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# 'From the spatial to the digital domain': a need for hotelier reconfiguration?

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**Abstract**

Within Scotland there is shift in the mode of technology being used to find accommodation, from the touring car to the online search engine. This appears to be also associated with a shift in tourist attitudes and behaviour, such as value for money, authenticity and shorter trips. The evidence supporting this shift is grounded in the mapping of established Scottish hoteliers, official Scottish tourism statistics and recent changes within the serviced accommodation stock in Edinburgh. The implications for the established Scottish hotelier is that they should reconfigure themselves to reflect this configuration of shift in which technology has a major role; with the danger of not being found, and, if found, of not being chosen as the accommodation of choice. This paper's contribution is to present an unique analysis of the hotelier based upon the spatial mapping of Scottish hoteliers within the context of shifting tourist attitudes and behaviour.


Keywords: Scottish tourism, tourism trends, online technologies, touring behaviour, spatiality.

## 1    INTRODUCTION

"Location Location Location" are declared by practitioners to be the three most important factors for the success of a tourism related business (Baum & Mezais, 1992; Bull, 1994). Indeed, studies affirm this rhetorical claim of its importance (Bull, 1994; Lockyer, 2002 Urtasun & Gutierrez, 2005). Location is likely to be viewed as a position within a geographical or spatial domain, which a tourism product provider will develop and a tourist somehow needs to find. However, this paper argues, using the case of Scotland to illustrate, that location is also associated with a new digital domain, within which there is also the need for the need for positioning, development and being found (Dickinger, 2011; Pan et al, 2011). Indeed, this is part of a more complex dynamic involving changing tourist attitudes and behaviour as well as innovative responses or initiatives by providers, which includes the specific group of providers which are the focus here, serviced accommodation provider (hotelier[1]). Moreover, these changes have implications for the established traditional hotelier and whether they need to reconfigure themselves in order to survive in a changing competitive environment.

Location is important as it shapes tourism movements within the locality (Shoval & Cohen-Hattab, 2011) for reasons of proximity and convenience (Baum & Mezais, 1992). Moreover, location if

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[1] For brevity, the serviced accommodation provider will be referred to, irrespective of accommodation type (e.g. bed and breakfast) for the remainder of this paper a hotelier

viewed as attractive to tourists, can lead to tourism product providers (e.g. accommodation) establishing a presence at an advantageous position to be easily found in order to serve these transient tourists. Some locations develop their tourism product offering more than others (Pearce & Grimmeau (1985). Indeed, a complex dynamic operates in any given location, which results in changes to a location's profile over time. To illustrate this, Ashworth (1989) explained that the complex dynamics of hotel positioning within historic cities over time was due to whether hotels are already historically established ('historic continuity'), increasing land values, restrictions on central access, changing planning controls, the need for accommodation facilities redevelopment and opportunities to locate, though conclude that there are more possible variables. Shoval & Cohen-Hattab (2001) affirmed Ashworth's model in their study of changes in the spatial distribution of tourism accommodation in Jerusalem between 1850 and 2000, adding the variables of political upheaval and the social-cultural differences of different ethnic groups. Indeed, the recognition of these variables highlights the importance of contextual factors which operate locally, regionally and nationally (e.g. government policies and initiatives).

On aspect of the positioning of providers within a location, particularly urban areas, is that of the co-location of providers with the potential for localised competition (Carrol, 1985; Baum & Mezais, 1992). This introduces a complex dynamic involving the interplay between the different providers. Carroll (1985) distinguishes between the larger 'generalist' organisation and the smaller 'specialists' who survive by virtue of their differentiation in the face of localised concentration of organisations. Baum & Mezais (1992) suggest that differentiation reduces competitive effects, with advantages accruing to larger operators due to generalisations (standardisation) and to smaller operators through specialisms (niches), with further differentiation distinguishing between the economy and luxury hotels. Hotels positioned midway between these polar positions find themselves in an inferior position related to price, uniqueness and niche targeting (Baum & Mezais, 1992).

The distinction between the larger 'generalist' organisation and the smaller 'specialists' perhaps resonates with the newer forms of service accommodation that have been appearing over the last few decades in the UK. First is the budget hotel, which offers a basic but 'clean' standardised offering at low price. Operated by branded chains, they are able to offer low prices due to the limited range of facilities and services offered, their strategic location and their inexpensive modular construction (Senior & Morphew, 1993). The budget hotel might be viewed as a 'generalist' organisation.

The second is the boutique hotel. They are described as hotels that "feature tiny rooms with minimalist decor and spartan amenities but are perceived to have such a superabundance of style that the well-heeled willingly pay through the nose for a night's lodging" (Binkley, 1999) "specialist accommodation" (Mcintosh & Siggs, 2005: 76), "about difference, design, style, experience and emotionalization" (Wolff quoting Claus Sendlinger, 2003) and "contemporary, design-led hotels with

up to 100 bedrooms, which offer unique levels of personalised service and high-tech facilities" (Aggett, 2007: 170). Rogerson (2010) comments:

> The emergence of the boutique hotel is acknowledged to be an innovative response to the standardization and commoditization of the hotel and of international hotel developments occurring during the 1970s and 1980s (Rogerson, 2010: 427).

However, the variety of forms available makes its definition difficult: However, "A boutique hotel is something like art, hard to define, but you know one when you see it" (van Hartesvelt, 2006). Nevertheless, irrespective of how boutique hotels are viewed, they are clearly specialists, but this invites the question of whether they can be branded (Watkins & Stoessel, 2010).

The implications of the emergence of these new forms of accommodation is the impact upon the established traditional operators and whether they respond to this. Senior & Morphew (1993) suggests that these traditional operators need to segment their market, differentiate their offering and improve service quality. Whist intuitively this makes sense, there are other influences that need to be considered, one of which is the emergence of digital technologies creating the online experience. Indeed, this draws attention to the contextual domain within which local tourism exists and the challenges that arise from more general contextual influences.

Globally, tourism is in transition. Not only has it emerged to become one of the more significant industries globally, ranked 4th in terms of international exports (ITC, 2010). Emerging economies have a growing significance as both a source and destination of tourists (UNWTO, 2010). The tourist is more differentiating in terms of experience leading to diversification in tourism product offering (Yeoman et al, 2006). Underpinning these developments have been the increased accessibility both to information about destinations as well as to the destinations themselves, facilitated by developments in technologies for transportation and communication.

Within Scotland, where tourism can be described as an established industry, these more recent changes in tourist attitudes and behaviour have not gone unnoticed. A number of studies have been published which have attempted to draw attention to these changes (e.g. Yeoman, 2005; Yeoman et al, 2006; Yeoman et al, 2009). Indeed, several publications detailing this for a practitioner audience have been produced by Tourism Intelligence Scotland (TIS) (TIS, 2007, 2009).

Whilst these changes in tourist attitudes and behaviour shed a partial light on the dynamics of the ongoing reconfiguration of the complex that characterises tourism, this attention focuses upon the demand (consumer) side of the complex rather than the supply (producer) side. Indeed, one aspect which appears to receive little attention is the impact of these changes upon the existing tourism product and, in particular, one important group of producer this being the hotelier.

Scottish tourism has, for much of the twentieth century, been characterised by people visiting resorts or touring, spending around two weeks. Whilst resorts have required booking ahead, touring has involved finding accommodation by passing by. More recently there has been a change in the pattern of tourist behaviour in favour of short trips and value for money. This has elevated the popularity of urban destinations, which in turn increases the attraction of urban destinations to the corporate sector, who provide commoditised 'budget' accommodation offerings and a new accommodation model. However, the increasing market share of the corporate sector is detrimental to established local businesses within these urban areas, which leads to issues regarding how these local businesses can compete. Indeed, this argument is applicable to businesses in rural locations as tourists, particularly overseas tourists concentrate in the cities. It is argued here that a different accommodation model is required which differentiates and provides different types of experiences (e.g. on-line touring, authenticity). This model, whilst applicable to peripherally located urban hoteliers, is relevant to rurally located hoteliers, whose dependence upon passing trade is diminishing.

The aim of this paper is to examine the implications for hoteliers of the transition which Scottish tourism is experiencing as a consequence of the uptake of new forms of technologies, changes in tourist attitudes and behaviour and new hotelier offerings (e.g. budget, boutique). The core of the argument is that the changing manner of 'being found' is symptomatic of an underlying shift in what tourists are looking for and the manner of how tourists find the hotelier, from the physical domain (by passing by) to the digital domain (by searching online). This has implications for how hoteliers should configure themselves. Four models are presented of ideal types of hoteliers; two contrasting models which reflect the more traditional view of the hotelier and two contrasting models that profile the new hotelier, this providing a reference point for the reconfiguration of the traditional.

The discussion presented here is part of a project which commenced in 2003. This examined the online practices of Scottish serviced accommodation providers (hoteliers) within the context of Scottish Government activity to support tourism. Data collection commenced in 2005 with the compilation of a database of the population of hoteliers for all of Scotland, using a variety of both online and offline sources. This enabled the hotel inventory for Scotland to be profiled. Additional data was complied for 2003 and 2007 of hoteliers promoting themselves through the national agency VisitScotland, this providing a temporal perspective over five years. Spatial visualisations of the 2005 data-set were created using ArcGIS software, which allows the generation of customised maps. The interpretation presented here was first drafted in 2007.

