državnih agencija koje imaju stroge odredbe o zaštiti okoliša i građevinskim dozvolama što im omogućuje diktiranje uvjeta. Stoga dostupnost lokacije može usmjeriti investitore u komercijalne atrakcije na drugi najbolji put, a to je: *Slikobraz* → Lokacija → Tržište koji može pasti pod rizik "izazivanja zanimanja tržišta pretjeranim pričanjem o projektu" kao u slučaju pariškog Disneylanda čija je lokacija ponuđena po cijenama poljoprivrednog zemljišta iz 1971. kao posljedica želje francuske vlade da uspostavi središte ekonomskog rasta u istočnom dijelu pariškog bazena²². Ono što je ovdje važno prepoznati jest da su lokacija, tržišna procjena i *slikobraz* vezani jedno za drugo, a da proces ponavljanja može postati učestalim tijekom razvojnog perioda projekta. Na primjer, kada se odabere lokacija, gradnja može početi. No što je lokacija udaljenija od optimalne tržišne pozicije to privlačniji i uzbudljiviji mora biti dizajn sadržaja kako bi se privukli posjetitelji. U suprotnom, tržišna se procjena može promijeniti što može utjecati na *slikobraz*. U svakom slučaju, studija isplativosti mora se u toj fazi mijenjati i najvjerojatnije kontinuirano tijekom vremena koje je potrebno da se *slikobraz* prevede iz ideje u praksu kako bi se održao korak s tržišnim trendovima jer je tržište pokretač uspješne komercijalne atrakcije. Kako točno uravnotežiti ove čimbenike ovisi o ciljevima atrakcije. Stoga, botanički vrt, na primjer, ima druge ciljeve od pukog maksimiziranja broja posjetitelja. Slično je i s rezervatima

However, in today's major economies, the availability of large sites for land extensive entertainment complexes is often limited. Thus both in Europe and North America, desirable sites near major cities are rare, unless they become available under an urban renewal programme, often to do with derelict industrial areas. By and large, these sites are under the control of local governments or public development agencies, with strong environmental and physical planning regulations that permit them to dictate terms. Therefore, site availability may limit commercial attraction developers to a second best pathway that runs *Imagescape* → *Location* → *Market*, which incurs the risk of 'talking up the market', as in the Disneyland Paris case where the site was offered at 1971 agricultural prices as a consequence of the French government's desire to establish an economic growth pole in the eastern part of the Paris Basin²². What is important here is to recognize that location, market assessment and *imagescape* are bound to each other and the recursive process can become iterative over the development period of the attraction. For example, once the site is selected then the development can come into place, but the further the location is away from the optimal market position, the more appealing and exciting has to be the design content to 'pull' visitors in. Alternatively, the market assessment may be changed, which in turn can affect the *imagescape*. Either way, the calculations for the feasibility study will need to be revised at this stage and most likely continuously during the time it takes to translate the *imagescape* from idea into practice in order to keep abreast of market trends, because successful commercial attractions are market driven. Precisely how these factors are balanced depends on the objectives of the attraction. Thus a botanical garden has other aims than simply maximizing visitor numbers. Similarly, wildlife sanctuaries and other

²² D' Hauteserre, A.-M. (1997). Disneyland Paris: a permanent economic growth pole in a Francilian landscape. *Progress in Tourism and Hospitality Research*, 3(1), 17-33.

divljih životinja i ostalim prirodnim atrakcijama koje ne žele poplavu posjetitelja. Ovo raspravu vraća natrag na pitanje vlasništva i ciljeva organizacije, jer jednom kada se napusti komercijalna putanja prema razvoju onda može biti teško ostvariti financijsku održivost.

5.1. Oživljavanje urbanih cjelina

Model oživljavanja urbanih cjelina i stambene izgradnje u pravilu slijedi obrnutu putanju Lokacija → *Slikobraz* → Tržište. U slučajevima gdje su stare industrijske zgrade, hale koje se više ne koriste, željezničke stanice i dokovi blizu urbanih centara često se događa da javni sektor intervenira kako na nacionalnoj tako i na međunarodnoj razini kako bi te lokacije pretvorio u turističke zone koje koriste i turistima i lokalnom stanovništvu, kao što je slučaj u Montrealu i Singapuru²³. Kako kupovina u slobodno vrijeme postaje sve važnija aktivnost i turista i lokalnog stanovništva, težište je na specijaliziranoj kupovini – kao u londonskom Covent Gardenu gdje su hoteli pomiješani s turističkim atrakcijama i poslovnim sadržajima: konferencijski centar, izložbeni prostor ili trgovinskim centrom i uredima kako bi se privuklo komercijalne ulagače. Na ovaj način turizam je zamijenio proizvodnu i distribucijsku industriju koje su napustile gradska središta u zamjenu za prostranije i jeftinije lokacije na rubovima gradova.

Kao dokaz promjenjive naravi jezgre za turističke svrhe, kao i da bi služili lokalnom stanovništvu, Pearce²⁴ navodi primjere urbanih atrakcija u Parizu; to su uglavnom crkve, robne kuće pa čak i javna kanalizacija te primjećuje da menadžeri ovih lokacija postaju sve svjesniji svojih brojnih identiteta i tu svrhu razvijaju strategije za posjetitelje. Tako je turizam prepoznat kao

natural attractions do not want to be swamped by visitors. This brings the debate back to ownership patterns and the organization's objectives, because once the commercial pathway to development is abandoned, financial viability may be difficult to attain.

5.1. Regeneration

The regeneration and property development model typically follows a reverse pathway, Location → Imagescape → Market. In such cases, where old industrial buildings, disused market halls, railway stations and docks are located close to urban centres, it is fairly widespread to find public sector intervention, both at national and international level, to convert them into tourist zones which serve both visitors and residents alike (as in Montreal and Singapore)²³. Since leisure shopping is an increasingly important visitor and resident activity, there has been a focus on specialty shopping - as in Covent Garden, London intermingled with hotels, leisure attractions and also business facilities: a convention centre, an exhibition hall or trade centre and offices in order to attract commercial developers. In this way, tourism has replaced manufacturing and distribution industries, which have left the inner core for more spacious and cheaper locations on the outskirts of the city.

As evidence of the changing nature of the core for tourism purposes as well as serving local residents, Pearce²⁴ cites examples of urban attractions in Paris, namely churches, department stores and even sewers, noting that managers of these sites have become increasingly aware of their multiple identities and have developed visitor strategies for this. Thus tourism has been recognized as a feasible economic option and catalyst for community regeneration, for example, the development of Baltimore's Inner Harbour, or

²³ Chang, T., Milne, S., Fallon, D., and Pohlmann, C. (1996). Urban heritage tourism: the global-local nexus. *Annals of Tourism Research*, 23(2), 284-305.

²⁴ Pearce, D. (1999). Tourism in Paris: studies at the microscale. *Annals of Tourism Research*, 26(1), 77-97.

izvediva ekonomska opcija i katalizator komunalnog oživljavanja poput Inner Harbour u Baltimoru, ili South Street Seaport u New Yorku, ili Albert Dock u Liverpoolu, ili Darling Harbour u Sydneyu, ili Victoria i Alfred Wharf u Cape Townu. Na ovaj način turizam može postati "ljepilo" koje objedinjuje područje, naročito tamo gdje lokalne vlasti ne mogu učiniti puno toga s imovinom, a u cilju stabilizacije ekonomskog pada podizanjem imida da bi se privukli privatni investitori. Primjer dugoročnog oživljavanja je Cap Breton Island u Kanadi.²⁵

Vlasništvo razvojnih projekata oživljavanja je mješovito i često proizlazi iz javno-privatnog partnerstva gdje su dohodovne aktivnosti često u rukama privatnog sektora. Razlog zašto javni sektor sudjeluje je u široj koristi za ekonomiju, društvo i okoliš. Čak i kod komercijalno poželjnih urbanih lokacija obično se računa s dijelom od oko 15-20 % za slobodno vrijeme u svrhu dobivanja građevinske dozvole. Međutim, graditeljski projekt za slobodno vrijeme može biti odabran s "liste želja" lokalnih vlasti na kojoj su sadržaji vezani za lokalno stanovništvo, a koji mogu biti nepogodni za turističke svrhe. S druge strane, trend kod suvremenih maloprodajnih centara je osigurati doživljaj zabave za cijelu obitelj uvođenjem tematskih zona, klubova za poboljšanje zdravlja, kina, prostora za predstave, restorana i barova uz tradicionalne sadržaje, u zatvorenom prostoru koji može raditi tijekom cijele godine. Takvi su projekti učestali u Sjevernoj Americi i Europi (npr. West Edmonton Mall u Kanadi i Mall of America u Minneapolis), a postali su i poznate atrakcije same po sebi te imaju visoku razinu povratnih posjeta koje se broje u desetinama milijuna pa se mogu nositi s brojkama u turističkim destinacijama.

