

TiLEforum 2007

A Synopsis of the TiLEforum 2007

TiLEforum 2007, under the very able Chairmanship of Paul Carty, Managing Director, Guinness Storehouse, adopted a new format that focussed more on the conference and networking opportunities. The conference kicked off with a sumptuous buffet dinner at the Villa Erba, overlooking the magnificent scenery of Lake Como.

The main themes of the conference were:

- * Working in a rapidly changing business environment
- * Understanding and knowing your customer
- * External factors impacting the industry including environmental, Corporate Social Responsibilities (CSRs), changing demographics
- * Developments in branded attractions from theme parks to corporate brand centres
- * Trends in the industry
- * Technology developments and the renewed interest in 3D
- * Trend setters in theme parks and museums.

Paul Carty opened the conference with a presentation on the challenges and opportunities of gaining access to potential guests' time in a world of ever increasing choice. Connecting with a multi-cultural, multi-lingual society is impacting the way the message is presented to guests. With time at a premium, attractions must provide a "must do" menu to address the question in the guests' mind "Why should I give you some of my time?". Customer power, coupled with customer awareness is and will continue to drive the business into the future. It is no longer sufficient to adopt the attitude "build it and they will come". Customer power is replacing marketing power.

Mark Leslie of Martello Media, provided a fascinating insight into a development of a visitors' centre at the Cliffs of Moher, County Clare, Ireland. He drew attention to the need for attractions to be culturally acceptable to all visitors and reminded the conference of the expansion of the Chinese middle class which will have an impact on both the Chinese and international markets in the near future. Having a resonance with your customer and providing a range of diverse experiences, including spiritual uplift and relaxation, should not be forgotten as a part of the offering.

Dr John Falk of Oregon University, presented research on learning that occurs in the leisure industry which was undertaken when he was President of the Institute for Learning Innovation, Annapolis, Maryland. The market is moving towards the individual where adding value to leisure based experiences will provide a real market differentiator. John specifically identified how the role and the expectations of the guests change with time and place and he had identified 5 character traits that might need to be fulfilled: Explorer, Facilitator, Experience Seeker, Professional/Hobbyist, Spiritual Pilgrim. There is an increasing need to know and understand your guest before the visit.

A number of common factors came out of this first session and were repeated throughout the conference. Customer driven not marketing driven, need to develop strategies for personalising visits, authenticity, clarity of purpose and the pace of change.

Siân Johnson chaired a session on external factors that are affecting the industry with presentations by Yvonne Crook of View Marketing, Scotland and Dr Terry Stephens.

The Jacobite Experience is in the Loch Ness area of Scotland. The organisational structure has been changed to include high level visibility on environmental and SCR issues. The Jacobite Experience continues to develop with strong brand identification and brand management and has involved working closely with other providers in the region.

Terry Stephens provided a thought provoking presentation on the lack of real progress on CSRs and environmental issues which have been in discussion for some 15 years. The conference was reminded that the requirements were moving from the regime of opportunity to that of obligation and that this is now being reflected by some leaders in government. The next 30 years will be a time of real change and leaders of the future must back up their words by actions.

Lesley Morisetti of Economics Research Associates chaired a session on brand management which included dynamic presentations from Chris Scurrah of Merlin Entertainments, Johnny Cosgrove of the Guinness Storehouse and Dr Stephan Hering-Hagenbeck of Tierpark Hagenbeck.

Chris Scurrah covered the developments at Merlin since the backing by Blackstone outlining the growth strategy, including both organic and acquisitive growth, strongly correlated to brand management and brand evolution. Merlin has developed, in a very short period, to become the largest leisure group in Europe and second in the world after Disney. The growth from vision to leadership was most impressive.

Johnny Cosgrove gave an insightful presentation on the Guinness Storehouse from the early struggles to develop the vision, through to being one of the most successful branded attractions in Europe. Guinness Storehouse is seen as an extension to marketing, but is fully focussed on emotionally engaging the customer. Johnny also described the changes that have been made to empower the employees at the Storehouse to provide close customer contact. Guinness aims to celebrate its distinctiveness through emotional engagement with its customers. The business model developed by the Storehouse provided funds for re-investment, retains board loyalty (ie it is not seen as a cost centre) and guarantees the future of the Storehouse.

Dr Stephan Hering-Hagenbeck provided a brief history of the only private zoo in Germany and of the challenges associated with maintaining this independence. The presentation of the new tropical aquarium touched on the issues of social responsibility and environmental impact that have become an essential part of the zoo re-inventing itself as a "must see" place. Tierpark Hagenbeck has been a leader in the zoo industry and was the first to offer night-time safaris and continues its leadership position through the use of both private and corporate events.

The first day was wrapped up with an interactive session chaired by Roger Currie of Aqua Leisure International and lead by Linda Caller of Thought Agents Ltd which explored the Key Trends affecting the leisure industry through a brainstorming session. This provided an opportunity for delegates to build on the presentations and discussions earlier in the day to define factors which are likely to affect the industry into the future.