## 2    BEING FOUND: PAST, PRESENT AND POSSIBLE IMPLICATIONS OF CHANGE

### 2.1    *A historical perspective*

A brief historical reflection reveals the changing nature of tourism over the last three centuries, particularly at a local level. The Scottish tourism industry emerged as a distinctive activity in the latter part of the 18th Century (Durie, 2003). Indeed, the long history of Scottish tourism has been characterised by a range of developments over time. These have allowed various authors to distinguish different phases (Seaton, 1998), reflecting specific configurations of developments particular to the period. Perhaps the key characteristic underlying these developments is improved accessibility and the development of different modes of transport. With growth in tourism, word-of-mouth, travel guides and newspaper articles supplanted the early "explorer" travel accounts to raise awareness of Scottish localities. Whilst royal patronage (e.g. Queen Victoria) popularised Highland culture during the 19th Century (Seaton, 1998), the steamship and railway contributed to the growth in tourism throughout the 19th Century. This gave rise to the emergence of resorts in many parts of accessible Scotland. These resorts fed of daily excursionists, the longer stay 'residencies' of the wealthier classes and the granting of trade holidays to the working-classes. As localities developed, through the exploitation of fashions (e.g. water cures) and the 'construction' of attractions (e.g. golf courses and dance halls), competition between them intensified. Towards the end of the 19th Century, town councils realised the importance of promoting their location, previously done by private sector interests, resulting in the setting up of "publicity committees" (Durie, 2003: 131).

Perhaps a turning point was the introduction of the bicycle in the 1870s and the motorcar in the 1890s (Durie, 2003). Rather than being confined to the beaten track and specific 'destinations', people could access hitherto less known areas throughout Scotland. The tourist 'toured', stopping off for one or more nights here and there. A more recent study of car use in a Scottish National Park (Connell & Page, 2008) revealed that different car-based touring patterns can be discerned. Duffield & Coppock (1977, 'xx') reports that in 1973, "half the visits to the Highlands and Islands were touring holidays" with 'private cars' being the dominant mode of transport. Between May to October around 80% of all holiday trips in the Highlands and Islands were "main holidays".  Furthermore, over 50% of trips in the Highlands and Islands lasted 14 nights or more during June to August, though not all this time was necessarily spent within the Highlands and Islands (Duffield & Coppock, 1977). Perhaps unsurprisingly, two important sources of information about accommodation in the early 1970s were the guides of the two main automobile associations, The Royal Automobile Club (RAC) and the Automobile association (AA) (Burkart & Medlik, 1974). Whilst no statistics have been found for earlier dates, by 1973, the volume of tourism in Scotland, in terms of overnight visits, was significant (Table 1), suggesting a significant need for overnight accommodation.

| 1973 | trip (million) | nights (million) |
|---|---|---|
| **UK** | 12.50 | 70 |
| **overseas** | 0.75 | 10 |
| **TOTAL** | 13.25 | 80 |

Table 1     Volume of tourism in Scotland for 1973 (from STB, 1982).

However, in part owing to the short duration of the tourist 'season' (traditionally June to September), one of the less pleasant aspects of Scottish tourism throughout its history including the present, has been the not uncommon discovery that there is a shortage of accommodation, particularly in popular locations. This exposes the majority of tourists (i.e. those who do not forward-book a room), to the potential experience of an uncomfortable night. Whilst new hotels have been built, particularly in resorts, the excess demand has continuously offered opportunities for people to open up their house to the overnight stay, particularly alongside roadside locations. This has elevated the importance of location for these lodging houses, so that they can be 'found'.

## 2.2     The legacy of 'being found'

The legacy of this age is the manner of distribution of serviced accommodation throughout Scotland. The population of serviced accommodation in Scotland for 2005 was determined to consist of 6.522 sites, with a composition dominated by bed and breakfasts (B&Bs) and guest houses[2] (Table 2). Only 6% of these hoteliers have 50 or more rooms, whilst 42% have 2 or 3 room, with only 2% offering one room (Harwood, 2007). The corporate sector (a company holding more than one site) comprises less than 6% (375 sites) of the population, with 10 organisations holding 55% of this (Harwood, 2007).

| B&B | Campus | Guest House | Hotel | Inn | International Resort Hotel | Lodge | Restaurant | Small Hotel | TOTAL |
|---|---|---|---|---|---|---|---|---|---|
| 2,643 | 17 | 1,475 | 1,363 | 173 | 4 | 85 | 29 | 733 | 6,522 |

Table 2     The population of hoteliers in Scotland for 2005 (from Harwood, 2007).

The mapping of these sites using postcodes reveals the pattern of hotelier spatial distribution (Figure 1). The distinction is made between end destinations (e.g. resorts) with their clusters of accommodation and touring routes with accommodation aligned along these routes. Both attract particular types of accommodation as illustrated visually in Figure 1. The numerous small hoteliers (B&Bs) appear to be aligned along the main roadways of Scotland, whereas guest houses tend to be located in towns. Hotels are distributed throughout Scotland, though cluster in towns and cities.

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[2] For a formal definition of the different types of accommodation providers please refer to that provided by VisitScotland at www.visitscotland.com/quality-assurance/accommodation-types/, last accessed 20th June 2011.

A clearer demonstration is provided in Figure 2, Figure 3 and Figure 4. These diagrams detail the distribution of hoteliers within the City of Edinburgh. Figure 2 reveals visually both linear and cluster patterns. When the main roads are super-imposed on this map (Figure 3), this reveals clustering in the city centre, in the old seaside resort of Portobello and in the Newington area. It also reveals the alignment along the major roads. Indeed a linear pattern linking the centre to Leith marks the main road between the centre and Leith. This pattern perhaps reflects a traditional dependence upon 'passing trade', where, if a tourist likes the locality being driven through, then the tourist will seek out accommodation in that locality, driving past hoteliers and selecting one that appears attractive. If full, then an accommodation provider would pass the tourist on to a friend providing serviced accommodation, perhaps not in such an advantageous position. Hoteliers, where possible, take advantage of their position to capture this passing trade. The presence of a linear alignment of hoteliers is perhaps a trace of a former behaviour, when passing trade was an important means to capture custom.
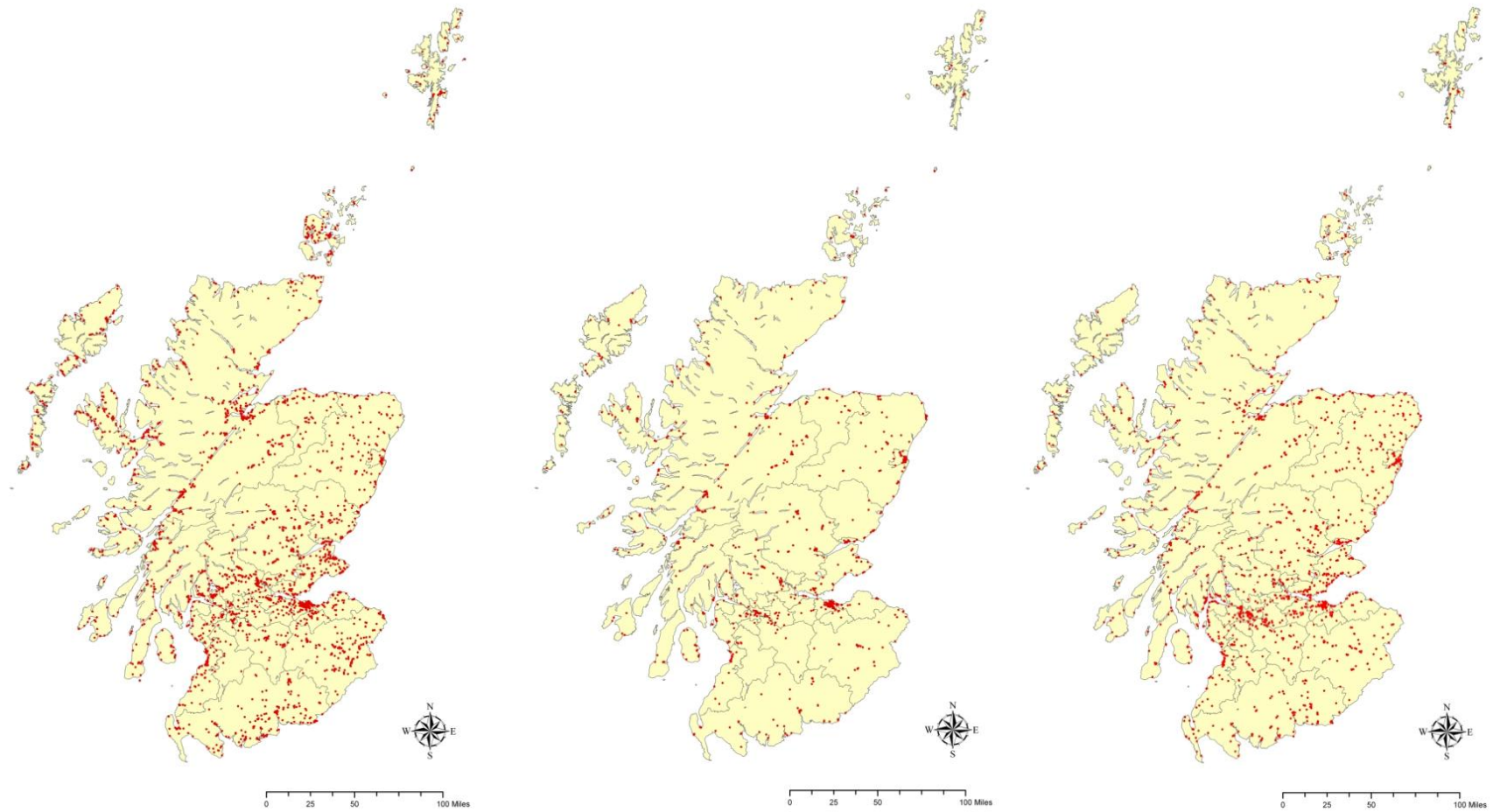
Figure 1     Distribution of    a) B&Bs,    b) Guest Houses and   c) Hotels for 2005.     © Crown Copyright/database right 2007. An Ordnance Survey/EDINA supplied service.
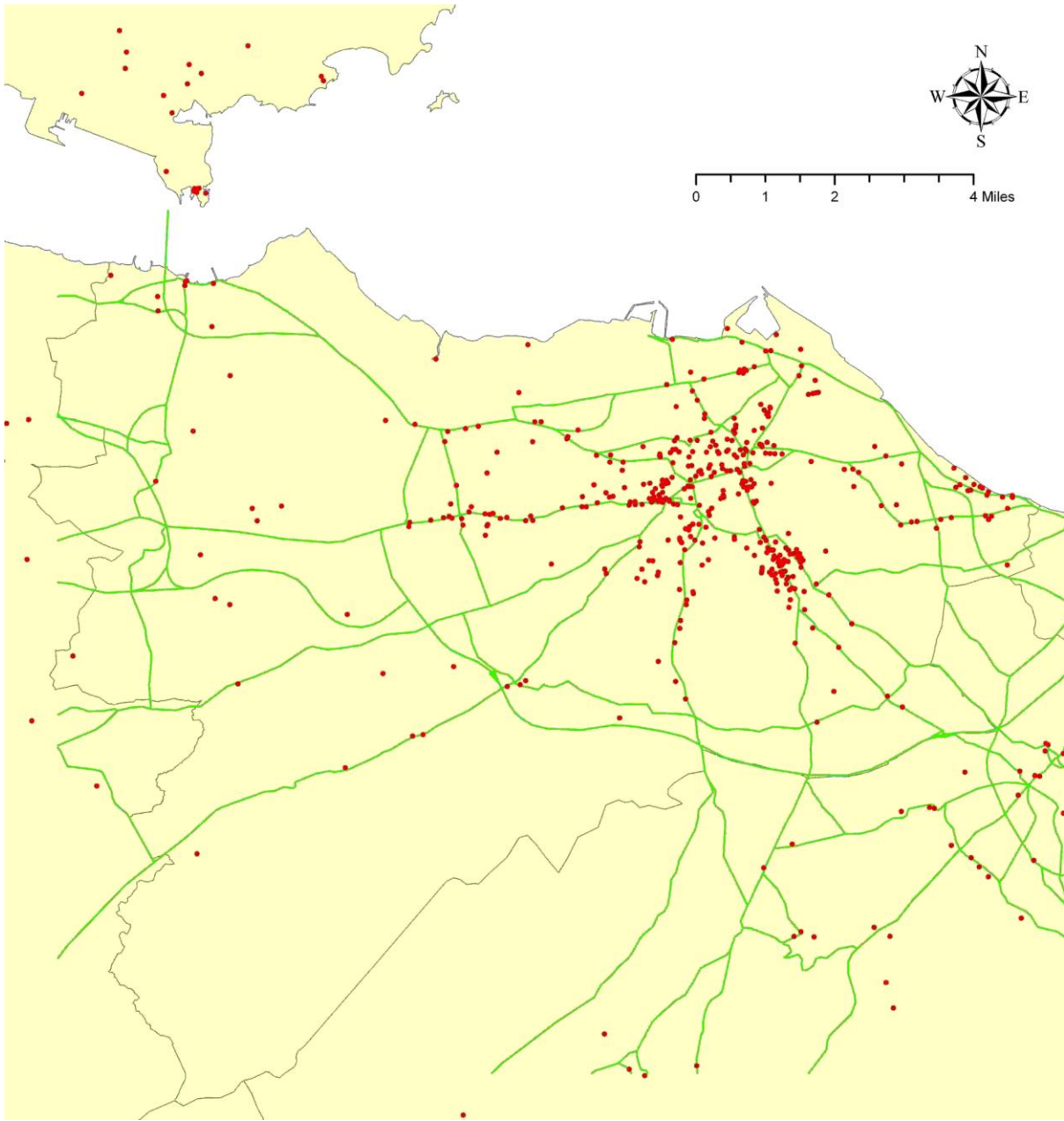
Figure 2     The location of hoteliers in the City of Edinburgh for 2005.     © Crown Copyright/database right 2007. An Ordnance Survey/EDINA supplied service.
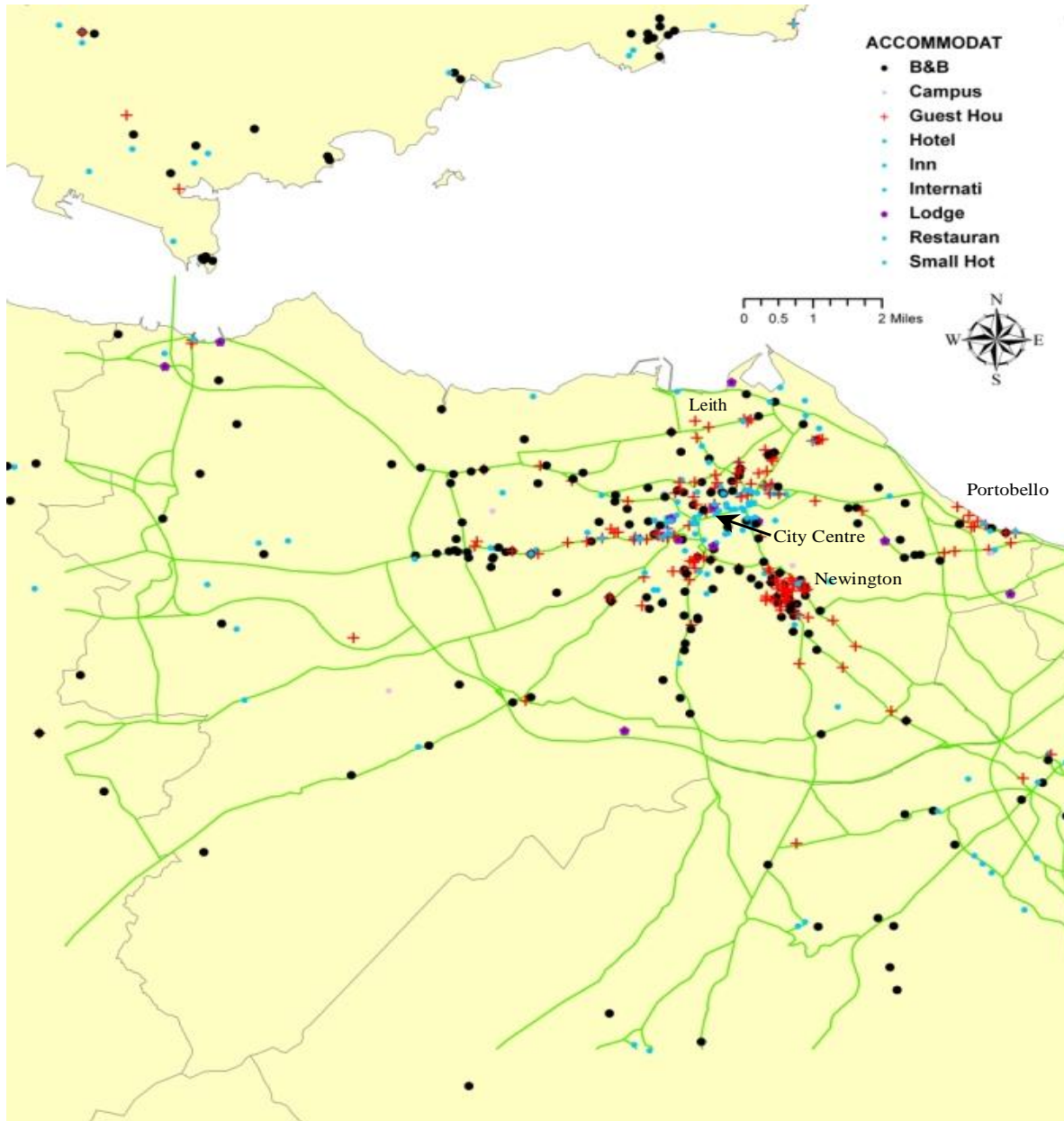
Figure 3    Map of the distribution of hoteliers in the City of Edinburgh for 2005, by type and with main roads superimposed [B&Bs denoted by larger circles, guest houses by crosses and all other forms of accommodation by smaller circles].     © Crown Copyright/database right 2007. An Ordnance Survey/EDINA supplied service.

This depiction however needs to acknowledge the impact of local planning authorities upon location. Prior to 1947 anyone could let out rooms to tourists. The Town and Country Planning (Scotland) Act 1947, together with The Town and Country Planning (Use Classes) (Scotland) Order (1997) established criteria defining whether planning permission was required if letting rooms in domestic properties. Local authorities, who, by the end of the 19th Century, started to recognise the benefits of providing amenities to support the opportunities of tourism (Heeley, 1981), particularly in the resorts, were empowered to set their own policies as to where hoteliers could trade. Edinburgh City Council established planning guidelines in 1987 to take into account local amenities and residents. These attempted to confine new serviced accommodation to the main tourism traffic routes and adjacent areas, though established businesses were primarily unaffected. Nevertheless, from an

accommodation provider's perspective this would not necessarily be a major issue as the need to capture passing trade would imply the desirability of a good location on these main tourism traffic routes.

Examination of the composition of these clusters and alignments in terms of type of accommodation (Figure 3 with an enlargement of the central area presented in Figure 4) reinforces the observations about the patterning of the spatial distribution of hoteliers. Hotels appear to be located predominantly in the centre, though isolated hotels are scattered throughout the locality. Guesthouses appear to dominate in the two other clusters of Newington and Portobello as well as the area to the north of the centre. Bed and breakfasts are more distributed, though appear aligned with major roads. Each portrays a possibly different way of capturing the tourist, perhaps highlighting the distinction between the passing trade of the tourist and those tourists who have pre-chosen their end destination. This suggests two contrasting idealised types or models of hoteliers based upon how "found".
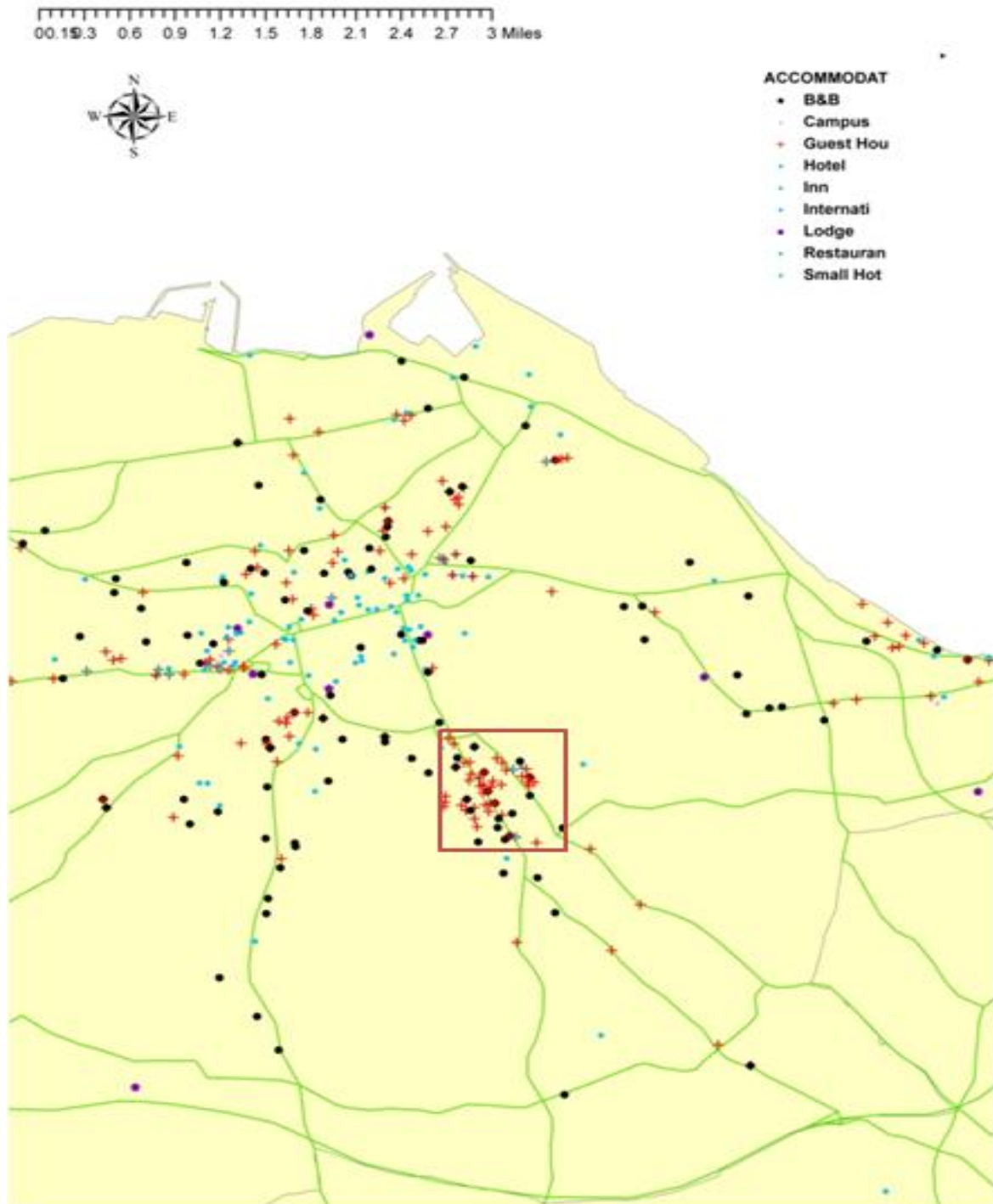
Figure 4    Map of the distribution of hoteliers in the City of Edinburgh for 2005, by type and with main roads superimposed [B&Bs denoted by larger circles, guest houses by crosses and all other forms of accommodation by smaller circles] The square denotes the area presented in Figure 5.    © Crown Copyright/database right 2007. An Ordnance Survey/EDINA supplied service.

The idealised models revealed by the distinction between the tourist travelling to an end-destination and the tourist passing-by is presented in Table 3.

|  | End destination | Touring |
|---|---|---|
| Location of accommodation | Location of interest (e.g. resort, city) | Roadside en-route |
| Type of accommodation | Guest House, Hotel | Bed and Breakfast |
| Congregation of accommodation | Cluster | Isolated |
| Manner of being found | Promotion (e.g. brochure) | Found 'in-transit' |
| Manner of securing accommodation | Pre-booked | Passing or local Tourist Information Centre (TIC) (on the day) |
| Duration of stay | Week, Fortnight | One night |
| Access to accommodation | Train, Other (non-car) | Car |

Table 3        Contrasting idealised models of hoteliers based on how 'found' in the spatial domain

However, it is postulated that this is a traditional view of tourism within Scotland. Instead, it needs to be revised to accommodate current changes within the Scottish tourism industry which are being influenced by global developments, thus acknowledging Scotland's position within the global arena. Moreover, whilst the automobile transformed Scottish tourism in the 20th century, digital technologies are transforming global tourism in the 21st century. However, digital technologies are only one part of the configuration that characterises the new phase into which Scottish tourism is entering within the global arena. Indeed, an examination of these global developments, together with indicators of changes nationally and locally suggests new idealised models.

*2.3    Global developments*

Tourism globally is regarded as "one of the fastest growing economic sectors in the world" (UNWTO, 2008a). Over the period 1995 to 2007 the international industry[3] had grown by an average of over 4% in terms of international tourism arrivals with it growing by 5.6% in 2007 over 2006 (UNWTO, 2008: 1). However, 2008 was marked by falling demand, influenced by "extremely volatile world economy (financial crisis, commodity and oil price rises and sharp exchange rate fluctuations)" (UNWTO, 2009:2). 2009 was described as "one of the toughest years" on account of the A(H1N1) influenza pandemic (UNWTO, 2010). 2010 and the early part of 2011 have highlighted the impact of 'shocks' resulting from natural events (e.g. volcanic ash, earthquake-tsunami) and political / social unrest (e.g. North Africa / Middle East). Nevertheless, as demonstrated by its recovery after 9/11 in 2001, the industry is resilient following shocks (UNTWO, 2010), though tourists "tend to travel closer to home, for shorter periods of time, and seek greater value for money" (UNWTO, 2011b: 7). Despite these disturbances, tourism is viewed as resilient

> Tourism is a resilient sector that tends to show a significant capacity to rebound after a crisis situation, as proven with recent events such as terrorism and natural disasters. Still, in the short term, the sector can be highly impacted by crises situations (UNWTO, 2011c).

Growth is expected to resume, with emerging economies playing an important role (UNWTO, 2011b). The 919 million international arrivals in 2008 is anticipated to grow to achieve the target of 1.6 billion in 2020 (UNWTO, 2010).

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[3] This excludes domestic tourism, i.e. residents holidaying in their own county, which in Scotland's case is significant

The underlying reasons for this sustained growth include an increase in leisure time, greater disposal income, favourable exchange rates and ease of access to an increasing number of international destinations. Not to be overlooked is the growing international corporate presence, shaping destinations through their branded offerings. Thus, destinations find themselves in increasing competition for tourists, creating the challenge of what destinations are to offer as well as how destinations are to be found, whether at national, regional or at local levels.

Developments in Information and Communication Technologies (ICTs) (e.g. online and mobile technologies) provide access to a wealth of information about destinations and thus introduce new possibilities for consideration, amplifying the potential for competition. Moreover, reputations of destinations are in part shaped by the growing role of social media as a medium in which tourist experiences are made available to the global online audience. The challenge for the product provider becomes specific in terms of how to be found online in a manner that differentiates and increases appeal.

Growth disguises an uneven and ever-changing landscape, in which countries jostle to develop and grow their tourism industry within a global arena in which the well-being and development of the source nations for tourists fluctuate. Moreover, whilst these contextual issues are important, there may be an important underlying pattern of change in the profile of the tourist's attitude and behaviour.

2.3.1    Changing consumer profile

Whilst the international or domestic tourist may be customary viewed as coming  from North America or Western Europe, this view is challenged by the increase in numbers of tourists and spend arising from emerging economies, with China ranked 4th in terms of spend, Russia (9th), Saudi Arabia (11th) with Philippines, Turkey and India making a contribution (UNWTO, 2010). The growing affluence of nations, their evolving demographic profiles and the shifting socio-economic profiles of the potential tourist, together with their cultural back-ground and individual interests combine to create a complex view of the potential tourist.

Nevertheless, in their examination of tourism trends, the European Travel Commission (ETC, 2006) use the distinction between time and money, noting the challenge of those who are time-poor (i.e. lack time to do things), but money-rich, thus able to afford short duration experiences. This is in contrast to those who are time-rich (e.g. retired), which offers opportunities for off-season products. Furthermore, the ETC draw attention to the notion of 'experience', whereby the tourist seeks deeper and richer experiences more in alignment with self-concept and expression. Moreover, tourists seek experiences that are authentic rather than staged (see next section for brief discussion). The ETC also recognise the opportunities resulting from the diffusion of new forms of digital and mobile technologies, which include easier access to information as well as enable transactions.

Whilst new forms of technologies are enabling mechanism, the critical issue is the behaviour of the tourist, in particular, the duration of stay:

> One of the most important trends in world tourism over the past decade has been the rise in short-break trips…

(Scottish Parliament, 2002: 2)

However, if technology is the enabler and time is a governing factor, then the reason for the decision for a visit is focuses upon the nature of the experience.

This has invited research which, in the context of Scotland, segments the tourist into a range of profiles, as well as differentiates them according to the experience sought. (TIS, 2009). Whilst activities can be classified in different ways (e.g. sports related (e.g. golfing, , cycling, walking), nature based (fishing, bird watching), event grounded (e.g. wedding) or other (e.g. cultural)) underpinning these is the issue of the experience and its authenticity. Indeed, Tourism Intelligence Scotland (TIS) state that "increasingly however there is a drive for authenticity and an experience that can make you feel or learn something" (TIS, 2007: 5), though, it is unclear whether they are referring specifically to the UK tourist or the global tourist. However, in a subsequent report the TIS state that,

> Whoever the visitors are and wherever they come from, all visitors are looking for good value, good quality and excellent hospitality. They really enjoy 'the authentic Scottish experience' and will quickly be disappointed if they feel that they aren't getting the real thing. (TIS, 2009:6)

Yeoman et al (2006) elaborate upon the notion of the authentic experience:

> As the experience economy matures, authenticity emerges as a driver; authenticity means that consumers centre on the pure experience untainted by copycats. A truly authentic experience is steeped in culture and history and presented in an innovative way (ibid: 187).

Authentic experiences are associated with the 'real' and enduring, not the contrived and fleeting. Moreover, social media is of growing importance for recording tourist experiences, raising awareness of destinations and shaping the reputations of destinations as authentic or enjoyable experiences.

2.3.2    The authentic experience

Whilst it is beyond the scope of this paper to explore the concept of authenticity, which has already received some attention (MacCannell, 1973; Cohen, 1988; Hughes, 1995; Wang, 1999; Resinger & Steiner, 2006; Cole, 2007; Laue, 2010), an interesting insight into the authentic experience is provided by Urry (1990) from the stance of the tourist's or consumer's "gaze". Whilst the tourist enjoys a privileged position, Urry exposes a number of issues, which elevates the status of the tourism provider (producer). He notes that the service consumed or 'experience' is 'spatially fixed' with both consumers and producers in (intimate) proximity (Urry, 1990: 38). It is a spatially localised package or 'construct', which caters to consumer expectations, these expectation in part created through the imagery promoting the locale. The 'experience' includes a 'moment of delivery' which entails engagement or 'emotional work' typified by a smile, and pleasantries (Urry, 1990: 62-63). This personal element (e.g. the satisfaction from "walking into a hotel and seeing a familiar face") is an integral feature of the experience (Urry, 1990: 64). Urry makes the distinction between the collective and the romantic, with the collective placing emphasis upon producer led mass-consumption of a commoditised product, whilst the romantic emphasises personally differentiated consumption of the authentic. However, the notion of authenticity is cast into doubt due to the socially constructed nature of what is experienced in terms of the locale and the moment of delivery. Tourists are instructed about what to gaze upon. Whilst being found is an issue it

sits alongside the offering itself in terms of what is being offered. Indeed, Urry's view draws attention to the distinction between the commoditised tourism product and that which can be construed as authentic.

In drawing attention to the socially constructed nature of what is experienced and contrasting the commoditised with the authentic, Urry exposes arguments presented by MacCannell (1973), Cohen (1988), Hughes (1995) and others about the socially constructed ('staged') aspects of the authentic and the challenge of how 'authenticity' as both a concept and as a recognised experience are to be defined, a challenge that is left to be picked up elsewhere. However, for the purpose of this discussion, authenticity is viewed as the antithesis of the commoditised, and thus as a differentiated offering and personalised experience.

*2.4     A profile of tourism in Scotland in 2009*

Within Scotland, the shift in the pattern of tourist behaviour can be observed in the publicly available statistics of trips made by tourists from both within the UK and overseas. A comparison of the current volume of tourism with that in 1973 (Table 4) reveals that, whilst the number of trips from within the UK to Scotland has not really changed, there has been a substantial reduction in the number of nights spent and thus, the duration of stay is reduced. Whilst the number of international tourists has increased from 1973[4], again the duration of stay has reduced. The short term variation over 2006-9 may be attributed to economic factors (e.g. the credit crisis, exchange rate, fuel prices).

|          |               | 1973  | 2006  | 2007  | 2008  | 2009  |
|----------|---------------|-------|-------|-------|-------|-------|
| **UK**   | **trip** (m*) | 12.5  | 13.28 | 13.2  | 12.15 | 12.47 |
|          | **nights** (m)| 70    | 47.16 | 47.45 | 44.19 | 46.08 |
| **overseas** | **trip** (m) | 0.75 | 2.74  | 2.79  | 2.48  | 2.56  |
|          | **nights** (m)| 10    | 26.38 | 24.54 | 19.34 | 21.91 |
| **TOTAL**| **trip** (m)  | 13.25 | 16.01 | 15.99 | 14.63 | 15.03 |
|          | **nights** (m)| 80    | 73.54 | 71.99 | 63.53 | 67.99 |

Table 4     Volume of tourism in Scotland for 1973 (from "Tourism in Scotland 1981", Scottish Tourist Board, Oct. 1982), 2006, 2007, 2008 and 2009 (from VisitScotland tourism factsheets for years, 2006, 2007, 2008, 2009). Note: whilst data methodologies may have changed over this period, it is assumed that the values are indicative rather than absolute. [*m = million]

2.4.1     The short stay holiday

A more detailed insight this tendency towards shorter stays is presented in Table 5. Whilst this aggregates the different forms of visits, which includes business related visits, though this accounts for less than 20% of all visits, it draws attention to the underlying issue of short stays. Indeed, in 2009, 71% of visits were for holidays with the average length of stay being four nights (VisitScotland, 2009a). However, this aggregated data disguises the inherent variation in the detail. In 2009, the percentage of trip involving stays of three or less nights in the Highlands and Island was only 47%, in contrast to 75% and 76% respectively for Glasgow and Edinburgh (VisitScotland, 2009. This insight is compounded when spend level per night is considered. Table 5 suggests that the level of spend per night is relatively low, particularly if accommodation rates are taken into

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[4] The earliest data to be found is 1973, though there have been methodological changes since then which make a comparison limited. Nevertheless, the comparison presented illustrates the change in pattern argued here.

consideration, this in itself inviting questions about the type of accommodation sought and whether there is a tendency towards lower cost accommodation.

|  |  | 2006 | 2007 | 2008 | 2009 |
|---|---|---|---|---|---|
| **UK** | length of stay (nights) | 3.6 | 3.6 | 3.6 | 3.7 |
|  | spend per night (£) | 58 | 60 | 63.6 | 59.38 |
| **overseas** | length of stay | 9.7 | 8.8 | 7.8 | 8.6 |
|  | spend per night | 55 | 56 | 63.9 | 62.03 |
| **TOTAL** | length of stay | 4.6 | 4.5 | 4.3 | 4.5 |
|  | spend per night | 57 | 58 | 63.7 | 60.23 |

Table 5     Duration of stay and daily spend rate for both UK and overseas visitors to Scotland (from VisitScotland tourism factsheets for years 2006, 2007, 2008, 2009)

Whilst the aggregated data disguises the inherent variation in detail, nevertheless, it is supportive of claims about the significance of short duration stays to Scottish tourism. .

> Scottish tourism has been particularly affected by this trend with figures for 2000 showing that 91% of trips to Scotland were for 7 days or less. This pattern can be part explained by changes in lifestyle over recent years.

> (Scottish Parliament, 2002: 2)

Moreover, the contrast between the percentage of tourists staying for three or less nights in the Highlands and in the two cities of Edinburgh and Glasgow, draws attention to a potentially growing divide between rural areas and Edinburgh-Glasgow, also revealed in the share of Scottish tourists drawn to the cities (Table 6).