S gledišta čiste atrakcije (za razliku od miješanih projekata) reverzni put strategija

South Street Seaport, New York, or the Albert Dock, Liverpool, UK or Darling Harbour, Sydney, or the Victoria and Alfred Wharf, Cape Town. In this way, tourism can become the 'glue' that holds the area together, particularly where there is little else the local authority can do with such assets, and the object is to stabilise economic 'shrinkage' by raising place image, in order to attract private investment; for example, the long term regeneration of Cape Breton Island, Canada²⁵.

Ownership of regeneration development is mixed, frequently resulting from a private/public sector partnership in which the revenue earning activities are commonly in the hands of the private sector and the rationale for public participation is vested in the wider economic, social and environmental benefits that are bestowed. Even for commercially desirable urban sites, there is usually a proportion, of around 15 to 20 per cent, devoted to leisure in order to obtain planning permission. However, the leisure development may be drawn from the local authority's 'wish list' of amenities for local residents and could be unsuitable for tourism purposes. On the other hand, the trend in modern retail malls is to provide an entertainment experience for the whole family through adding themed areas, health clubs, cinemas, performance venues, restaurants and bars to traditional shopping facilities in an enclosed space that can be open all year round. Such developments, which have become increasingly commonplace in North America and Europe (for example, West Edmonton Mall in Canada and the Mall of America in Minneapolis), have become noted visitor attractions in their own right, with high levels of repeat visitation giving attendance levels in tens of millions that match those of destinations.

From a pure attraction (as opposed to a mixed development) standpoint, the reverse

²⁵ Brown, K. and Geddes, R. (2007). Resorts, culture, and music: The Cape Breton tourism cluster. *Tourism Economics*, 13(1), 129-141.

oživljavanja može nositi određeni rizik, u smislu da može rezultirati projektom koji polazi izvana prema unutra i/ili inflacijom projekata. Prvi se koristi kako bi se objasnila investicija koja kreće od fizičke strukture prema *slikobrazu*, za razliku od suprotnih projekata koji za početnu točku uzimaju *slikobraz* da bi zatim oko njega stvorili strukturu. Potonje je slučaj kod mnogih atrakcija koje cvjetaju. Na primjer, struktura Milenijske kupole u Londonu završena je puno prije nego se znao njen sadržaj tako da je morala biti projektirana na način da ima maksimalan izložbeni prostor. Kreativnost *slikobraza* te kako se oni zajedno povezuju nije bila efikasno komunicirana publici i dozvolila je medijima da budu satirični prema projektu kao umjetnom i bez sadržaja, premda je ocjena zadovoljstva kod onih koji su posjetili Millenium Dome bila dobro iznad 80%.²⁶

Tamo gdje su javne vlasti uključene uvijek postoji opasnost od inflacije projekata kao odgovor na društveni ponos i taštinu lokalnih političara. Ovo rezultira preuveličavanjem o stvaranju novih radnih mjesta kako bi se dobila besplatna sredstva za izgradnju, povećala kompleksnost što napuhuje troškove konzultanata i značajno povisuje kapitalnu strukturu na korist arhitekata. Državna revizija u Velikoj Britaniji kritična je prema ranije spomenutom Muzeju kraljevske oružarnice, a i prema nekoliko milenijskih projekata koji su bili financirani novcem iz fonda Baštinske lutrije (Heritage Lottery), a došli su u sličnu situaciju. Neke od njih je trebalo zatvoriti kao što su, na primjer, Nacionalni Centar za popularnu glazbu (National Centre for Popular Music) u Sheffieldu, Centar za Vizualne umjetnosti (Centre for Visual Arts) u Cardiffu te Zemaljski centar (Earth Centre) pokraj Doncastera.

pathway of regeneration strategies may carry a high degree of risk, in that they can result in an 'outside-in' project and/or project inflation. The former is used to describe an investment that goes from the physical structure to the imagescape, as opposed to an 'inside-out' project that takes as its starting point the imagescape and then creates the structure around it. The latter is the case of most visitor attractions that appear to be flourishing. For example, the structure of the Millennium Dome in London was finalized long before the content was known, so it had to be designed to give maximum exhibition space. The creativity of the imagescapes, and how they linked together, were not effectively communicated to the general public and allowed the media to satirize the project as ersatz and of no substance, even though the satisfaction rating amongst those who had visited the Dome was well over 80 per cent²⁶.

Where public authorities are involved, there is always the danger of project inflation in response to civic pride and the vain glory of local politicians. This results in an exaggeration of employment creation to obtain development grants, increased complexity, which boosts consultants' fees, and substantial capital structures to the benefit of the architects. The National Audit Office in the UK is critical of the Royal Armouries Museum cited above, in this respect, and several millennium projects sponsored by the Heritage Lottery Fund in the UK have gone this way. Some have had to be closed, for example the National Centre for Popular Music in Sheffield, the Centre for the Visual Arts in Cardiff, and the Earth Centre near Doncaster.

²⁶ National Audit Office (2000). *The Millennium Dome*. London: The Stationary Office.

5.2. Industrijski

Industrijske atrakcije slijede putanju Lokacija → Tržište → *Slikobraz*. U prvom primjeru prirodna povezanost s proizvodnim mjestom diktira lokaciju, kao što je slučaj sa Svijetom Cadburyja (Cadbury World) u Bournevillu pokraj Birminghama (Velika Britanija) koji je otvoren 1990., Universal Studios Hollywood (otvoren 1964.), Spirit od Dearborn, SAD (otvoren je 1999.) ili Legoland u Billundu u Danskoj (otvoren je 1969.), jer su se gotovo svi oni razvili na kapitaliziranju potražnje potrošača i njihovom željom da posjete mjesta izvorne proizvodnje. Ovo su reproduktivni *slikobrazi* koje diktira zanimanje tržišta za proizvod i njegovu povijest te se može smatrati kao rastezanje ili širenje brenda kako bi se atrakcija povezala s proizvodom tvrtke i kako bi se razlikovao od konkurencije. Danas je za tvrtke moderno da idu tim "post-Fordovskim" putem koristeći povezanost potrošača s njihovim proizvodima da bi svoje brendove proširili na atrakcije svjesni da su imanentni rizici mali i da postoje pozitivne koristi od podržavanja brenda.

5.3. Splet Tržište-Slikobraz

Tablica 3 empirijski je prikaz kako nastaje promjena kod atrakcije, a izvučena iz autorovog doživljaja tijekom rada na njima. Obje osovine definirane su sa stanovišta ulagača u novi atrakcijski projekt, bilo da je riječ o komercijalnom ili neprofitnom sektoru, ili nekom javno privatnom partnerstvu. Projekt se smatra kao zasnivanje novog posla, nove aktivnosti u okviru postojeće atrakcije, ili preformulacija postojeće atrakcije. U zadnja dva primjera treba biti svjestan da će za ulaganje u *slikobraz* postojati više ograničenja, bilo zato da se bude u skladu s općim brendiranjem atrakcijskog proizvoda, bilo zbog ograničenosti dostupnih resursa.

5.2. Industrial

Industrial visitor attractions tend to pursue a path Location → Market → Imagescape. In the first instance, natural association with the place of production dictates the location, as for example, Cadbury World, Bourneville, near Birmingham, UK (opened in 1990), Universal Studios, Hollywood (opened in 1964), Spirit of Ford at Dearborn, USA (opened in 1999), or Legoland, Billund, Denmark (opened in 1969), as they have almost universally developed from capitalizing on the demands of consumers to visit the production site. These are reproductive imagescapes dictated by market interest in the product and its history, and may be regarded as brand stretching or brand extension, so as to associate the attraction with the merchandise of the organization and distinguish it from its competitors. It is now fashionable for companies to go down this 'post-Fordist' road of building on their customers' association with their products to stretch their brands into visitor attractions, knowing that the inherent risks are small and there are positive benefits in supporting the brand.

