

Museums, Galleries and Tourism Realising the Potential

Report of the conference held at
The Lighthouse, Glasgow
14 March 2005

Co-ordinated by Scottish Museums Council in partnership with VisitScotland and
Scottish Enterprise

Contents

Introduction / summary

Joanne Orr, Director, Scottish Museums Council

Tourism and the Scottish Economy

William McLeod, Director of Industry Services, VisitScotland

Tomorrow's Tourist

Ian Yeoman, Scenario Planning Research Manager, VisitScotland

Realising the True Impact of Museums and Galleries in Tourism

Professor John Lennon, Director, Moffat Centre, Caledonian University

Getting into Tourism

Ian Gardner, Marketing Manager, National Trust for Scotland

Product Development and Innovation in Tourism

Katrina Morrison, Senior Tourism Executive, Scottish Enterprise

Collaboration With New Partners - the Mackintosh Ticket

Dylan Paterson, Tourism Manager, Scottish Enterprise Glasgow and
Stuart Robertson, Director, Charles Rennie Mackintosh Society

Maximising the Tourism Markets and Potential of Museums: International Good Practice

Terry Stevens, Managing Director, Stevens & Associates

The Scottish Family History Service: Making Genealogy Easy

Joanna O'Rourke, Project Manager, Scottish Family History Service

Museums and Galleries – Their Key Role in Tourism

Eva McDiarmid, Chief Executive, ASVA

The Orkney Homecoming: A Case Study

Cameron Taylor, Seabridge Consultants

Questions and answers

Useful Contacts

Acknowledgements

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Executive summary

Joanne Orr, Director, Scottish Museums Council

Museums, Galleries and Tourism - Realising the Potential was a one day conference organised by Scottish Museums Council in partnership with VisitScotland and Scottish Enterprise. The event took place in The Lighthouse, Glasgow, on Monday 14 March 2005. The aim of the conference was to offer museums, galleries and partner organisations the chance to explore the opportunities and challenges of tourism.

Over 70 people attended, including curators, archivists, education, marketing and development personnel, including managers and directors from public, private and voluntary sector agencies across Scotland.

Presentations on the growing importance of tourism, potential impact of world change, role of museums and galleries, examples of international and national good practice and innovation were followed by panel sessions, in which delegates could question the speakers and air their own views.

Key points

Speakers identified the following key points:

- tourism across the world is growing. In Scotland, tourism revenues are expected to increase by 50% by 2015
- of the 19 million tourists in Scotland each year, approximately 90% come from the UK and Ireland and the rest from overseas. Scots make up 50% of UK visitors
- museums and galleries in Scotland attract 13 million visitors and account for about 40% of visits to visitor attractions. Cultural tourism is a component of almost 40% of international trips
- the World Tourism Organisation has identified a shift in tourist behaviour away from sun and sand towards culture
- tomorrow's tourist is likely to be affluent, sophisticated and older. S/he will not be willing to accept poor service or pay for functionality but will be willing to spend money on goods and services which 'add value'
- the most successful visitor attractions in the world, including museums and galleries, provide the benchmark for good practice. Although they are very diverse in the products they offer, research has revealed similarities in that they all have clear written mission statements, are results oriented, customer focused, fact-led, managed through systematic processes, value their employees, demonstrate visionary leadership and constancy of

- purpose, are innovative and outward-looking, work in partnership and have a sense of corporate social responsibility
- examples of good practice also exist in Scotland
 - opportunities exist for museums and galleries to get involved in tourism initiatives, work in partnership, develop their skills and to be rewarded for innovative thinking through:
 - the Scottish Tourism Forum's Tourism Innovation Group and Pride and Passion initiative
 - www.scotexchange.net, the Scottish tourism industry website
 - ASVA, the Association of Scottish Visitor Attractions
 - Scottish Enterprise and VisitScotland training, innovation and industry award programmes
 - working together.

The key message which emerged from the conference was that although the sector is very diverse, museums and galleries play a vital role in the tourism industry, as gatekeepers, key-holders and as iconic representations of authentic Scottish heritage and culture. However, the world is changing fast. Tourism is increasing but so is competition for visitors and the 'leisure £.' Museums and galleries – like other visitor attractions – must make greater efforts if they are to maintain and increase their share of the market.

Scottish Museums Council, VisitScotland and Scottish Enterprise plan to organise a second conference in winter 2005/06 order to showcase the museums and galleries' experience.

Tourism and the Scottish Economy

William McLeod, Director of Industry Services, VisitScotland

Tourism is a massive part of the Scottish economy, worth about £4.5 billion per annum. The tourism industry has recovered strongly since the terrorist attacks in America and the foot and mouth outbreak in the UK in 2001. Of the 19 million visitors in Scotland each year, approximately 90% (17.5 million) come from the UK and Ireland, while a further 1.6m people come from overseas. Over 50% of international and almost 30% of UK visitors visit museums and galleries. 50% of our UK visitors are made up of Scot's themselves.

VisitScotland's vision is to see a 50% growth in tourism revenues by 2015. The strong economy means that in the UK, people have more disposable income and take more holidays and short breaks. It also benefits the corporate market (meetings, conferences and business incentives), which yields nearly two and a half times as much as leisure tourism and accounts for one quarter of all money spent by visitors to Scotland. Key market drivers are a three-hour journey time, (by road, rail or air), together with product quality. People will no longer put up with third rate service for first class prices. The number of trips is forecast to increase by an average of 4.3% pa, with expenditure also increasing by 4% pa to 2008.

Through international marketing initiatives, VisitScotland aims to bring more overseas visitors to Scotland and to increase the amount they spend, particularly on retail, food and drink and entertainment. Direct access to Scotland from overseas markets is important for future growth. VisitScotland develops marketing which is appropriate to different countries and market segments eg. heritage and culture in the US, genealogy in Australia, New Zealand and South Africa. Core markets are North America, Germany, France, Sweden, Spain and the Netherlands. Italy, Norway, Belgium, Canada, Australia and New Zealand are all developing markets. Emerging markets include Finland, Switzerland, Austria, the Far East, Middle East, Latin America and Eastern Europe, especially Poland, Russia and the Czech Republic.

In order to achieve its vision within the next decade, VisitScotland sees a need to improve marketing, access and the delivery/quality of the experience.

Scotland the brand

Visitors see Scotland as 'enduring, dramatic and human.' However, Scotland is one of 192 countries, all of which market themselves on the basis of their friendly people, cultural diversity and beautiful scenery. In order to compete, marketing must reflect what consumers see and expect of Scotland.

Current VisitScotland marketing campaigns in the UK translate the essence of the brand into advertising campaigns such as 'the senses' - see/ hear/ feel/ taste/ smell Scotland - campaign. In the USA the focus is on living the Scottish

experience: 'Live it - Welcome to our life.' The 'product portfolio' on offer to visitors is epitomised as: freedom (open countryside), active (sports breaks), culture and heritage (including museums and galleries), citybreaks (and surrounding countryside) and business (for which some museums and galleries provide venues).

Approximately 40% of over 16s in the UK visit a museum, 30% visit a gallery and 50% visit an historic building once a year. In 2001, the Scottish Museums Council published *Collective Insight*, the report of the national audit of museums and galleries. *Collective Insight* identified 435 museum and gallery sites in Scotland, including 34 national organisations, 164 independents, 182 local authority facilities, 45 based in universities, eight military museums and two 'others.' In total, these museums and galleries housed 12 million objects and attracted 13 million visitors.

Museums and galleries have both national and international status as visitor destinations and as part of the tourist experience - and they play an important role in local provision. In a separate audit, the Visitor Attraction Monitor revealed that 195 museums and galleries attract 8.2 million visitors. Of these 195 visitor attractions, 128 offer free admission and account for 6.5million visitors while 67 paid entry sites account for 1.7 million visitors. Half participate in VisitScotland quality assurance schemes. Over 50% of visits are to local authority museums/galleries but the voluntary sector is also important. Examples:

Attraction	Visitors	Free (F) or Paid (P) entry
Kelvingrove (pre-refurbishment)	c 1million	F
Royal Museum of Scotland	686,000	F
New Lanark	405,000	F
Museum of Childhood	232,000	F
Dick Institute Museum	117,000	F
Scottish Fisheries Museum	102,000	P
Hunterian Museum	63,000	F
Museum of Country Life	56,000	P
British Golf Museum	44,000	P
Black Watch Museum	11,000	F

Museum and gallery collections link visitor and place through topics of interest, eg. architectural heritage, natural sciences, ancestry/archives, art, culture, sport and leisure.