The key trends were identified as:

- * Nothing is new - different perspectives are required.
- * Authenticity (now a critical success factor)
- * Personalised Experience (will become increasingly important)
- * Eco- systems (obligation)
- * Clear (business) Vision
- * Sustainability (obligation)
- * Change Velocity Awareness (rate of change continues to increase)
- * Corporate Social Responsibilities (obligation)
- * Leaders not Followers (cannot afford to stand still)
- * Urbanisation of Leisure (becoming an important sector)
- * Overcoming false sustainability (words are not enough)
- * Collaboration required between competitors on certain issues (many industry common issues which need industry wide discussion at regional, national and international levels).
- * Collaboration required between customers and suppliers (to maximise experience quality, whilst minimising lifetime costs)
- * Visitor satisfaction measures (to know and understand the customer)
- * Does higher quality also have to come at higher costs
- * Leisure time saturation (working hours unlikely to go lower with increasing competition for leisure activities)

The evening was rounded out with TEA Mixer on a 2 hour cruise on Lake Como.

Technology in Attractions

Kevin Murphy and Blair Parkin gave a lively and very informative session on the latest technical developments due to impact on our industry. They covered the relentless pace of mobile communication technology, including the latest barcodes which enable your mobile phone's camera to capture in a split second all the details and contact information from a billboard or poster as you walk or drive by. A couple of keystrokes later you have the web page and can be buying your tickets on line. New projection and sensing technology is seeing the emergence of quite extraordinary flat surface interactive display on a scale unimaginable a couple of years ago. 3D is the hot new trend in Hollywood. Although visitor attractions have been using the technology for some years, suddenly 3D is due to explode into our cinemas, meaning attractions have to move further ahead of the movie industry.

Blair Parkin of Visual Acuity chaired a session on 3D in which there were presentations by Kevin Murphy of Electrosonics, Phil Streather of Principal Large Format and Staffan Klashed of SCISS, Sweden. Kevin provided an excellent overview of 3D development which confirmed that nothing is new. The first 3D movie was developed and patented in the 1890s by William Friese-Greene and the first commercial 3D movie was launched in Los Angeles in 1922. The first renaissance was in the early 1950s with five 3D movies produced for the Festival of Britain, followed by a Hollywood film in 1952. However costs and quality killed the market until the recent upsurge in 3D that has been championed by IMAX. The number of 3D theatres is expanding rapidly and James Cameron's next movie will only be released in 3D in 2009 and it is expected that there will be more than 5,000 theatres available at that time. Phil Streather has produced many 3D movies for IMAX and is one of the leading authorities. Phil provided a most interesting presentation on how technology is enabling the 3D market to develop. Staffan Klashed provided us with an incredible presentation on how 3D is being developed and used in astronomy and we were taken on a tour of the universe through 14 billion light years. 3D is being used in many other applications, including medical and military and, as the technology improves, it will open up opportunities as yet unimagined.

Bart Dohmen of BRC Imagination Arts chaired a session on attractions that are setting the future that included Michele Lanzinger of the Natural History and Science Museum, Trento, Italy and the developments at PortAventura, Spain. Trento is a small museum by national standards; nevertheless it is the third most visited museum in Italy. The museum has focussed on interactivity and involvement with its visitors. The approach has resulted in taking the museum out to the people with interactive days in the city - to show that science and natural history can be fun and is related to every day life. The museum's success is reflected in the development of a new museum which is under construction as part of an urban regeneration and will open in 2009? The museum remains faithful to its core activities in research and education, but also has a strong focus on environmental topics to enrich and keep the museum up to date. David Vatcher presented the developments at PortAventura on behalf of Vicenç Veses Development Director. The presentation covered the development from theme park to major resort with the aim of achieving 6 million guests which will make PortAventura one of the leading international resorts in Europe. The developments have been driven with strong support from shareholders, emotional engagement with guests and partnerships with local and national governments through a strong commitment to corporate and social responsibilities and environmental issues. One of the major challenges has been developing an international business whilst maintaining appeal to the local market and culture.

Steve Simmons chaired the final session with Silke Petzold of Wenzel Consulting providing a summary of projects that are in progress, or planned over the next 5 years. This showed that the industry is healthy and that the Middle East and Asia will become core areas of development over the next 5-10 years.

This year's conference had a wealth of presentations associated with change and environmental and social issues that are starting to have an impact on our business. Authenticity and Emotional Engagement were words that appeared in many presentations. With customers becoming more savvy, attractions of the future must appeal as a "must do" event. Operators need to develop the skills and systems to really engage with the guests in a meaningful and emotional way so that the needs and expectations can be met.

It was a thought-provoking TiLE that dealt with many issues that have, perhaps, just been given lip service in the past.

PHOTOS FROM THE EVENT: