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## Economic Perspective 2

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### SCOTTISH TOURISM - PREMIER LEAGUE CHARMS BUT SECOND DIVISION ATTRACTIONS

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The English Tourist Board's (ETB) latest Tourism Investment Report(1) which covers the second half of last year identifies £961 million of tourism investment as being underway or as having been completed in England during the survey period. Over one-third of this (39%) was attributable to new hotel development. It is also noteworthy that exactly one-third of the total investment occurred in London. The report remarks that outside the hotel sector there is "little evidence generally of major institutional investment". This is especially true of the attraction sector.

One significant attraction/accommodation project referred to in the report and in the ETB's recently published development strategy document(2), is Sporthuis Centrum's new 600 chalet development in Sherwood Forest. The company has a chain of holiday villages in Holland and Germany. Each is set in woodland and comprises furnished self-service chalets with associated retail and catering outlets, all of which clusters around a tropical indoor pool. The Sherwood Forest complex is operated by Center Pans (the UK subsidiary of Sporthuis Centrum) and opens later this year at a total capital cost of £31 million. Center Pans have plans for another forest development. Regrettably from a Scottish perspective, this will be situated in Suffolk.

Capital investment in sophisticated water entertainment also lies at back of the remarkable Butlin's revival. Having traded erratically throughout the 1970s and disastrously in the 1980s, the company was subjected to a comprehensive reappraisal by the management of the parent Rank Organisation. Three of the eight camps were sold off (Barry Island, Clacton and Filey) and a £50 million investment programme phased over 5 years began late in 1984. Initially £10 million was spent on the Minehead centre during 1985 which included an indoor 'waterworld' (£2.5 million), new self-catering accommodation (£4.5 million) and a refurbished night club (£0.75 million). A further £30 million has been spent this winter in a broadly similar manner at the Bognor and Skegness operations.

This major capital programme is running in tandem with increased marketing activity: the 'camps' have been restyled as 'holiday worlds', full board and mass feeding arrangements have just about disappeared, and well-appointed self-catering chalets have taken the place of the original, spartan huts. While the UK domestic holiday market as a whole contracted in volume terms by some 5% in 1986, Butlins experienced a 10% rise over the previous year in main season bookings. The increase at the flagship Minehead site was 36% and here 27% of the visitors received were newcomers ie had never been on a Butlins holiday before. This finding must be particularly welcome to Butlins,

as the hallmark of their decline in the early 1980s was a near total market reliance on elderly repeat visitors. Overall last year, three of the Butlins centres - Bognor, Minehead and Skegness - increased their trading profits. The two other sites - at Ayr and Pwelli - turned in lower profits. These two 'worlds' have yet to figure prominently in the current investment programme and may yet be closed by Rank.

The ETB's development strategy highlights many of the ambitious and exciting new innovations which over the past decade have enhanced England's attractions base. Private sector schemes include commercially-run heritage attractions, the prototypes of which are the Jorvik Viking Centre at York and various of the Madam Tussaud's operations - notably the rejuvenated Baker Street waxworks, the Royalty and Empire exhibition at Windsor, Warwick Castle, and Wookey Hall. There are also theme parks of which the undoubted leader is John Broome's Alton Towers. With over two million visitors per annum, it can lay claim to being Europe's premier theme park and has become so as a result of a phased capital investment programme in so-called "white-knuckle" rides. These began with the Corkscrew in 1980 and currently involve the construction of an Aerial Skyway.

Public sector innovations in the attractions sphere have emphasised two other major development concepts: exciting marine and industrial heritage projects (such as the Merseyside Maritime Museum and the Wigan Pier redevelopment) and at the seaside all-weather indoor resort complexes. The latter idea was pioneered by the Summerland complex (Isle of Man), and there followed similar facilities at Whitley Bay and Great Yarmouth. More recently there has been the Rhyl Sun Centre, Blackpool's Sandcastle Centre, and Bridlington's Leisure World. These indoor resort complexes require major capital investment with the Sandcastle Centre, for instance, costing £16m to build. Activities for

all age groups are provided for, invariably based around tropical fun-pools complete with flumes wave machines, solariums/saunas and artificial beaches.

Regrettably, Scotland's recent record in the development of created attractions appears as sub-standrad in comparison with England. The operators of the Jorvik Viking Centre, Heritage projects, do have plans to use the Tolbooth Kirk at the end of the Royal Mile in Edinburgh to stage an "intriguing replication of the life of Edinburgh from 1572 to 1625". The intention is to give visitors "...the exciting experience of discovering at first hand what it was like to live in the capital of Scotland during the Stuart period". However, the opening date originally targeted for - Spring 1988 - now looks optimistic: problems relating to parking and to the establishment of an appropriate funding package may well lead to the project eventually being scrapped. Madame Tussauds have no Scottish presence and major theme parks such as Alton Towers are hardly feasible because of the relative weakness of local catchment markets. The Aviemore leisure complex, if restyled by the Stakis Organisation, could yet prove to be the exception.

As far as major public authority schemes are concerned, the prime opportunities would appear to be those presented by the Glasgow National Garden Festival and plans to develop Dundee's waterfront and New Lanark.

The New Lanark scheme is now well advanced. Last year the area received about 80,000 visitors and projections for the next decade are looking to treble this number. A £1.2m visitor centre development is planned for construction between 1987-89 which will include a restored steam engine, various displays, an audio visual presentation, and shop/cafeteria. Five public agencies are contributing grants which will finance

90% of the total funding package required, the remainder coming from voluntary sources. A feasibility study is presently being conducted for a new hotel development and the provision of low cost accommodation for young people is also under consideration.

In Scotland there are no real parallels to the indoor resort complexes which now characterise many of England's traditional seaside resorts. Somewhat surprisingly, such a facility was recommended as the means of realising Loch Lomond's untapped tourism potential in a study commissioned jointly in 1985 by the Scottish Tourist Board and the Scottish Development Agency. The consultants opined that the Rhy Sun Centre concept applied in Balloch at a capital cost of £6.5m would attract 500,000 visitors each year, permitting commercial as opposed to public authority operation. The consultants' calculations were decidedly shaky and the Balloch Sun Centre has never seen the light of day.

It is tempting to cite Loch Lomond as a micro-cosm of Scotland's tourist industry problem. There is a palpably huge potential: 30 miles of loch containing an impressive array of scenic, wildlife and historic/cultural resources, on top of which there is that world famous song. However, the huge potential is to a large extent unrealised. Visitors abound but they typically stay for relatively short periods of time and spend very little. There is no gateway visitor centre and no major attraction exists to access the Loch's appeal and capitalise on its popularity. Maid of the Loch has throughout the '80s rested in dry dock at Balloch in an unused and increasingly dilapidated state. The Cameron estate - site of the former Bear Park - is currently up for sale. The Regional park designation proposed for the Loch Lomond area in 1982 - a watered-down version of the national park idea found South of the Border - has still to emerge. On a brighter note, three major accommodation and leisure development schemes proposed for the Loch Lomond area are to be debated

this June by the planning committee in Dumbarton District Council.

There has in the past been insufficient recognition of the need to capitalise on Scotland's rich reserves of history, nature, culture and ethnicity via the development of popular and exciting created attractions. Moreover, the degree of commercialism involved is not to everyone's taste, witness the recent development proposals for Edinburgh Castle. The warning note sounded by this article is that Scotland has premier league charms but second division attractions. Things need to happen soon vis-a-vis Loch Lomond, Edinburgh, Castle and Aonach Moors, or else Scotland's prospects as a tourism destination will begin rapidly to fade away. This in turn requires new perceptions and attitudes, new techniques of intervention and an explicit development strategy for the Scottish tourist industry.

#### FOOTNOTES

- (1) English Tourist Board, **Tourism Investment Report**, July to December 1986, ETB, 1987.
- (2) English Tourist Board, **Development Strategies**, ETB, 1987.