A significant proportion of cultural tourists are in the 21-30 age bracket and enjoy citybreaks. Cultural tourism is a component of almost 40% of international trips.

In order to maximise visitor numbers, museums and galleries need to:

- know their customers and why they visit

- invest in content and presentation
- promote customer service skills – too often, consumer feedback relates to a poor attitude amongst staff
- market themselves
- recognise revenue opportunities
- work with each other, with VisitScotland and with the Enterprise networks.

Cultural tourism is a strong, diverse and much-valued element of the tourism portfolio, showcasing and interpreting everything from urban industry and the Arts to the rural lifestyle and how local foodstuffs are made. Scotland's cultural heritage is authentic – it cannot be created or re-located, it belongs to us, to cherish and enjoy.

VisitScotland's Strategic Priorities 2004-2007 are summarised in a leaflet, Scotland's Tourism Ambitions, available from VisitScotland (see Useful Contacts at the end of this report).

Tomorrow's Tourist

Ian Yeoman, Scenario Planning Research Manager, VisitScotland

Tourism across the world is growing at a rate of 4% per annum, mainly due to increases in disposable income amongst consumers and a desire for international travel. In traditional markets, tourist expectations are changing, business class prices are coming down as service levels rise, budget airlines and the internet drive down costs and tourists find they can tailor holidays to meet their particular requirements. The increasingly sophisticated tourist is seeking the unusual and the authentic experience rather than the shared, off-the-shelf holiday package.

The world is changing in ways which impact upon how people spend their time and money. There is more uncertainty. The gap between rich and poor is widening. The USA is the dominant power but Asia is rising and the European Union is expanding to include more eastern influences. We have a global society which wants to retain its local links. The relationship between people and governments is changing. The AIDS pandemic is destroying countries like Africa. Improved transport and IT affect access to places, people, goods and knowledge. Labour and demographics are more fluid. Oil and other natural resources are issues both in terms of supply and for the environment. Social revolution is coming.

Fear of terrorism and crime bodes well for the UK, which is the second safest country in Europe after Sweden. The population is aging, so older people will become significant consumers, prompting brands like SAGA to come to the fore. Children will make up a smaller proportion of the population but they will become even more important, both as consumers and as customers of the future. Education, science and technology will make the world smaller, more liberal (with the possibility of a morality backlash) and more cosmopolitan in outlook. Robotics will foster new domestic technologies.

The result will be a 'have it all' society which favours individual choice and control. There will be greater longevity, new life courses, multi-culturalism and extended but 'networked' families in a society concerned with health, obesity, safety, anxiety and a blame culture. It will be an affluent society interested in taking time off and achieving a rewarding work/life balance. There will be a culture of change and immediacy. The World Tourism Organisation has identified cultural tourism, cruise tourism, short breaks, international meetings and ecotourism as areas for growth, alongside the growing hedonism, relaxation and family markets.

Increasing diversification in the tourism market can make it difficult to identify the different market segments on which organisations can base their business planning. Using the principles of cognitive mapping, which looks at how an individual might think when faced with different problems or scenarios, it is

possible to imagine some tourism scenarios which might reveal the different consumers of the future and their needs.

Tomorrow's tourists might include Mr and Mrs Jose MacDonald-Mourinho, an elderly Panamanian couple who travel to Scotland in 2015 in search of Jose's ancestors, after accessing www.ancestralscotland.com and meeting local couple James and Fiona MacDonald in the chatroom. Or Zheun Xia, from China's growing middle class, who flies direct from Beijing to Glasgow with Pro-am sporting holidays to act out her dream of training on the synthetic turf on New Firhill at Partick Thistle, coached by a professional football player. Or Estonian businessman Rocco Di Vinci, who expects excellent travel and communication facilities plus five star accommodation and service, without the five star price. Or part-time social worker Sheena Williams, who enjoys all the culture that her home town of Edinburgh has to offer.

The World Tourism Organisation has identified a shift in tourism behaviour away from sun and sand towards culture and the sophisticated tourist. As more of us want to see more of the world and experience its authentic cultures, destinations once seen as tourism icons (such as the USA, France and Switzerland) will by 2015 have slipped down the world table to be overtaken by destinations such as India, China and Turkey.

As more of us participate in education programmes we place a higher emphasis on culture in society. This - combined in a well-travelled consumer with liberal attitudes, a desire for self-actualisation and 'living the experience' - makes culture an important driving force within tourism. Scotland already hits the right buttons in terms of history, culture and scenery. However, we need to recognise that although the UK consumer has twice as much disposable income in 2005 than in 1985, s/he is no longer willing to pay a premier price for functionality, only for added value.

Extracted in part from Tomorrow's World, Consumer, Tourist, a VisitScotland bulletin by Ian Yeoman and Colin Munro, March 2005.

A further overview of Future Trends in Lifestyle and Leisure: Getting ready for tomorrow's tourism industry today is available as from Scottish Enterprise. See www.scotexchange.net/kym_future_trends_research

Realising the True Impact of Museums and Galleries in Tourism

Professor John Lennon, Director, Moffat Centre, Caledonian University

Museums and galleries can achieve iconic status. The TATE brand is now synonymous with London, for example. In its first year, the gallery attracted 5.25 million people, prompting the *Daily Telegraph* to call it 'the most popular modern art museum in the world,' with three times the visitors of its nearest rival in Europe, the Pompidou Centre in Paris.

In Scotland, the role of museums and galleries has been acknowledged in the Scottish Cultural Strategy (1999), which says that 'Museums and galleries make an important contribution to education, citizenship, social inclusion and tourism.' The economic contribution which they make to tourism in particular has been investigated in a new study by the Moffat Centre for Travel and Tourism Development, commissioned by the Scottish Museums Council.

The research drew on museum data from the 2003 Visitor Attraction Monitor (VAM), The National Audit of Scotland's Museums and Galleries published by SMC in July 2002 and from a British survey of Visitors to Museums and Galleries 2004, conducted by MORI on behalf of the Museums, Libraries and Archives Council (MLA). The study found that although Scotland has the highest number of museums per capita in the UK, the cultural sector is so diverse that it lacks clear definition. It is difficult to measure the impact of the sector, or to make comparisons within it.

Museums and galleries are suffering from an identity crisis – they may be visitor attractions for the purposes of the Visitor Attraction Monitor but otherwise they see themselves as traditional public service providers, conserving the nation's cultural resources. There are different definitions of museums and of visitor attractions, too.

What museums and galleries do is to 'package' Scotland's cultural heritage. They embody it in their period building/structure, in their presentation of the material culture of the nation, in showcasing cultural personalities like Burns and in interpreting historical objects and events. For example, museums across Scotland will focus on Robert Burns during Burns 2009, the big international homecoming event which the Scottish Executive is planning to mark the 250th anniversary of the poet's birth.

Images of museums and galleries play a significant role in developing Scotland as a 'must visit' destination for tourists. Like Burns and TATE, they are used as iconic brands in destination marketing. Photographs of Kelvingrove Gallery and Museum, Paisley Museum, the Museum of Scotland and Aberdeen Museum all used in branding cultural, business and city tourism and regeneration initiatives.

Most museum visits are undertaken by people from ABC1 households but museums and galleries themselves show little evidence of investment in marketing. Some of the country's most significant collections do not have an allocated budget or dedicated marketing staff. Given their current popularity, there can be little doubt how big their potential could be.

The cultural markets identified in the Moffat/SMC study include popular culture, high art, special interest, minority groups, education, community history and world culture. The family market is important. More museums and galleries could link in with the school curriculum, use creative arts and consider party hire and stay-overs, to encourage people in. Museums and galleries already have long-established links with traditional universities, offering placements and student volunteering opportunities. Forging links with new universities could bring benefits in terms of marketing, tourism students and research.

According to MLA/MORI, 49% of visitors to museums and galleries tend to visit when there is a special exhibition, 48% when on holiday or a short break. 7% go to museums and galleries just to use their catering or retail services. Overall, more people visit museums and galleries than go to football matches. At 37%, visiting a museum or gallery is the equal third most popular leisure activity in the UK after going to the cinema (59%) or library (51%).

Museums as visitor attractions

VisitScotland has defined 'visitor attraction' as 'an attraction where the main purpose is sightseeing. The attraction must be a permanent established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education... It must be open to the public, without prior booking (and) be capable of attracting day visitors or tourists as well as local residents.'

The MC/VS Survey of Visits to Scottish Visitor Attractions 2003 listed 986 visitor attractions, of which 437 were museums or galleries. Across 670 visitor attractions 37,922,813 visits were recorded and of these, 269 museums recorded 14,177,259 – 40% of the total. Museums and galleries are a key part of the Visitor attraction product.

Visitor Profile

74.5% of visitors were adults and 25.5% were children. 52.7% were local people. 30.5% were domestic on an overnight stay. 16.8% were overseas tourists. School visits account for 4% of all visits.

On average, the revenue spend per visitor totalled £4.04, which may be broken down into the admission charge (£1.37), donations (£0.17), catering £0.55, retail (£1.91), other (£0.05). At the cinema, the average spend is likely to be more than twice that amount.

The average 'dwell time' in a museum or gallery in 2003 was 67 minutes, of which 47 minutes were spent in the actual attraction, 6 minutes in the museum café/restaurant, 8 minutes in the museum shop and 7 minutes in 'other' eg. visitor information. This compares with an average dwell for all attractions of 82 minutes.

Key market drivers encouraging or discouraging visits to museums and galleries include poor weather, marketing, events/temporary exhibitions, refurbishment/new development, signage, admission charge policy and global issues eg. war.

True impact of museums and galleries

As part of the built heritage landscape, museums and galleries are the iconic representation of Scotland and a major motivation for tourists. They play an important role in income generation, as employers and as providers of work experience, volunteering and educational opportunities. Staffed by a significant number of unpaid volunteers and part-time or seasonal staff, they provide a low cost, high impact marketing tool for the country. Front-of-house museums and galleries staff are key ambassadors for Scottish tourism.

The current policy focus on lifelong learning and community development is geared to widening access through partnership working. Museum and gallery collections also play a vital role in instilling a sense of community, ownership and personal identity at a time of increasing cultural diversity, and have the potential to play a role in developing citizenship.

Getting into Tourism

Ian Gardner, Marketing Manager, National Trust for Scotland and Chair, ASVA

Closer involvement between museums, galleries and tourism is promoted through the work of the Scottish Tourism Forum and its Tourism Innovation Group and Pride and Passion initiative, as well as through the Scottish Museums Council and ASVA, the Association of Scottish Visitor Attractions. Scotexchange.net, the website of the Scottish tourism industry, is very valuable as an information resource.

ASVA is a trade association set up to improve the quality and viability of visitor attractions in Scotland. It is not a marketing consortium but a self-help business development group, helping attractions - and the whole sector - to get the most out of the opportunities they have. The spring seminar on 4 May 2005, in Our Dynamic Earth, is open to members and non-members. ASVA and the SMC complement each other in bringing together museums, galleries and tourism and are looking at ways of extending collaboration. Both are members of the Scottish Tourism Forum, another trade body, which acts as the independent voice for tourism businesses, and for the 215,000+ people – 8% of the total workforce - they employ in Scotland.

Scottish Tourism Forum

The Scottish Tourism Forum represents the industry to the Scottish Executive, VisitScotland, the Scottish Parliament and elsewhere. It also acts as a communications channel within the industry, providing newsletters, workshops and members' meetings. It is funded by memberships, donations, sponsorship and income derived from project management and is made up of trade associations, companies, marketing groups and local tourism action groups – all of whom play an active role in developing tourism in Scotland today. Examples of the Forum in action include giving evidence on behalf of the industry to the Parliament's Enterprise and Culture Committee in their recent inquiry into the review of the ATB network, playing an important role in representing and facilitating the industry's views in the new VisitScotland integrated network, and currently, leading a dialogue project within the industry over the Scottish Executive's refresh of the national tourism strategy.