5.3. Market-Imagescape Mix

Table 3 is an empirical interpretation how attraction change takes place, drawn from the author's experience of working with them for funding and development purposes. Both axes are defined from the stance of a developer of a new attraction project, whether in the commercial or not-for-profit sector or in some private/public partnership. The development is taken to be the establishment of a new business, a new activity in a current attraction, or a reformulation of an existing attraction. In the last two instances, it should be appreciated that there are likely to be more limitations on the development of the imagescape, either because it has to be in keeping with the overall branding of the attraction product, or it is constrained by the nature of available resources.

**Tablica 3. Atraktivni Splet
Tržište-Slikobraz**

Slikobraz		
Tržište	Sadašnje	Novo ili buduće
Sadašnje	Atrakcije "oponašanja"	Atrakcije "velikih inspiracija"
Novo ili buduće	Atrakcije "novih verzija"	"Čudesne" atrakcije

**Table 3 The Attraction
Market-Imagescape Mix**

Imagescape		
Market	Current	New or Future
Current	"Me too" attraction	"Grand inspiration" attraction
New or Future	"New ver- sion" attrac- tion	"Wonder" attraction

Na primjer, kulturni događaji i baštinske atrakcije polučuju kako kulturne tako i ekonomske vrijednosti, ali nema a priori razloga da se ove vrijednosti kreću u istom pravcu, pa promjene u količini ili prirodi kulturnih bogatstava obično dovode do gubitka onoga što je autentično. Ovo ograničava raspon mogućnosti kreativnosti *slikobraz* što je slučaj kod tradicionalnih umjetnosti poput orkestralne muzike, baleta ili opere.²⁷ Ekonomiju klasičnih radova diktiraju davno preminuli kompozitori i današnji umjetnički direktori ne mogu tu puno promijeniti. Stoga je potrebna znatna javna potpora ako želimo da ove umjetnosti prežive u izvornom obliku. Ono što je također važno je veličina, stoga male atrakcije mogu ponuditi samo jedan *slikobraz* koji je često određen resursima, dok stvorene atrakcije poput tematskih parkova promoviraju višestruke *slikobraz*e strukturirane oko različitih vožnji i sadržaja kako bi se ostvarile potrebne stope tržišne penetracije.

For example, cultural events and heritage attractions yield both cultural as well as economic values, but there is no a priori reason for these values to move in the same direction, and changes in the stock or nature of cultural assets will usually lead to the loss of that which is authentic, as noted earlier. This restricts the scope of what is possible in the creativity of the imagescape, as in the case of the traditional performing arts such as orchestral music, ballet and opera²⁷. The economics of classical works are dictated by a long gone composer and there is little today's artistic director can do about it; hence considerable public subsidy is necessary if these art forms are to survive in their original format. What is also important is scale, thus small attractions may offer only a single imagescape, often proscribed by the resource base, while created attractions like theme parks promote multiple imagescapes structured around different rides and features in order to achieve the required market penetration rates.

²⁷ Wanhill, S. (2006). Some economics of staging festivals: The case of opera festivals. *Tourism, Culture & Communication*, 6(2), 137-149

5.4. Atrakcije oponašanja ("me too")

Ovo je najčešći atrakcijski doživljaj jer uključuje najmanje rizika i moguće je promatrati paralelne projekte (isprobane i testirane) da bi se vidjelo jesu li uspješni ili neuspješni. Trebalo bi biti moguće dobiti pouzdane podatke koji bi se kombinirali s ukupnim tržišnim trendovima da bi se vidjelo koliki je vjerojatni kapacitet tržišta. Tamo gdje se javni sektor uključuje, opasnost od koje se treba braniti je fenomen "ja također" koji koriste lokalni političari, jer u projektu koji nastaje na njihovom području vide svoju političku šansu. Ovaj primjer vidljiv je u razvoju rudarskih muzeja/centara baštine u dolinama Južnog Walesa tijekom ranih 80-ih što se dogodilo nakon zatvaranja ugljenokopa.²⁸ Brojni su projekti pokrenuti bez prethodnog istraživanja sugerirajući da će samo 7% posjetitelja vjerojatno posjetiti više od jedne od atrakcija u području. Politički projekt "ja također" se uvijek može opravdati potrebom, no drugo je pitanje je li moguće potrebu pretvoriti u potražnju po određenoj cijeni koja će učiniti projekt financijski ili ekonomski održivim. Iz perspektive šire ekonomije ovakvi projekti ne bi se trebali pokretati sve dok se ne razmotre pitanja vezana uz migraciju posjetitelja s drugih atrakcija, jer pretjerana ponuda može rezultirati serijom ekonomski neodrživih atrakcija koje u konačnici samo trate resurse. Komercijalne studije isplativosti često ne uzimaju dovoljno u obzir ovaj aspekt kada promatraju konkurenciju na tržištu ili na činjenicu da se mnoga ulaganja u atrakcije ne vrata. Inovacijski postupak na ovom stadiju uglavnom je neznan jer se temelji na sljedbeništvu, ali može s vremenom imati veći kumulativni utjecaj od serije prilagodljivih poboljšanja koja podižu broj posjetitelja i poboljšavaju njegov doživljaj. Inovativne promjene jednostavno ojačavaju dominantni dizajn i njegovu privlačnost te su u

5.4. 'Me Too' attractions

This is the most common attraction experience since this involves least risk, because it is feasible to look at parallel projects (tried and tested imagescapes) to see whether or not they are successful. It should also be possible to obtain reliable data to be combined with overall market trends to see what the market absorption capacity is likely to be. Where there is public-sector involvement, the danger to guard against is 'me tooism' on the part of local politicians who see a political opportunity arising from the location of the project in their area. An example of this can be seen in the development of coal mining museums/heritage centres in the valleys of South Wales, during the late 1980s, following the closure of the collieries²⁸. A number of developments went ahead despite survey evidence, suggesting that only about 7 per cent of visitors were likely to visit more than one mining attraction in the area. Politically, 'me too' projects can always be justified on the basis of need, but whether it is possible to turn need into demand at a price, which will make the project financially or economically viable is another question. From the perspective of the economy at large, such projects should not go ahead until questions over displacement of visitors from other attractions have been considered, since over-supply can result in a series of non-viable attractions that end up wasting resources. Commercial feasibility studies often do not take sufficient account of this aspect when looking at the competition for market share, or the irreversibility of most attraction investments. The innovation process at this stage is usually minor since it is based on followership, but it can have a cumulative impact over time from a series of adaptive improvements that raise visitor throughput and enhance the experience. Innovative changes simply strengthen the dominant design and its

²⁸ Wanhill, S. (2000). *Op.cit.*

jasnoj suprotnosti s ranije spomenutom Schumpeterovom pozicijom.

5.5. Atrakcije "Velikih inspiracija"

Ovdje je problem hoće li "velika inspiracija", u smislu *slikobraza*, funkcionirati u odnosu na tržište ili se samo radi o idejnom zanosu koji je nepotrebno i nerealno skup hir u kontekstu onoga što si tržište može priuštiti. Kako bi osujetili ovakve situacije, velike tvrtke sada imaju cijele odjele koji se bave kreativnošću i dizajnom. Ovo nije zbog toga da bi se potkopao jedinstveni genij Walta Disneya čija je osobna inspiracija 1955. dovela do stvaranja Disneylanda. Što se tiče javnog sektora, muzej imena North of England Open Air Museum u Beamishu bio je osobna inspiracija Franka Atkinsona, lokalnog kustosa, koji je projekt "tjerao" 14 godina prije nego što je otvoren 1972.²⁹

U smislu procjene, uobičajena je strategija u ovom području pokušati preokrenuti slijed evaluacije projekta procjenjujući broj posjetitelja potrebnih da projekt bude i isplativ i održiv po cijeni koju je tržište spremno platiti. Čak i kada se ova prepreka preskoči ostvarivanje projekta u ovom kvadrantu veoma ovisi o reputaciji njegovih predlagača što omogućava da se dobiju potrebna sredstva i urbanističke dozvole. Potonje je "minsko polje" u razvijenom svijetu budući da je većina važnih lokacija pod kontrolom lokalne administracije a one pak nisu poznate po otvorenosti prema novim idejama ili po razmišljanju u okviru 10-15 godišnjih trendova.

Inovacijski proces bi u ovom kvadrantu trebao zanemariti postojeći način prezentiranja *slikobraza* i stoga je u svom pristupu radikaln (prema Schumpeterovom pogledu na inovaciju kao izvođenje novih kombinacija ili načina na koji se stvari rade), ali se ipak bavi postojećim tržišnim strukturama.

appeal, in clear contrast to the Schumpeter's position stated earlier.

5.5. 'Grand Inspiration' Attractions

The difficulty here is weighing up whether the 'grand inspiration', in terms of the imagescape, will work in relation to the market or whether it is simply an enthusiastic idea, which is an indulgence that is unnecessarily or unrealistically costly in the context of what the market can afford. To counter this, major leisure firms now have whole divisions looking at creativity and design. This is not to undermine the importance of the single genius such as Walt Disney, whose personal inspiration was the creation of Disneyland in 1955. On the public sector side, the North of England Open Air Museum at Beamish was the personal inspiration of Frank Atkinson, a local museum curator, who had to 'drive' the project for 14 years before it finally opened in 1972²⁹.

In terms of assessment, a common strategy in this area is to try to reverse the project evaluation sequence by estimating the volume of visitors needed to make the project both feasible and viable at a price the market is prepared to pay. Even if this hurdle is passed, however, delivering projects in this quadrant is very much dependent on the track record of its proposers, so that it is possible to raise the necessary finance and to obtain various planning consents. The latter is a 'minefield' of issues in the developed world, as most important sites are under local authority control and local government culture is not noted for being receptive to new ideas or being able to think in 10-15-year trends.

The innovation process in this quadrant should make the existing imagescape delivery style obsolete and is therefore radical in approach (corresponding to Schumpeter's view of innovation as carrying out new

²⁹ Johnson, P. and Thomas, B. (1992). *Tourism, Museums and the Local Economy*. Cheltenham: Edward Elgar.

Iako možda može osigurati prednost pred konkurencijom i preuzeti dio tržišta od drugih, on ipak ne uništava konkurenciju koja u svakom slučaju može kopirati nove ideje.

5.6. Atrakcije "Novih verzija"

Ovdje inovativni aspekti mogu biti otvaranje novih tržišnih mogućnosti, uz zadržavanje postojeće forme i sadržaja *slikobraza*, s osvježavajućim učinkom na postojeću atrakciju budući da se trenutna publika previše vezala uz proizvod ili je tržište uznapredovalo ili zbog kombinacije jednog i drugog. Prostorna podjela tržišta može biti važna, pa tako stari koncepti mogu funkcionirati na novim destinacijama dok su novi potrebni kako bi se išlo naprijed na etabliranim destinacijama. Primjer prethodnog je postepeno seljenje Disneya na druge lokacije koje je počelo s otvaranjem Tokyo Disneylanda. Isto su tako i Universal Studios tražili povećanje globalne prisutnosti kroz razvoj tematskih parkova. Ovaj inovativni put analogan je postupcima upravljanja prinosom, a udruženja kulturne baštine mogu se koristiti ovime kupujući nove nekretnine i prilagođavajući se posjetiteljima u područjima gdje postoji manjak dvoraca, palača i plemićkih kuća koje su otvorene za javnost. Nacionalni muzeji i galerije imaju javnu dužnost izložiti svoje zbirke i mogu otvoriti podružnice u različitim dijelovima svoje zemlje. Ovakvi projekti vođeni su ponudom, jer generiraju potražnju u odnosu na lokaciju koja nije prethodno postojala i na taj način predvide tržište. Stoga postoji potreba za cjelovitim istraživanjem tržišta i prognoziranjem kako bi se u obzir uzeli kratkoročni (ekonomija, financijska klima i politička situacija) i dugoročni uvjeti (demografija, društvene vrijednosti i stil života, tehnologija, klima i okoliš). U suprotnosti s prethodnim, oživljavanje proizvoda je defanzivna strategija kako bi se zadržala postojeća posjeta koja zahtijeva pomno praćenje ključnih tržišnih trendova koji utječu na

combinations or ways of doing things), yet it deals with existing market structures. While it may build competitive advantage and take market share from others, it does not destroy the competition, which may, in any case, have the opportunity to copy the new ideas.

5.6. 'New Version' Attractions

Innovation aspects here may be the opening up of new market opportunities while preserving the existing imagescape in content and format, having the effect of rejuvenating the existing attraction because the current public has become too familiar with the product or the market has moved on, or a combination of the two. Spatial division of markets can be important, thus old concepts can work in new destinations, while new concepts are needed to move forward in established destinations. An example of the former is the gradual movement of Disney overseas, beginning with the establishment of Tokyo Disneyland. Similarly, Universal Studios has sought to increase their global presence through park development. This innovation route is analogous to yield management procedures, and heritage associations may partake of this by acquiring new properties and adapting them to visitors in areas where there is an under-supply of castles, palaces and stately homes open to the public. National museums and galleries have a public duty to display their collections and may open branches in different parts of their home country. Such developments are supply-led, as they are generating demand in spatial terms where it has not been previously, and in this sense they are leading the market. Hence there is a need for substantial market research and forecasting to take account of both the short-term conditions (economy, financial climate and the political situation) and the longer term (demographics, social values and lifestyle, technology, climate and environment). In contrast, product rejuvenation is a defensive strategy to retain existing attendances, requiring careful moni-

atrakcije kako bi se uhvatio priključak u odnosu na formulaciju proizvoda, prijedloga komunikacije i samih kanala komunikacije.

5.7. "Čudesne" atrakcije

Termin "čudesna" atrakcija ovdje koristimo kako bismo opisali one velike projekte koji snažno ekonomski utječu na svoje lokacije i koji su veoma traženi kao "predvodnički" poduhvati. U ovom je kvadrantu maksimalna neizvjesnost zbog brojnih nepoznanica a često i zbog veličine projekta koji, s jedne strane obeshrabruju konkurenciju ali s druge strane povećavaju financijsku osjetljivost. Međutim, ovaj kvadrant primjenljiv je na samo nekoliko projekata; primjeri su Disneyland California, EPCOT (otvoren 1982.), Sydneyska opera (otvorena 1973.), baltimorska luka Inner Harbour (otvorena tijekom 60-ih) i Milenijska kupola. Znatna većina svih atrakcija projektirana je za manje od 200.000 posjetitelja što minimizira rizik u razvijenim destinacijama.

Ovakve projekte uglavnom financiraju vlade koje su veliki vlasnici atrakcija ili velike korporacije koje imaju interes u turističkom sektoru. Komercijalni operatori pažljivo ograničavaju svoju financijsku izloženost te obično krenu u projekt uz potporu javnog sektora kako bi rasporedili rizike i osigurali vanjsko financiranje. Novac, također, može doći samo iz javnog ili kvazi-javnog sektora. Niz atrakcija u Velikoj Britaniji s "milenijskom vizijom", čija se izgradnja financirala iz Fonda baštinske lutrija (Heritage Lottery Fund) spada u ovu kategoriju premda nisu, kao što smo ranije primijetili, bile obavezno uspješne. U Europi su se mnogi projekti pokretali kroz Fond europskog regionalnog razvoja (European Regional Development Fund), a mnoge članice EU nude neki od oblika investicijske podrške za nove turističke projekte. Takvi načini financiranja dodatak su mnogim načinima kojima je javni sektor pokušao uspostaviti "pravu klimu" za razvoj turizma.

toring of key market trends affecting attractions for catching up in terms of product formulation, the communications proposition and the channels of communication.

5.7. 'Wonder' Attractions

The term 'wonder' attraction is used here to describe those very large projects that have major economic impacts on their location and are eagerly sought after as 'flagship' enterprise. Maximum uncertainty holds in this quadrant because of the number of unknowns and often the scale of the project, which on the one hand deters competition but on the other increases financial exposure. However, this quadrant only applies to relatively few projects; examples being Disneyland in California, EPCOT (opened in 1982), the Sydney Opera House (opened in 1973), Baltimore's Inner Harbor development (during the 1960s), and the Millennium Dome. This is because a substantial majority of all attractions are geared to fewer than 200,000 visitors, which minimizes the risk of scale in developed destinations.

Governments, very large attraction operators, or major corporations with a leisure interest, are the ones who fund projects of this kind. Commercial operators are careful to limit their financial exposure, so usually proceed with public-sector support, both in terms of kind (usually land) and cash, so as to spread the risks and help draw in external finance. Alternatively, money may come solely from public or quasi-public funds. The spate of 'millennium vision' attractions sponsored by the Heritage Lottery Fund in the UK fell into this category, though not necessarily, as noted earlier, to good effect. In Europe, many large projects have been initiated through the European Regional Development Fund and most members of the European Union offer some form of investment support to new tourism projects. Such funding is in addition to the many other ways where the public sector has tried to set the 'right climate' for tourism development.

Neuspjesi "čudesnih" projekata na financijskoj strani obično dolaze zbog:

- Prevelikih kapitalnih troškova zbog kojih se projekt nije mogao financirati s gledišta prikupljanja kapitala koji bi odgovarao dugu. Primjeri uključuju tematske parkove u Velikoj Britaniji: Wonderworld blizu Corbya u Northamptonshireu i projekt Battersea u Londonu koji je predložen za financiranje gradu Londonu u 80-ima;
- Zastoj u izgradnji ili krive procjene troškova izgradnje koji dovode do ozbiljnih prekoračenja troškova te potreba za refinanciranjem, kao u slučaju Sydneyske opere u 60-ima koja je završena 10 godina kasnije i to s 14 puta većim troškovima od izvorno planiranih;
- Ignoriranja zahtjeva ulagača zbog njihovog uključivanja na kraju izrade studije isplativosti, iako bi bilo prikladnije da ih se uključilo na početku;
- Promjena specifikacije projekta neko vrijeme nakon njegovog početka, što dovodi do znatnih promjena troškova te probijanja budžeta, kao što je bio slučaj s Milenijskom kupolom koja je trebala biti dovršena do listopada 1999. da bi se službeno otvorila 31. prosinca 1999. No, radovi su jedva završeni do službenog otvorenja 31. prosinca. Prvi utisci su važni, ali do mekog otvaranja nije došlo pa su se problemi morali rješavati pred očima medija i posjetitelja koji su platili ulaz;
- Kao odgovor političkom zanosu, projekt se preproda napuhivanjem prihoda i ekonomske koristi podcjenjivanjem troškova te utjecaja na društvo i okoliš uz svijest da se građevinska faza više ne može vratiti na početak. Jednom kada projekt započne mora se završiti jer zastoj dovodi do gubitka političke i komercijalne vjerodostojnosti. Na primjer, unutar godinu dana od dobijanja natječaja 2005. godine, budžet za Olimpijske

The downfall of 'wonder' projects on the financial side has commonly come from:

- Too large a capital cost, making the project unfundable from the standpoint of raising equity to match debt. Examples include the proposed theme parks in the UK of Wonderworld near Corby in Northamptonshire and the Battersea project in London, that came forward to the City of London for finance during the 1980s;
- Delays in building or underestimation of construction costs which lead to serious cost overruns and the need for refinancing, as in the case of the Sydney Opera House in the 1960s, which was completed 10 years late and more than 14 times its original budget;
- Ignoring funders' demands by bringing them in at the end of all the feasibility work, when it would have been more appropriate to have them in at the beginning;
- Changing project specification some way into its development, thus incurring step changes in costs and therefore overruns against the original budget, as in the Millennium Dome which was intended to be complete by October 1999 for the official opening on 31 December 1999, but only just managed to open for 31 December. First impressions count, but the customary 'soft' opening was not to be, so the Dome's glitches had to be dealt with in the full gaze of the media and paying visitors;
- In response to political enthusiasm, the project is oversold by inflating revenues and economics benefits, and underestimating costs, and social and environmental impacts, in the knowledge that the construction phase is irreversible. Once development has started it has to be completed, for calling a halt will lead to a loss of political and commercial credibility. For example, within one year of winning the bid in 2005, the budget for the London

igre u Londonu 2012. narastao je s £2,4 na £9,3 milijardi, ali ga se doživljava kao važan projekt regeneracije istočnog Londona, pa se sada održava "psihoprihodom" od uspješnog nastupa britanskih sportaša na Olimpijadi u Pekingu.

Za "čudesne" atrakcije inovativni proces može krenuti od etabliranih sustava isporuke *slikobraza* na lokacijama i postavlja novi marketinški plan i komunikacijsku strategiju koja onda postaje inspiracija za daljnji razvoj. Uspješni projekti ove vrste postavljaju novu strukturu za industriju i novi okvir u kojem će konkurencija nastati i razviti se te postavlja buduće standarde. Procjene tržišta za ovakve jedinstvene atrakcije su izuzetno teške. Na primjer, procjene o broju posjetitelja Milenijske kupole kretale su se od 8 do 17 milijuna. Vlada je bila spremna prihvatiti brojku od 12 milijuna i na toj bazi napraviti budžet pod uvjetom da to bude javni festival za svakog tko želi doći. U ovakvim okolnostima potrebno je izgraditi veliku bazu podataka marketinških trendova u različitim turističkim aktivnostima, napraviti procjene budućih promjena i razmotriti projekt u situaciji "sa i bez". Razvijanje projektnih scenarija, kako bi se u potpunosti shvatilo što se predlaže i koji su rizici, važnije je od realnih projekcija, premda su potonje potrebne da bi se dale dimenzije projektu i da bi se procijenio njihov utjecaj na ekonomiju.

5.8. Životni ciklus proizvoda

Iz tržišne perspektive u srcu je atrakcijskog proizvoda i njegovog razvoja ohrabrivanje ponovnih posjeta, osim ako je tržište doživljava globalno, što rezultira gravitacijska populacija čija je veličina neograničena za sve intenzivne svrhe (? all intensive purposes) jer se kontinuirano obnavlja. Slika 3 pokazuje dva životna ciklusa proizvoda, jedan za ponovne posjetitelje a drugi za jedin-

Olympics in 2012 rose from £2.4 billion to £9.3 billion, but it is seen as a major regeneration project for East London and is now buoyed up by the 'psychic income' resulting from the success of the British team at the Beijing Olympics.

For 'wonder' attractions, the innovation process can be one that departs from established imagescape delivery systems in their location and sets down a new marketing agenda and communication strategy, which then becomes an inspiration for subsequent development. Successful projects of this kind lay down a new structure for the industry and the new framework in which competition will occur and develop, setting future standards for some time to come. Market assessment for such unique attractions is notoriously difficult. For example the estimates of visitor numbers for the Millennium Dome ranged from 8 million to 17 million. Twelve million was the figure that the Government was prepared to accept and budget for, on the basis that it was meant to be a public festival for everyone who might want to come. In these circumstances, there is a need to build up a large database of market trends in different leisure activities, make future change assumptions (predictions) and consider the project in a 'with and without' situation. Developing project scenarios so as to give a thorough understanding of what is being proposed and the risks involved is more important than the actual projections, though the latter are required to give dimensions to the project and to assess its impact on the economy.

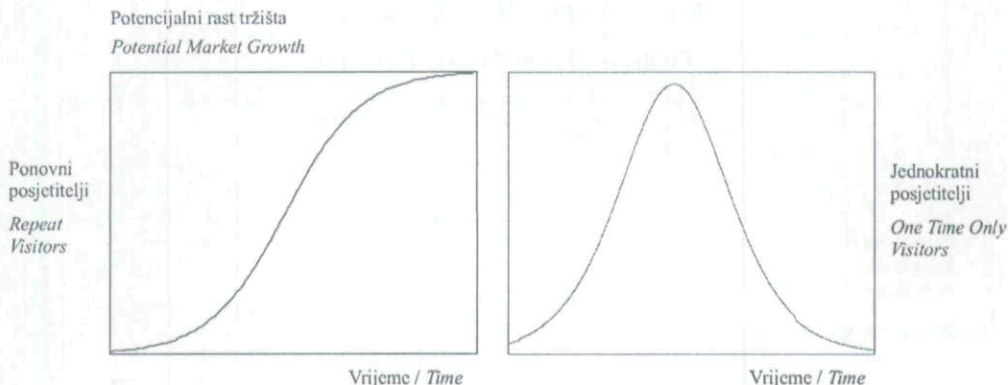
5.8. Product Life Cycle

From a market perspective, at the heart of the attraction product and its development is the encouragement of repeat visits, unless the market for the experience is global, which therefore provides a catchment population that is to all intensive purposes infinite in size, since it is continually being replenished.

stven doživljaj, koji su nastali iz logistički generirajućih procesa.³⁰

Figure 3 shows two product life cycles, one for repeat visitors and the other for the once only experience, that are derived from logistic generating processes²⁹.

Slika 3. Životni ciklus atrakcija
Figure 3 Attraction Life Cycle



Zabavne atrakcije poput kina i kazališta mogu opstati na samo jednoj kupnji doživljaja jer neprestano mijenjaju jezgru, dok tematski parkovi sadrže uzbudljive vožnje za koje postoji ponovna potražnja koja se pojačava sa stalnim programom novih i ponovno obrađenih tema kako bi se potrošače uvjerilo da se vrata. Slično je i sa sadržajima shoppinga koji stalno obnavljaju svoje proizvode u skladu s modom. Ali za većinu atrakcija koje nisu napravljene u tu svrhu, njihova sposobnost da održe broj posjeta je funkcionalno vezana uz veličinu i dinamiku njihovog tržišta i njihovu sposobnost da promijene bitne *slikobrazne* i poboljšaju ih pomoću specijalnih događaja i ostalih dodatnih sadržaja. U tom smislu nacionalne galerije su u znatnoj prednosti zbog veličine zbirke; na primjer, ranije spomenuti Muzej Victorije i Alberta izlaže tek oko 3% od više od 4 milijuna izložaka koje ima na raspolaganju, premda ih je još više dostupno u nje-

Entertainment attractions, such as cinemas and theatres are able to survive on one time only purchases of the experience, because they continually change the core, while theme parks embody thrill rides for which there is a repetitive demand that they reinforce with a rolling programme of replacement and retheming to persuade their customers to return. Similarly, leisure shopping facilities continually replace their merchandise in line with fashion, but for the majority of visitor attractions that were not built for such purposes, their ability to maintain attendances is functionally related to the size and dynamics of their market, and their capacity to alter the core imagescape and supplement it by special events and other supporting features. To this extent, national museums are at a considerable advantage because of the size of their collections; for example, the Victoria and Albert Museum, mentioned earlier has only about

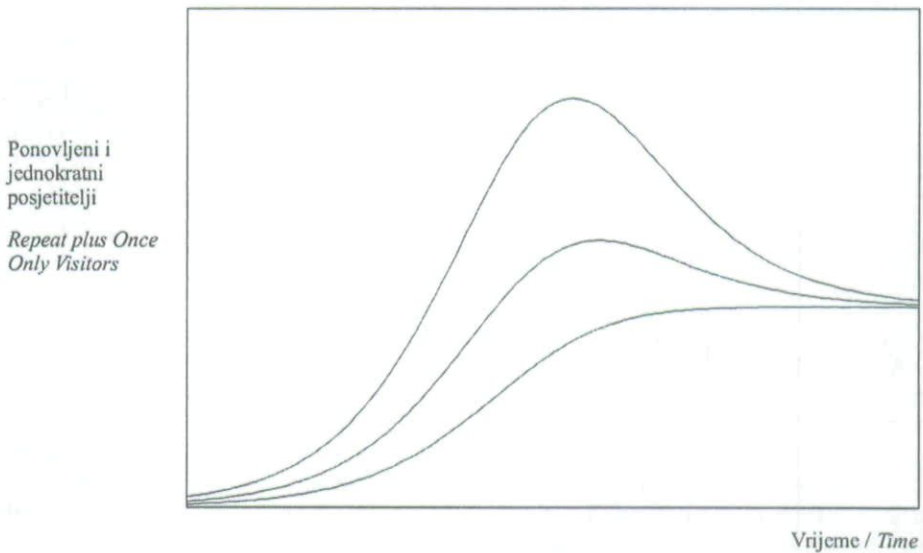
³⁰ Lundtorp, S., and Wanhill, S. (2001). Resort life cycle theory: generating processes and estimation. *Annals of Tourism Research*, 28(4), 947-964.

govim prostorima za čitanje, učenje ili tiskanje. Muzeji i galerije mogu organizirati posebne postavbe i uključiti se u međunarodnu razmjenu vrhunskih izložaka.

three per cent of more than four million objects on public display, although more are accessible in its reading, study and print rooms. They are able to put on special exhibitions and engage in lending/borrowing prize exhibits internationally.

Slika 4. Životni ciklus miješanog tržišta

Figure 4 Mixed Market Life Cycle



Slika 4 prikazuje kombinirano tržište za jednokratne i povratne posjete spajajući dvije krivulje na Slici 3. Mnoge atrakcije prolaze kroz fazu slave, bilo da se radi o prigušenoj potražnji da se vidi zbirka, kao što je slučaj kod muzeja, o čemu svjedoči ranije spomenuti primjer Kraljevske oružarnice, bilo da proizvod nudi potpuno novi doživljaj na tom polju. Što je na tržištu veći udio posjetitelja koji su tu tek prvi put, to se ciklus penje više i pad na održivu razinu je veći, kao što ilustrira Slika 4.

Figure 4 shows the combined market for once only and repeats by joining the two curves shown in Figure 3. Most attractions pass through a celebratory phase, either because there is a pent-up demand to see a collection as in the case of a museum, as witnessed by the example of the Royal Armouries cited earlier, or the project offers the newest experience in its field. The higher the proportion of first time only visitors in the market, the more peaked is the cycle and the greater is the drop to a sustainable level, as illustrated in Figure 4.

6. USPJEŠNA INOVACIJA ATRAKCIJA

Kada je većina atrakcija nekorporativna, a mnoge neprofitne i nemaju konvencionalne pokazatelje dobiti ili gubitka već samo nekoliko ciljeva nastalih zbog različitih ideala, nije lako procijeniti što je ono što čini uspješnu inovaciju. Sljedeći kriteriji mogu poslužiti kao temelj za priznavanje uspjeha:

- Atrakcija zadovoljava deklarirane i iskreno zacrtane ciljeve, poput kvalitete doživljaja, zadovoljavanje posjetiteljevih ciljeva i osiguravanje kontinuirane potražnje;
- Povećava šanse za opstanak tvrtke;
- Dodaje više vrijednosti, bez obzira na način mjerenja, nego što se konzumiralo;
- Ne sprječava vrednije inovacije;
- Rezultati poslovanja zadovoljavaju mjera koja opravdavaju inovaciju;
- Prilagodljiva je budućim promjenama glede posjetiteljevog ukusa i očekivanja.

Pokazano je da je vezivanje uz *slikobraz* značajna komponenta popularnosti atrakcije. Komercijalne atrakcije, bile to "ja također" projekti niskog rizika ili "čudesni" projekti visokog rizika, pokušavaju ispuniti ove kriterije uspješnosti stvaranjem vrijednosti za novac oko reproduktivnih *slikobraz* koji manje ili više imaju opću privlačnost. Mediji također mogu pretvoriti nepoznate atrakcije u reproduktivne *slikobraz* koristeći ih kao kulise za filmove i televizijske programe^{31,32}, premda Beeton³³ upozorava na pretjeranu medijsku agresivnost u ovakvim situacijama. Ideja o uporabi repro-

6. SUCCESSFUL ATTRACTION INNOVATION

When the majority of attractions are non-corporate and a good many are in the not-for-profit sector and do not have a conventional 'bottom-line', but rather several objectives arising from different ideals, it is not easy to assess what constitutes successful innovation. The following criteria may serve as the basis for recognising success:

- The attraction meets stated and honestly intended goals, such as offering a quality experience, meeting visitor targets or ensuring continuous demand;
- Enhances the survival of the organisation;
- Adds more value, however measured, than is consumed;
- Does not stand in the way of more valuable innovations;
- Operational performance meets benchmarks that justify the innovation;
- Can be adapted to future changes in visitor tastes and expectations.

It has been shown that imagescape association is a significant ingredient in the popularity of an attraction. Commercial attractions, whether they are low risk 'me too' developments or high risk 'wonder' projects, try to meet these success criteria through creating value for money around reproductive imagescapes that have more or less universal appeal. The media are also capable of taking unknown attractions and developing them as reproductive imagescapes through their use as backdrops for films and television programmes^{31,32}, though Beeton³³ warns about excessive media hype in these situations. The idea of

³¹ Riley, R., and Van Doren, C. (1992). Movies as tourism promotion: a 'pull' factor in a 'push' location. *Tourism Management*, 13(3), 267-274.

³² Tooke, N., and Baker, M. (1996). Seeing is believing: the effect of films on visitor numbers to screened locations. *Tourism Management*, 17(2), 87-94.

³³ Beeton, S. (2006). Understanding film-induced tourism. *Tourism Analysis*, 11(2), 181-188.

duktivnih *slikobraza* naziva se "reverzni" razvoj proizvoda³⁴ i jasno je vidljiva kod industrijskih atrakcija gdje se konačni proizvod proizvodnog procesa koristi kao sastojak u kreiranju posjetiteljevog doživljaja. Muzeji i galerije koriste ovu formulu izlažući predmete i radove od kojih mnogi možda već imaju posebnu vrijednost i asocijaciju u posjetiteljevoj glavi čak i na stimulativnije načine.

Izgleda, dakle, da je stvaranje reproduktivnih *slikobraza* dovoljan uvjet za uspjeh atrakcije kod publike, što podliježe imanentnoj neizvjesnosti nuđenja doživljajnog proizvoda iako nije i neminovno uvjet za sve atrakcije. Sydneyska opera odmah je postala popularni simbol čim su neugodne činjenice vezane uz financije zaboravljene. Danas se inovativna arhitektura razvija kao sastavni dio novih atrakcijskih projekata. To daje težinu argumentu koji često koriste institucije koje se bave ovim stvarima, a taj je da umjetnost i kulturne atrakcije treba vrednovati same za sebe a da posljedice varijacija njihovih financijskih i ekonomskih rezultata nisu važne, što evaluaciju čini nebitnom. Iz perspektive društvene skrbi, opće je prihvaćeno da su kulturne aktivnosti javna dobra koja za društvo kao cjelinu generiraju potrošačke izvanjske sadržaje poput poboljšanja kreativnosti stanovništva, kvalitete života, identiteta, društvene kritike, estetike, pluralizma i tako dalje. Ovo su valjani argumenti za dobivanje pomoći ili potpore javnog sektora, ali evaluacija se još uvijek može provoditi uporabom surogatnih tržišnih tehnika kao što je Metoda neizvjesnog vrednovanja (CVM)³⁵. To je relativno nova metoda analiziranja koja pristupa direktno tako da uspostavlja hipotetska tržišta za određenu atrakciju i ispituje uzorak osoba o njihovoj spremnosti da plate za neki projekt. Termin CVM se koristi jer odgovori

using reproductive imagescapes has been referred to as 'reverse' product development³⁴, and is plainly evident in industrial attractions where the final output of the manufacturing process is used as an input for creating the visitor experience. Museums and galleries also follow this formula by displaying objects and works, many of which may already have a high intrinsic value and association in the public's mind, in ever more stimulating ways.

It seems therefore that creating a reproductive imagescape is a sufficient condition for attraction success with the public, subject to the inherent uncertainty involved in providing an experiential good, but not a necessary condition for all attractions. Thus the Sydney Opera House became an immediately popular symbol once the financial embarrassment was put aside. Today innovative architecture is evolving as an integral part of new attraction development. This lends weight to the argument often put forward by institutions dealing with these matters that arts and cultural attractions should be valued for their own sake, and the consequences when they vary in their economic and financial outcomes are unimportant, so that evaluation is irrelevant. From a welfare perspective, it is accepted that cultural activities are public goods that generate consumption externalities for society as a whole, such as adding to the creativity of the population, quality of life, identity, social criticism, aesthetics, pluralism and so forth. These are legitimate arguments for public provision or subsidy, but evaluation is still possible using surrogate market techniques, such as the Contingent Valuation Method (CVM)³⁵. It is a relatively recent method of analysis that takes a direct approach by setting up hypothetical markets for the attraction in question and surveying a sample of individuals for their willingness to pay for any developments. The

³⁴ Barras, R. (1986). Towards a theory of innovation in services. *Research Policy*, 15, 161-73.

³⁵ Dwyer L, Forsyth P., and Spurr R. (2006). Assessing the economic impacts of events: a Computable General Equilibrium approach. *Journal of Travel Research*, 45(1), 59-66.

ovise o situaciji na hipotetskom tržištu koje ispitivač opisuje potrošaču ili nepotrošaču nakon uključivanja opće populacije u uzorak. Na taj način CVM je jedina metoda kojom se može procijeniti sveukupna vrijednost (uporaba, neuporaba i opcijnska vrijednost) kulturnih ili baštinskih atrakcija na korist lokalne zajednice.

U suprotnosti s ovim, kretanje javnog sektora prema većoj tržišnoj orijentiranosti u trošenju javnog novca, koju podržavaju ministarstva financija, dovelo je operativne potražnje za boljim gospodarstvenim rezultatima javno potpomognutih atrakcija koje su prilagođene posjetiteljima. Tržišni modeli koriste se kako bi se ocijenio njihov ekonomski utjecaj na široj platformi u skladu s njihovim doprinosom kao dio turističkog proizvoda lokalnoj ekonomiji.³⁶ Kada se naplaćuju ulaznice, obično se naglašava neka razina financijske održivosti u smislu povrata troškova što neprofitne atrakcije približava onim komercijalnim. Neuspješne javno financirane atrakcije s pravom izazivaju prezir kod nekih komercijalnih operatora. Oni tvrde ukoliko javno financiranje i inflacija proizvoda rezultiraju situacijom gdje nema odnosa između troška isporuke i onoga što potrošač stvarno plaća, onda je to slučaj predatorskih cijena (tehnički se definiraju kao cijene ulaznica koje su ispod prosječnog promjenjivog troška isporuke) na prezasićenom tržištu i koje će im vjerojatno nanijeti komercijalne štete. Vlade su osjetljive na ovu vrstu kritike i zbog toga je važno uravnotežiti ishode s prioritetima pripisanim raznim ciljevima i eliminirati sukobe koliko je to moguće. Zanemarivanje prethodnog čest je izvor nesporazuma čiji su ishod atrakcije koje možda ne mogu zadovoljiti kriterije uspješnosti jer će rasplinjavanje ciljeva zamagliti *slikobraz* dopuštajući prihvaćanje gotovo svakog ishoda što onda iskrivljuje svaki sustav dobivanja povratne

term CVM is used because the responses depend on the hypothetical market situation that the interviewer describes to the consumer or non-consumer when the population at large is taken into the sample frame. In this manner CVM is the only method capable of estimating the total value (use, non-use and option value) of a cultural or heritage attraction for the benefit of the local community.

In contrast to this, movements towards greater market orientation in public spending, supported by government finance ministries, have led to operational demands for improved economic performance from publicly supported attractions that have been adapted for visitors. Market models are used to evaluate their economic impact on a wider platform in accordance with their contribution to the local economy as a component of the tourist product³⁶. When admission is charged, some level of financial viability in terms of cost recovery is usually stressed, which brings not-for-profit attractions closer to the workings of commercial operators. Failing public sector attractions rightly raise scorn from commercial operators. They argue that if public funding and project inflation results in a situation where there is no relationship between the cost of delivering and what the customer actually pays, then this is a case of predatory pricing (technically defined as the admission charge being below the average variable cost of provision) in an over-supplied market that is likely to harm them commercially. Governments are sensitive to this kind of criticism and so it is important to balance outcomes against the priorities assigned to the various objectives and to eliminate, as far as possible, conflicts. Neglecting to do so is the source of frequent misunderstandings, resulting in attractions that may not meet the success criteria, since goal diffusion will keep the imagescape vague, allowing almost every outcome to be reconciled, which in turn disrupts any feed

³⁶ Epstein, R. (2003). The regrettable necessity of Contingent Valuation. *Journal of Cultural Economics*. 27(3), 259-274.

informacije kojim bi se otkrile greške te se tako zaobilaze promjene kao odgovor na tržišne trendove.

Dodatna komplikacija za "čudesne" atrakcije je njihova razina jedinstvenosti što je slučaj sa projektima koje je financirala britanska Milenijska komisija (Millenium Commission): što je atrakcija jedinstvenija, to se teže može uspoređivati s drugima što joj onda omogućava da slijedi svoj unutarnji kriterij poslovanja. Vanjska se kritika može odbaciti tvrdnjom da je "veliki korak unaprijed" onkraj vizije i razumijevanja kritičara. Ipak, pouke iz prošlosti su jasne: velike projekte ne treba realizirati ako njihova funkcija nije jasna, ako se ne razmišlja o razmještanju posjetitelja s drugih lokacija i ako "prava" studija isplativosti nije napravljena kako bi se priroda mogućih rizika u potpunosti shvatila i prihvatila.

Ranije je primijećeno da je anticipativne *slikobrazne* teško smjestiti u tržišni kontekst, tako da ovdje metodologija ocjenjivanja obično ima oblik socio-političke procjene gdje se imenuje grupa stručnjaka koji procjenjuju vrijednost kulturnog događaja i savjetuju relevantne vlasti. Motivi zagovaranja ovakvih atrakcija idu od vizionarske "velike ideje" kroz racionalne filozofske i ideje društvene skrbi, lokalnog ponosa i prestiža do slabo prikrivenih izbornih kalkulacija. S obzirom na sve gore navedeno, javni su službenici uvijek tijekom pripremnih mjeseci prije političkih izbora zabrinuti huće li projekti koji ne uspijevaju preskočiti ekonomske prepreke, ali su javnosti veoma vidljivi, dobiti zeleno svijetlo. Stoga će u ovom slučaju socio-politička procjena biti u suprotnosti s projektnim ciljem izgradnje održive turističke atrakcije, kao u slučaju Milenijske kupole gdje se politika znatno miješala u rad tvrtke New Millenium Experience Company koja je odabrana za vođenje projekta. U ovakvim slučajevima javni službenici traže pismena uputstva ministara kako bi se osigurali od odgovornosti u odnosu na javne financije u slučaju

back system to recognise malfunctions, thus avoiding change in response to market trends.

An added complication for 'wonder' attractions is their degree of uniqueness, as in the case of developments funded by the UK Millennium Commission: the more particular the attraction, the less it can be compared to others, making it easier to pursue its own internal criteria of performance. Outside criticism can be dismissed by stating that the 'great leap forward' is beyond the vision and understanding of those who criticise. Yet the lessons of the past are clear: major attraction projects should not be undertaken unless their function is clear, visitor displacement from elsewhere has been considered, and a 'proper' feasibility study has been carried out so that the nature of the risks involved are thoroughly understood and accepted.

It was noted earlier that anticipatory imagescapes are difficult to place within a market context, so the appraisal methodology here is commonly in the form of socio-political assessment, whereby a panel of experts is appointed to evaluate the worth of a cultural event and give advice to the relevant authority. Advocacy for such attractions ranges from the visionary 'big idea', through rational philosophical and welfare values, community pride and prestige, to barely concealed electoral calculations. In respect of the latter, it is always a matter of some agitation to public servants, during the preparatory months before a political election, as to whether such projects, which fail economic hurdles but have a high visibility, will receive permission to go ahead. Thus, in this instance, the socio-political assessment will run counter to the project objective of building a viable tourist attraction, as was the case for the Millennium Dome, where there was considerable political interference with the decisions of the organisation created to run the event, the New Millennium Experience Company. It is in such cases that civil servants ask for written ministerial instructions to ensure that matters of accountability for

promjena u trenutnoj vladi. Naravno, mora se priznati da ekonomska računica nije u stanju pokriti sve aspekte procesa evaluacije atrakcijskog projekta. Kada bi to ona bila u stanju, onda ne bi bilo potrebe za osobom koja donosi odluke. Stoga su u konačnici svi atrakcijski projekti koje podržava javni sektor do određene granice podložni socio-političkoj procjeni.

7. ZAKLJUČCI

Kada se bavimo posjetiteljskim atrakcijama broj permutacija vezanih uz raznolikost *slikobraza* (Tablica 1), organizacija (Tablica 2) i načina klasifikacije atrakcija je neizmjeran. Iz perspektive inovacije korisna je ona klasifikacija koja će smjestiti atrakcije na skalu koja na jednom kraju ima one koje su izgrađene ili dizajnirane za potrebe posjetitelja, i koje su u manjini, a na drugom kraju navesti resurse i sadržaje koji nisu za posjetitelje niti im se mogu prilagoditi. Većina atrakcija je razmještena između ova dva pola. Ovo je povezano s vlasništvom i brojnim ciljevima koji pritišću razne vlasničke strukture. Kada se atrakcije prilagode posjetiteljima, raste i pritisak da se uspjeh interpretira u smislu kvalitete doživljaja i broja posjetitelja.

Pod pretpostavkom da je broj posjetitelja cilj poslovanja, ključni atrakcijski koncepti – tržište, *slikobraz* i lokacija – a primijetili smo da je za većinu atrakcija njihova lokacija već predodređena okolnostima, što samo po sebi predstavlja immanentnu opasnost vezanu za sposobnost dopiranja do tržišta. Čak i za neobvezne atrakcije dostupnost lokacija u razvijenom svijetu je limitirana i u mnogim slučajevima je podložna javnoj kontroli. Ovo daje veću težinu spletu tržišta-*slikobraza* (Tablica 3), razini neizvjesnosti povezanoj s razinom inovacije i potrebi za razvijanjem *slikobraza* za kojim je potražnja više-manje stalna kroz univerzalnost njegove popularnosti. Dok je ovo spremno prihvaćeno u slučaju zabavnih atrakcija, u mu-

public funds are settled, should there be any change in the government of the day. Of course it must be recognized that economic calculus cannot cover all aspects of the attraction evaluation process. If it were to, then there would be no need for a 'decision-maker', thus, in the final analysis, all publicly supported attraction projects are subject to socio-political assessment to some degree.

7. CONCLUSIONS

When dealing with visitor attractions it will be readily appreciated that the number of permutations to do with the variety of imagescapes (Table 1), organisations (Table 2), and ways of classifying attractions are immense. From an innovation perspective, a useful classification is to place attractions on a scale that has at one end those that have been built or designed for visitor purposes, which are in the minority, and at the other, resources and facilities that are neither for visitors nor can be adapted for them, with the bulk of attractions spread out between these two poles. This is linked to the pattern of ownership and the multiple objectives that beset different ownership structures. Once attractions have been adapted for visitors then pressure builds up to interpret success in terms of the quality of the experience, visitor numbers.

On the presumption that visitor numbers are a performance target, key attraction concepts - the Market, Imagescape and Location - for the majority of attractions is their location and is already proscribed by circumstances, which in itself has inherent dangers to do with being able to reach out to the market, and even for footloose attractions the availability of sites in the developed world is limited and found to be, in many instances, under public sector control. This throws greater weight on the Market-Imagescape mix (Table 3), the degree of uncertainty associated with the level of innovation and the need to develop an imagescape for which

zejskom svijetu obveza za populariziranjem proizvoda potakla je zabrinutost zbog pretjerane izrežiranosti doživljaja, u smislu pretjeranog naglaska na tehnologiju, što onda prenaglašava medije a ne poruku koja je utjelovljena u temelj resursa.

Untar komercijalnog sektora uspješne atrakcije su obično one koje su pratile obrnuti slijed razvoja proizvoda; to jest, stvarale reproduktivne *slikobraze* od proizvoda dizajniranih za druge svrhe i druge industrije. Slično je i s neprofitnim sektorom, model reverznog razvoja proizvoda podržava opservaciju da su najbolji muzeji oni koji imaju dobre zbirke i koriste tehnologiju kako bi dodali vrijednost doživljaju. Koristiti se samo tehnologijom znači ući u ciklus mode (slično "dvo- ili trogodišnjem fenomenu tobogana" luna parkova) koji mogu biti neodrživi na dugi rok premda se taj put ne smije miješati s velikim muzejima koji postupno moderniziraju ili obnavljaju svoje razne odjele. Stoga, uspješna inovacija razvoja atrakcije podrazumijeva kreiranje *slikobraza* s jakim asocijacijama koje su različite, ali ne previše, a dovoljno su fleksibilne da potiču posjetitelje na ponovne posjete.

demand is more or less continuous through the universality of its popularity. While this is readily accepted in the case of entertainment attractions, in the museum world, the commitment to popularising the product has raised concerns about over-staging the experience, in the sense of being too technologically driven, which over-emphasizes the media rather than the message embodied in the resource base.

Within the commercial sector, attractions that are flourishing are often those that have followed the reverse product development sequence; namely, the creation of reproductive imagescapes from products designed for other purposes and in other industries. Similarly, in the not-for-profit sector, the reverse product development model supports the observation that winning museums are those that have good collections and use technology to add value to the experience. To take the technology route alone is to embark on a fashion cycle (similar to the 'two-three year rollercoasterism' phenomenon of ride parks) that may be unsustainable in the longer term, though this route is not to be confused with major museums that sequentially update or renew their various departments as a matter of course. Successful innovation in attraction development is therefore about the creation of imagescapes that have strong associations, are different, but not too different and are flexible enough to encourage visitors to return.

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