2.4.2     <u>The rise of the city</u>

The emergence of Edinburgh as a major destination reflects a configuration of general developments: the attraction of 'short-break' holidays to end-point locations such as cities, their ease of access (train-plane), centrally located, affordable (price per night) and commoditised, 'branded' accommodation and the offering of a variety of events, activities and attractions. This reflects the recognised substantial growth in city tourism since the 1980s (Scottish Parliament, 2002). In 2009, over 30% of all bed-nights in Scotland were spent in the cities of Edinburgh and Glasgow (Table 6).

| 2009 | visitor trips | | visitor spend (£m) | |
|---|---|---|---|---|
|  | Overseas | domestic | overseas | domestic |
| Scotland | 2,540,000 | 12,460,000 | £1,369 | £2,736 |
| Edinburgh | 1,280,000 | 2,140,000 | £438 | £526 |
| Glasgow | 670,000 | 1,630,000 | £222 | £378 |
| City share of total (%) | 77% | 30% | 48% | 33% |

Table 6     The attraction of the two cities, Edinburgh & Glasgow to visitors in terms of trips and spend (from VisitScotland, 2009a)

The audit of Edinburgh's stock of serviced accommodation in 2005 revealed 533 sites offering 29 thousand bed spaces (Table 7). B&Bs and guest houses comprised 73% of sites, though only 17% of the bed spaces, highlighting the importance of the Edinburgh's tourism sector to the smaller hotelier but questioning the importance of the smaller hotelier to Edinburgh. Moreover, an audit in 2006 of accommodation in Edinburgh and Lothians that was commissioned by a variety of public sector organisations, including the City of Edinburgh

Council, suggested a need for an additional accommodation which included 3,000 rooms of three, four and five star hotel quality, as well as 670 rooms of three and four star guest house / B&B (Tourism Resources Company, 2006).

| Council Area | Accommodation type | Number of sites | Number of bed spaces | Number of rooms |
|---|---|---|---|---|
| Edinburgh, City of | B&B | 124 | 735 | 346 |
| | Campus | 5 | 5,770 | 3,421 |
| | Guest House | 265 | 4,121 | 1,944 |
| | Hotel | 89 | 15,998 | 7,651 |
| | Inn | 3 | 90 | 44 |
| | Lodge | 11 | 1,437 | 685 |
| | Small Hotel | 36 | 908 | 433 |
| Edinburgh, City of Total | | 533 | 29,059 | 14,524 |

Table 7        An audit of serviced accommodation in Edinburgh for 2005 (from Harwood, 2007: table 63)

The opportunity to develop hotel operations within Edinburgh by the corporate sector, irrespective of the reasons, was captured in a comment by a hotelier who was a member of an Edinburgh focused Tourism organisation,

> new build hotels opening up, by conversions of existing buildings in the city centre into accommodation.. every hole in the ground in the city is getting turned into an hotel.

(Hotelier, 2007)

Two classes of serviced accommodation development could be discerned. The first related to the 'budget' sector, whilst the other could be described as 'boutique'.

The two leading providers of 'budget' accommodation in Scotland are Premier Inn and Travelodge. In 2005, Premier Inn had four hotels within the city boundaries. By the 1st April 2011, it had opened only one new hotel, this opening in March 2011 near the airport. In contrast, in 2005, Travelodge had three properties in the Edinburgh area, one located in the centre with the other two adjacent to the bypass. Over the period 2007 to 2010 it opened seven hotels in central Edinburgh locations and one near the airport, increasing stock by around 690 rooms[5]. Four of these 'new' hotels were acquisitions of existing hotels. On the 1st April 2011, it was advertising rates as low a £19 per room per night. In August 2009, a company press release revealed that Travelodge "is determined to find even more sites [in Edinburgh] in the coming months and years" (Travelodge, 2010[6]). Another two international providers have also established a low cost presence in Scotland. In 2005, Accor had five properties, two of which were in Edinburgh. It opened a new property on the outskirts of Edinburgh in 2008. Easyhotel opened its first hotel in Scotland in Edinburgh offering rooms from £25 per room per night (Easyhotel, 2011).

However, the other class of hotel, the 'boutique', was also establishing itself. Whilst the definition of a 'boutique' hotel is open to debate, it is perhaps characterised by offering a more unique experience as demonstrated by how hoteliers promote their offering (e.g. "an exhilarating sensory experience", Hotel Missoni,

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[5] Room stock calculation based upon numbers of rooms revealed in news reports or promotional websites.

[6] Travelodge (2010) *Travelodge Retains Its Crown As The Biggest Hotel Brand In Edinburgh*. Travelodge Press Release, 19th Aug 2010. [www2.travelodge.co.uk/press_releases/press_release.php?id=394,  accessed 2nd April 2011]

www.hotelmissoni.com; "experience worldly wonders alongside traditional Scottish charm", Le Monde, www.lemondehotel.co.uk). Whilst it would be difficult to establish which of the existing stock of serviced accommodation in 2005 could be classified as 'boutique', a search for properties in the centre of Edinburgh (post codes EH1 [Old Town] and EH2 [New Town]) revealed that, amongst the hotel openings since the study of 2005, were those listed in Table 8. Moreover, it was reported that on the 31st December 2009, that planning consent had been granted for eight new hotels comprising around 1500 rooms (CofEC, 2010). The room rates presented, which are towards the lower end, are perhaps indicative of the quality of accommodation, but are significantly higher than the budget accommodation as well as stretching the average spend (~£60) per night of a visitor (Table 5).

| Date | Hotel Name | Corporate Name (home country) | Accommodation ('as described on their websites') | Room Rate (B&B) (website search on 2nd April 2011 for off-season quote six months hence)* |
|---|---|---|---|---|
| Feb. 2006 | Le Monde | n.a | 18 en-suite | From £135 |
| Mar. 2006 | TIGERLILLY | Montpeliers (Edinburgh) | 27 bedrooms / 6 suites | From £180 |
| Jan. 2008 (i) | Holiday Inn Express Edinburgh – Royal Mile | InterContinental Hotels Group (England) | 78 'fully air conditioned guestrooms' | From £86 |
| Nov. 2008 | Hawke + Hunter | n.a. | 3 'designer rooms' | From £75 |
| Dec. 2008 | Hotel du Vin & Bistro | Malmaison &Hotel du Vin (England) | ? | From £140 (single) |
| Mar. 2009 | Apex Waterloo Place Hotel | Apex Hotels (Edinburgh) | 187 rooms | From £93 |
| Jun. 2009 | Hotel Missoni | Rezidor (Belgium) | 136 rooms & suites | From £160 |
| Nov. 2009 | Fraser Suites Edinburgh | Frasers Hospitality (Singapore) | 75 'luxurious and contemporary' rooms and suites | From £185 |
| Apr. 2010 (i) | 20 Albany Street | n.a. | 3 suites | From £119 (double) |

Table 8    An indicative list of hotel openings since the study of 2005 (*prices are only indicative of lower rates though may be lower if discounted) (data collated from hotel websites) (n.a.: not available) (e. inferred date from TripAdvisor reviewer comments).

In both cases, the pattern of development is city centre with exceptions related to strategic locations in peripheral locations (e.g. by-pass junctions and the airport). Moreover, each hotel can be found online, with most offering an online booking facility.

2.4.3    The threat

The implication of this for hoteliers is that point-to-point travellers (e.g. overseas tourists) are more likely to seek central locations for accommodation. Furthermore the growth in business tourism perhaps reinforces this point-to-point behaviour. If tourists are tending to congregate in central locations this suggests that peripheral city locations are under threat. Indeed, this situation is perhaps summed in the following comment

> I believe there is no future for a B&B operation in the mainstream. The B&B operation is under extreme competitive pressure by low cost serviced accommodation – the Travel Inns, Travelodges, Holiday Inn Expresses, who can sell consistent product and of generally a higher standard at generally at least the same price, sometimes lower than you can get in a B&B... so why stay in a B&B in a peripheral location which is a lowly quality and lower consistency and no branding. There will always be a place for a high quality privately owned guest house accommodation but its going to be niche, it's not going to be mainstream... it's going to be high quality, personal service... the mid-market low cost B&B has no future in cities and through time these will revert back to private accommodation.
>
> (Hotelier, 2007)

There is anecdotal evidence that this is happening, with the former resort of Portobello being an example of a tourism locality within the periphery of the city of Edinburgh in decline. Indeed, the headline in the local

Evening News, 2<sup>nd</sup> Feb. 2011 (Blackley, 2011), reveals disquiet about the proliferation of cheap forms of accommodation and the threat to the established businesses, with some existing hoteliers attempting to sell. Indeed, an online 'Google' search on the 4<sup>th</sup> April 2011 for serviced accommodation offered for sale revealed 17 properties, comprising of three B&Bs, seven guest houses and seven hotels. Three were located in the former resort of Portobello area and seven in the Newington area (Figure 5), with the rest distributed throughout Edinburgh. Whilst retirement can be sited for some of these disposals, the question arises of how significant is the impact of new hotels. The new Travelodge at Cameron Toll (Figure 5) in the Newington area is ideally positioned at a major junction to capture incoming traffic before the traffic travels along the main road into Edinburgh (A702). It has 115 rooms, offers free parking, is close to a shopping mall and is on a bus route. Moreover, using Premier Inn as a benchmark, which claims that 60% of its bookings are online (Premier Inn, 2011), then how significant will forward booking be for this hotel? Thus, it questioned whether it is a coincidence that six serviced accommodation providers, which are located on or close to the A702, are up for sale, including two hotels, one of which is relatively close.



Figure 5    Properties for sale in the cluster of hotels and guest houses within the Newington area (see Figure 3 for location). (The diamond locates the new budget hotel, whilst the stars represent serviced accommodation sites for sale on the 4<sup>th</sup> April 2011).

This elevates the argument for how properties distinguish themselves in such a way as to be found and attract attention. Moreover, if tourists are shifting towards central city locations or point-destinations, then the threat extends beyond peripheral city locations to rural locations. This is exacerbated with the assumed decline in the traditional touring holiday and 'passing-trade' and a correspondingly assumed move towards planned trips and forward booking. This concern has seen expression at a Parliamentary level and how tourists can be 'dispersed' to rural areas.

> Throughout the inquiry the Committee heard evidence on the importance of dispersal in order to ensure tourism growth in all areas of Scotland. 'Dispersal' means encouraging tourists travelling to Scotland to visit different areas of the country, from the Highlands and Islands to the Borders, thereby distributing the economic benefits of tourism to all areas of Scotland.
> (Scottish Parliament, 2003: col 183).

The dispersal of overseas tourists is perhaps an increasingly significant issue due to the possible long-term decline in domestic tourism and the corresponding increase in overseas tourists. One of the difficulties with corroborating this is due to methodological changes in the data collection by official sources. Nevertheless, the STB report "Tourism in Scotland 1981" reported that domestic tourists stayed 54-70 million nights over the

period 1973 to 1981, with the number declining over time. The corresponding number of nights for overseas tourists ranged from 10 to 13.5 million nights. These figures contrast with the 46 million nights and 22 million nights respectively for domestic and overseas tourists in 2009 (Table 4). Support for the argument that there is long-term decline in domestic bed-nights is perhaps reflected in the shift away from the long-stay and touring holiday in Scotland, towards the short-break (Scottish Executive, 2006), against a backdrop of strong competition from low cost and accessible overseas locations. Furthermore, travel modes and, hence, access to city locations, differs from rural locations. With the shift to end-destinations using modes of transport other than by car then this exacerbates the issue of dispersal and presents the dilemma of how access issues are overcome. To further undermine this issue of dispersal, specific rural locations are perhaps being lost, as bypass roads navigate around towns and villages and allow faster travel and encourage more point-to-point journeys with fewer stop-offs. Thus, the importance of location to capture passing trade is being challenged by the declining importance of these traditional through-routes. Traditional capture points become a legacy of a by-gone age with occupancy declining over time and leading to a reduction in accommodation stock. The challenge facing hoteliers is no longer how to capture passing trade, but how to get trade to pass through in the first place.

2.4.4    The opportunity

If the traditional tourist passing by is in decline, then this draws attention to the role of the digital domain as a location within which to be found. Moreover, in light of changing tourism attitudes and behaviour, it draws attention to the nature of the offering that attracts the tourist and invites their enquiry. It raises the issue of how tourism product providers, in order to be found, differentiate their offering and promote themselves.

An example of this can be found on the Isle of Skye, a Scottish island about 250 miles to the north-west of Edinburgh. This is sparsely populated location with the main town being Portree. Agriculture and tourism are two important economic activities. The profile of hoteliers is predominantly small business as revealed in the 2005 audit (Table 9). However, a subsequent more rigorous audit for 2007, which examined local online intermediaries, revealed an additional 79 B&Bs and six guest houses. This draws attention to the likelihood that the 2005 audit under-estimates the volume of smaller hoteliers (especially B&Bs) as well that the strategies of these 'invisible' properties to be found are not through the national portals used in the 2005 audit, but through local online intermediaries (e.g. www.isleofskyeaccommodation.com, www.isleofskye.org.uk).

| YEAR | B&B | Guest House | Hotel | Inn | Restaurant | Small Hotel | Total |
|------|-----|-------------|-------|-----|------------|-------------|-------|
| 2005 | 108 | 19 | 17 | 4 | 1 | 21 | 170 |
| 2007 | 163 | 25 | 16 | 3 | 2 | 17 | 226 |

Table 9    An audit of serviced accommodation in Isle of Skye for 2005 and March 2007

The mapping of these properties (Figure 6) reveals their spatial distribution, with concentration around larger settlements (e.g. Portree). However, this distribution also maps out the main road network, with many of these hoteliers positioned in alignment with this network. The expectation of picking up passing trade is denoted by boards advertising accommodation at the side of the roads. Other than during the peak of the season, where accommodation demand exceeds supply, then the challenge of being found is raised.
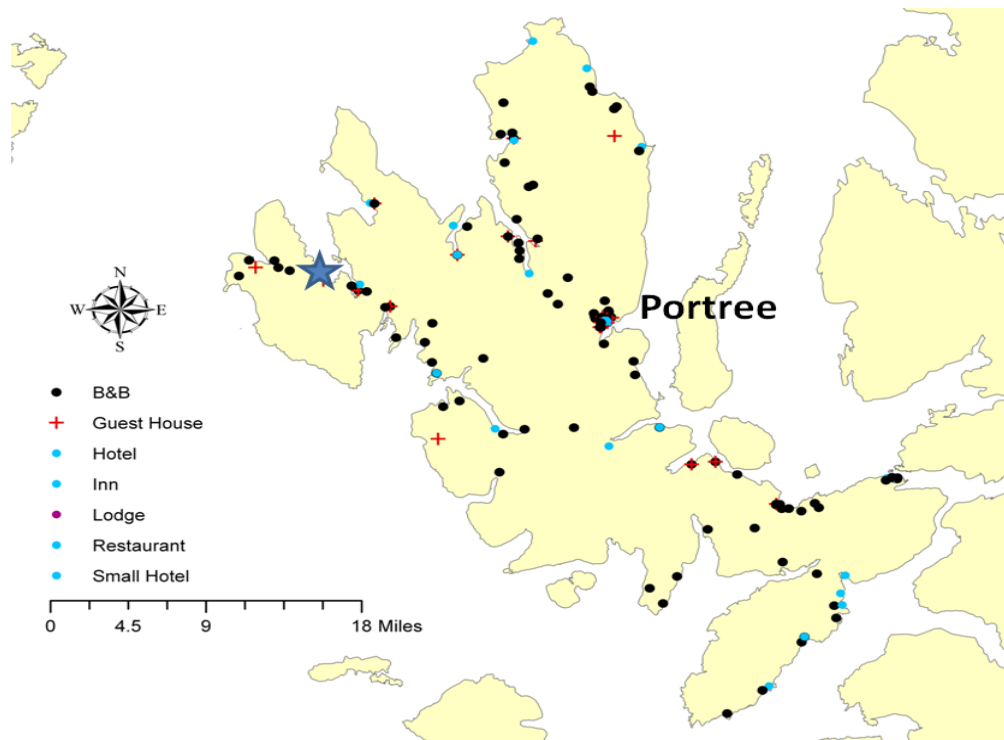
Figure 6      The spatial distribution of hoteliers on the Isle of Sky based on the 2005 audit.   © Crown Copyright/database right 2007. An Ordnance Survey/EDINA supplied service.

This challenge has been taken up by one small family business located in a remote crafting 'township' (Colbost) in the North West of the Isle of Skye, overlooking the open-sea Loch Dunvegan (Figure 7 and denoted by the star in Figure 6). It consists of an award winning restaurant and quality accommodation consisting of six en-suite rooms. Whilst the building hosting the accommodation was built in 1999, the restaurant is housed in an old croft house dating back over 100 years. The restaurant was an existing business when taken over in 1984 by the current owners. Indeed, ten years earlier it had been serving meals and teas, but on a much smaller scale, though during the intervening time it had new owners and had been developed. Since its acquisition the restaurant has received numerous awards, ranking it as one of the best restaurants in Scotland.  The website describes the style as "rustic, in-keeping with tradition and its island seashore location" and offers the tourist "a unique Scottish Destination experience" (www.threechimneys.co.uk). It has a prolific online presence, which includes, in addition to its own website, those of local promotional intermediaries (IsleOfSkye.com), specialist food intermediaries (e.g. Restaurant-Guide.com), social review media (e.g. TripAdvisor), newspapers (e.g. The Telegraph) and national guides (e.g. Undiscovered Scotland). Much of its business is booked ahead of the visit, by telephone or email, with insignificant passing trade. Indeed, the website states that

> We do not offer on-line booking as we prefer, by far, to deal with your enquiries direct and to help you plan your stay here with us on a more personal level. (www.threechimneys.co.uk).

The significance of this example is that it draws attention to the smaller tourism business which is configured to provide a unique or differentiated offering in a remote and relatively isolated location, which is unlikely to be found by the traditional tourist passing by in their car. The physical offering is transformed into a digital domain presence which is readily accessible to the virtual tourist, and through which the tourist can find contact details and book their visit.

Figure 7    A view of Loch Dunvegan with the restaurant and associated buildings. The field in the foreground is part of the neighbouring small Folk Museum (photo taken by author in 2008).


*2.5    Implications – the need for the hotelier to reconfigure*


Against the global backdrop of increasing competition from alternative destinations and changing tourist behaviour, the challenge facing the Scottish tourism industry, specifically hoteliers, is how to respond. Indeed, it appears that corporate sector and innovative small-medium sized businesses are taking the lead in terms of shaping the industry, through the inroads they are making in establishing their presence. There appears to be two generic models. The first offers low price, value for money commoditised accommodation. The other focuses upon authentic experiences. Both are exploiting online technologies to be found. However, there is the danger that the many smaller businesses that comprise the industry, suffer from inertia, are complacent and are reluctance to respond to the changing demands for value or authenticity. Indeed, the implication for the traditional hotelier is to reconsider how to be found as the more customary passing trade declines.

The development of online technologies has created a new "digital" domain for being found. The online tourist travels through the locality via the browser and search engine. This point was brought home to the author when researching a remote rural location in Scotland. A few hours on Google Earth allowed the author to 'fly' over localities at different heights, as well as 'drive' down streets and gaze upon the surrounds. Information about locations was found by typing in the appropriate key words into a search engine.  Impressions were formed from the information presented including reviews from websites such as TripAdvisor.  Just as physical location was important for the tourist driving past, location on a search engine is important for the tourist browsing or searching online. Moreover, these technologies and the act of pre-booking has diminished the importance of physical locations with regard to 'passing through' and 'passing trade', elevating the location as a pre-booked end-point destination. It reflects a shift in the way the tourist tours: from tours in the spatial domain to tours in the digital domain. In doing so, it creates the challenge for hoteliers of how to exploit these online technologies, to be found in this new domain.

Indeed, this translation from physical location to online location introduces an interesting issue. If physical location has become less of an issue from the point of view of the accommodation provider for getting passing trade, then this suggests that the accommodation provider needs to determine how to position online both the locality to attract tourists and the offering to attract the booking. Moreover, since the potential tourist is presented with choice, being found online must be backed up with a product offering which appeals, creating the need to reconfigure the offering in a way that differentiates it online (e.g. low cost value for money or a unique experience). Furthermore, the positioning of properties online is perhaps not easily achieved by individual properties, lending support to the argument for the use of intermediaries or for collective action. Whilst online intermediaries proliferate, they are unlikely to privilege one location over another. An alternative is for local tourism product providers to locally collaborate with each other and establish an online presence which promotes the locality (e.g. HolidayMull, Skye & Lochalsh Marketing Group) (Harwood, 2009)

The preceding analysis suggests that there are two contrasting new idealised models of hoteliers based upon how they are 'found' (Table 10). Whilst these are not necessarily replacements for the traditional models, they reflect the shift from being found in the spatial domain to being found in the digital domain. The fundamental change is a shift away from passing trade towards being found online and booked ahead.

|  | City | Indeterminate |
|---|---|---|
| Location of accommodation | City Centre | Location of specific attraction |
| Type of accommodation | Commoditised Brand or Speciality | Authentic and Quality (but not necessarily graded by the QA scheme) |
| Congregation of accommodation | Cluster | Isolated |
| Manner of being found | ONLINE | |
| Manner of securing accommodation | Pre-booked [online] | Pre-booked [telephone or email] |
| Duration of stay | Several nights | Several nights to a week |
| Access to accommodation | Train-plane | Car |

Table 10    Contrasting idealised models of new style accommodation providers based upon how 'found' in the digital domain

For the city based hotelier, a particular type of tourist (e.g. short-break affluent and time conscious) will seek a short-break stay in an affordable commoditised and branded accommodation, centrally located in a city destination with easy access by train or plane.

In contrast, the indeterminate hotelier can be found anywhere. It may offer a specific service and has proximate locational advantages. It is likely to attract a discerning tourist with a specific interest. There is emphasis upon authenticity and quality, but quality in a manner that does not fit within prescribed quality schemes (e.g. does not offer technology based services such as television). This accommodation is likely to be provided by the smaller provider.

The common denominator for both is being found online. However, whilst online booking may typify the city based hotelier, booking the indeterminate accommodation provider may be by phone or email, with the booking

process perhaps involving a discussion about the visit. Of growing importance is social media and the online record of personal experiences of tourists.

The value of these four different idealised models is that they perhaps highlight issues that the more traditional hotelier needs to be alert to within the changing landscape of Scottish tourism. In view of the importance of tourism to Scotland, it can be argued that these businesses need to be alert to the opportunities offered by online technologies to compensate for the decline in the traditional tourist.

## 3    DISCUSSION AND CONCLUSION

Scottish tourism is a multi-faceted, heterogeneous and ever-changing industry, operating within a global market place. However, it is suggested here that that Scottish tourism is experiencing a particular and significant transition, which is characterised by changes in tourist holidaying behaviour (e.g. the 'short-break'), the emergence of national and international 'branded' accommodation providers as well as differentiated specialist providers and widespread access to online technologies. This has implications for established traditional hoteliers.

The argument presented is grounded in the view that the distribution of hoteliers in Scotland reflects the manner of their being found in a pre-online era. Whilst many factors can be identified explaining the positioning of a hotel (Ashworth, 1989; Shova & Cohen-Hattab, 2001), location within a locality is all important; to be found. The hotelier can be simplistically characterised as either one that is found by passing by with roadside-location being important or one that is located at an end destination and uses traditional promotional approaches such as brochures and adverts (Table 3). However, this generalisation disguises localised variation in the volume (number of tourists) and value (spend) of tourism to Scotland, in the modes of transport used to access localities and in the type of tourist.

However, tourism is continually changing in Scotland as elsewhere. There is an apparent decline in passing trade and traditional end destinations (e.g. resorts) appear to no longer have their former popularity. Furthermore, the profile of tourists is changing; there is an increase in both the short-break domestic tourist and the overseas tourist against a postulated long-term reduction in the longer-stay domestic tourist. City locations are emerging as popular destinations, as these new tourists head for the easy access locations (e.g. Edinburgh). This is anticipated to have an effect upon other localities in Scotland where tourism is important to both employment and income generation. One important factor in facilitating this change is the uptake and impact of online technologies. Indeed, just as the bicycle and motorcar permitted easier access to more and more locations in the spatial domain, these newer online technologies have allowed correspondingly easier access to these locations in the digital domain. Rather than being found in the spatial domain by the 'passer-by', hoteliers are increasingly being found online.

One of the implications of this pattern of associated developments is upon the behaviour of the hotelier. Certain hoteliers have recognised the opportunities to exploit these changes and have shaped their offering to meet the

new requirements. For example, the larger, commoditised and branded budget hotels and the smaller boutique hotels are establishing a presence in urban areas (e.g. city centres). In rural areas, the innovative hotelier is differentiating its offering on the basis of authenticity and quality, as exemplified by the award winning 'restaurant with rooms'. These examples typify the two idealised models of operators presented in Table 9. This distinguishes between the larger, commoditised and branded hotelier and the smaller specialist hotelier offering a differentiated, perhaps authentic, experience. In both cases, the providers are found online, with the former likely to use online booking, whilst the latter use email and the telephone to book. This resonates with Carroll's (1985) distinction between the larger generalist organisation and the smaller specialist. Moreover, it draws attention to those established hoteliers positioned between these polar positions identified to be in an inferior position with regard to price, uniqueness and niche targeting by Baum & Mezas (1992). Established hoteliers in the Newington area of Edinburgh, an established location for many of Edinburgh's hoteliers, are perhaps experiencing the effects resulting from new forms of hotelier who are establishing themselves within Edinburgh and who are exploiting online technologies. Indeed, Senior & Morphew (1993), also draw upon uniqueness and niche targeting suggesting that these established traditional operators need to segment their markets, differentiate their offering and improve service quality. In other words, if traditional hoteliers are to survive they need to reconfigure their offering. Moreover, the reconfigured offering, whatever it is, needs to be found. The traditional mode of being found is argued here to be in decline with being found online becoming an increasing trend. The age of touring by car is transforming into the age of touring online. This draws attention to how hoteliers are found online and what they need to do. It draws attention to initiatives beyond the isolated activities of individual businesses, which is an issue for further research. Nevertheless, an insight into the issues relating to this is outlined.

Given the importance of tourism to the different localities throughout Scotland, the described changes presented here raises concern about the strategies adopted by both individual accommodation providers and localities to sustain their tourism. It raises questions about both individual and community engagement with existing and potential tourists, how online technologies enable this and the nature of support given by government institutions. At a national level the government agency VisitScotland provides a promotional service to hoteliers. However, with the demise of the membership based Area Tourist Boards (ATBs) in 2005 there has been loss of a collective voice for hoteliers. Nevertheless, a growing number of local business communities with an active interest in tourism have taken the initiative and organised themselves to establish an online presence which allows their locality to be found, complementing individual efforts to exploit online technologies. What is emerging from this study is the recognition that for the established traditional hotelier to be found, is no longer a simple act of placing a notice on the side of the road and rely on passing trade, or placing an advert in a magazine and somehow attract the eye of the reader. Instead the hotelier must reconfigure the way things are done, in terms of the experience offered, as well as how this experience is delivered to potential tourists through the new digital domain characterised by online technologies (Harwood, 2011). Underpinning this is how the potential tourist finds the hotelier amongst the noise of all who are trying to be found.

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