Alan Rankin, Chief Executive of the Scottish Tourism Forum, ran Dundee Heritage Trust for a number of years and the Board has been reconstituted recently to ensure a more even spread across the industry in terms of geography and activity. The Forum's meetings of members bring together the public and private sectors to discuss and debate the key issues of the day, face to face. They have proved an important way of keeping members up to date on developments in the new integrated VisitScotland network, as well as providing networking opportunities. In March, members heard first hand from Marco Truffelli, Chief Executive of visitScotland.com, Riddell Graham, VisitScotland's new Director of Strategy and Communications and Patricia Ferguson, the

Minister for Tourism, Culture and Sport. A policy advisory group of the Forum brought together most of the key players from the transport world to look at how impending legislation might affect the tourism industry. The Scottish Tourism Forum also supports the management and development of two other important threads in the tourism tapestry – the Tourism Innovation Group and the Pride and Passion Initiative.

Tourism Innovation Group

The Tourism Innovation Group (TIG) was set up three years ago, by the private sector, to promote and encourage innovation across Scottish tourism. With ever-greater competition for visitors and the increasing sophistication of their needs, innovation must be at the heart of the tourism industry. TIG's mission is one of 'driving and sustaining the innovation agenda, which focuses on the development of new products, services and ways of working, to enhance competitiveness and productivity.' The group is made up of around 50 business leaders and entrepreneurs from across the sector. It focuses on five key themes: communications, transport, sustainability, linkages and global perspectives. A wider Tourism Innovation Movement has also been developed to extend the message and work throughout more of the industry.

There are also close links between the Innovation Group and the work of the Pride and Passion project, a campaign to help tourism businesses to put the customer's experience at the heart of everything they do. Research repeatedly shows that although Scotland has many great assets as a tourism destination – notably its built, natural and cultural heritage - it can fall down on value for money, customer service and, perhaps most importantly, consistency in the whole customer journey.

Pride and Passion

Pride and Passion's aim is to encourage Scotland to offer visitors a consistently distinctive and exceptional experience in a relaxed and authentic way. 'Authenticity' is a critical factor - Scotland's people are generally thought of as warm and friendly and we do not want to falsify this by creating an artificial 'have a nice day' culture. Rather, the aim is to encourage people to be themselves but to be welcoming and to put customers first, consistently. It is not about imposing new rules and regulations but about changing hearts and minds, to make the most of the pride and passion that so many of us have for Scotland. A smile when a visitor comes in or showing a genuine interest in them can make a difference – not just across museums, galleries and other tourist-related organisations but in shops, buses, taxis, banks, anywhere visitors may have contact.

The task may be daunting but the results will be well worthwhile. More visitors having their expectations exceeded will lead to more word-of-mouth recommendations and more repeat visits. Pride and Passion has adopted four approaches to the initiative:

- understanding more about what visitors expect today and will expect tomorrow
- helping tourism partners see the visitor's viewpoint more clearly
- helping to raise awareness of key issues across Scotland as a whole
- making tools, information and support available so that good words and intentions can become reality.

Pride and Passion's approach is 'bottom up.' By developing a Circle of Friends, people with a reputation for putting visitors first, Pride and Passion hopes to spread the word and influence others to follow suit, sharpening the focus on visitors.

The National Trust for Scotland is a good example of an organisation that is 'into tourism.' It benefits through marketing, training, networking, funding or in contributing to the continued success of tourism in Scotland. Those benefits can be enjoyed by everyone in museums and galleries. ASVA, the Scottish Tourism Forum, Tourism Innovation Movement and Pride and Passion's Circle of Friends are just a few ways that museums and galleries can get into tourism. All it takes is a bit of joined up thinking and everyone wins – the industry, staff and most importantly our visitors.

Innovation & Product Development in Tourism

Katrina Morrison, Senior Tourism Executive, Scottish Enterprise

The needs and wants of visitors are changing. By 2020, the over 50s will outnumber younger generations. One in five over 60s will take three or more holidays a year. Over the last 10 years, our leisure time has declined by 100 hours a year. With less free time, we want to be able to cram a lot into a short break. We want everything we do to go smoothly and we want to plan our time in advance. Visitors are wealthier. More than 25% of the world's population now enjoys a lifestyle that used to belong only to the rich. By 2020 there will be 1.9m millionaires in the UK. However, modern life impacts on our health. Visitors seek escape, self improvement and well-being during their time off.

Extensive research into successful tourist destinations has shown that we need to monitor such changes in market trends and respond accordingly. The way forward for those who want to attract visitors is to:

- focus on the customer – provide what they want, when they want it, at the rate they want to pay
- be innovative
- encourage leadership within the industry
- promote best practice – copy what works, in the UK and abroad
- work in partnership – identify and work together towards common goals, whether public or private sector, community organisation or business.

In the light of these areas of possibility and considering the economic development framework set out in Smart Successful Scotland, Scottish Enterprise has identified four priorities for its work in tourism: skills, infrastructure, innovation and product development.

Skills training

Scottish Enterprise is fostering the growth of tourism-related skills through a series of masterclasses, conferences and workshops and through learning journeys and a short course programme. Masterclasses are open to anyone. They are aimed at informing participants about future trends, marketing, branding, quality and product development. Conferences focus on service, business tourism and some of the product areas. Workshops take an in depth look at specific issues.

Infrastructure

The Scottish Enterprise approach to infrastructure is based on the premise that everything in a destination must work in order to provide a positive customer experience.

Fostering innovation

The focus of our activity in innovation is in three key areas: the Tourism Innovation Tool-kit, Tourism Innovation Development Awards and the Tourism Innovation Day.

The Innovation Toolkit is a tool that helps businesses to come up with new ideas, structure their thinking and work together. The toolkit can be used in a number of different ways. Open workshops include sessions on how to use the toolkit when participants return to their own businesses, however as many organisations prefer the help of an external facilitator, we also run in-house workshops. We have found the toolkit works particularly well in groups where participants gather from different organisations, to focus on a specific theme e.g. wildlife tourism, or the group currently working on luxury retail in Edinburgh. Details of how to access these workshops are available from Local Enterprise Companies (LECs).

The Tourism Innovation Development Award (TIDA) is given to organisations whose idea for a product or service is judged to be truly innovative and feasible. Winners receive up to £15k matched funding plus mentoring support to ensure that they can turn their idea in to a real product or service. So far there have been 23 winners from 124 applications.

The Tourism Innovation Day was launched in 2003 in an attempt to get more businesses thinking about innovation. This year's event will take place on 17 May 2005 at Glasgow Science Centre. Book online at innovation@eventconsultants.com

Product Development

Scotland has the potential to be really competitive in a number of product sectors including ancestral tourism, whisky tourism, forest tourism, country sports, angling, food tourism, nature-based tourism and golf. Scottish Enterprise is working with a range of partners in these areas. The process involves bringing together an industry led steering group, undertaking a market appraisal, sharing research, identifying opportunities, creating ideas for development and then working together to put ideas into practice.

Ancestral tourism is one example. From research, we now know that there are about 50m people in the world who have Scottish ancestors, many of whom just need to be encouraged to visit. They do not just want to search through records, they also want to visit places of special significance, to live the experience, to make an emotional connection. Partner organisations have recognised that everyone who comes into contact with the ancestral tourist can play a vital part in

instilling a sense of place, history and culture in a way that is unique for every visitor. Further information may be found on www.scotexchange.net.

Collaboration with New Partners - the Mackintosh Ticket

Dylan Paterson, Tourism Manager, Scottish Enterprise Glasgow and
Stuart Robertson, Director, Charles Rennie Mackintosh Society

In *A Policy on Architecture for Scotland*, the Scottish Executive states that one of its objectives is 'to foster excellence in design, acknowledge and celebrate achievement in the field of architecture and the built environment and promote Scottish architecture at home and abroad.' The Charles Rennie Mackintosh (CRM) Society is an independent charity, established in 1973 to promote and encourage awareness of the architect, designer and artist, Charles Rennie Mackintosh. Mackintosh's talent is celebrated internationally. Much of his surviving work is in his home town of Glasgow, eg. The Lighthouse, Glasgow School of Art, House For an Art Lover, Hill House (Helensburgh), Willow Tea Rooms, Scotland Street School Museum, Mackintosh House, Hunterian Art Gallery and Glasgow Style Collection.

The city's 12 Mackintosh properties collectively attract over 400,000 visitors every year. The Society produces high-quality promotional material, in association with the properties, to market Mackintosh to the widest possible audiences. The Mackintosh Trail Ticket was introduced to use Charles Rennie Mackintosh's legacy to 'inspire growth and build the future.'

The ticket

The Mackintosh ticket is a one-day scratchcard ticket that not only allows customers unlimited travel on the Subway and on First's bus services in Greater Glasgow, but also includes entry to all participating Mackintosh attractions in and around the city. It costs £10 from Glasgow Tourist Information Centres, SPT Travel Centres and participating venues.

The format of the ticket is based on SPT's Daytripper ticket. Initially a two-day ticket was envisaged, but this would have taken three years to achieve under current legislation. The ticket is packaged in conjunction with the Mackintosh Legacy leaflet, which has information on all the Mackintosh attractions and has been updated to include transport information.

The project represents a successful collaboration between the lead marketing organisation (the Tourist Board), the product (the attractions) and transport services (SPT & First) to offer a new means of accessing, promoting and packaging Mackintosh's unique collection of work.

Partnership process

The starting point for the project was to bring together a number of the key players, to open a dialogue about the Mackintosh legacy – what it is, who 'owns' the legacy, who the audience is and what the potential benefits might be. The initial group consisted of representatives of the Charles Rennie Mackintosh (CRM) Society, Hunterian Art Gallery, Glasgow City Council, Willow Tea Rooms,

Glasgow School of Art, The Lighthouse, House for An Art Lover and Scottish Enterprise Glasgow.

After an Innovation Toolkit workshop, the group was expanded to encompass the Greater Glasgow and Clyde Valley Tourist Board, Strathclyde Public Transport (SPT) and another major public transport service provider, First. This was essential for closer collaboration on planning and provision between the sectors.

Development of the ticket took over a year of work. A press launch was held at the House for an Art Lover on 22 June 2004. The ticket is administered by the Society. SPT, the Tourist Board, First and the Society all provided marketing support eg. train station and subway poster sites, on-train/bus advertising, outdoor poster sites, leaflet/poster/information pack distribution, website promotion and coverage in publications eg. *Interchange* and the *Essential Guide*.

Each venue attraction has a registration pad which enables staff to log sales and tickets used. After a designated time, each venue summarises ticket sales and other data and money is distributed accordingly.

The ticket was piloted, June – September 2004, to monitor demand and evaluate all levels of the audit trail. In that time, approximately 700 tickets were sold and early feedback has been very positive. The ticket offers:

- good value to the customer
- discounted entry to venues and/or 10% discounts on gift shop purchases/refreshments
- effective use of limited time
- a one-stop shop purchase, on the day or in advance
- potential as a conference add-on for delegates and their partners
- a seamless experience involving two types of public transport and 12 Mackintosh visitor attractions.

The initiative capitalises on Mackintosh's popularity and raises his profile. It increases the number of visits to Mackintosh venues and encourages residents to see more of the city's attractions, including those not in the city centre. Tourism also benefits in that the ticket reinforces Glasgow's reputation as a short break and day-out destination and improves the infrastructure.

The Mackintosh ticket is a first for Scotland; there is no similar service anywhere for tourists. Early evaluation indicates that it is here to stay.

Further information about the ticket is available from Stuart Robertson, Director, Charles Rennie Mackintosh Society. Tel: 0141 946 6600. E-mail stuart@crmsociety.com

Maximising the Tourism Markets and Potential of Museums: International Good Practice

Terry Stevens, Managing Director, Stevens & Associates

In 2004 Scottish Enterprise commissioned Stevens and Associates to undertake an international study of world-class visitor attractions, to identify aspects of good practice which can contribute to success. At the time, the number of visitor attractions in the UK was outstripping demand. Increasing competitiveness and a lack of innovation had led to a number of high profile failures. The study was an exercise in benchmarking – ‘the continuing process of measuring products, services and practices against the toughest competition of those recognised as leaders’ – in order to stimulate change, improve performance and encourage best practice.

Examples of award-winning attractions and recognised examples of good practice were identified through online research, literature review, expert advice and a panel of industry specialists. An original list of 46 attractions was drawn up, but this was reduced to 22, representing those which were willing and able to commit the resources to participate. Of these 22, eight were single attraction operations and 14 involved multiple attraction owners. The single attractions were the Kentucky Derby Museum, USA, the Maker’s Mark Distillery, USA, Crealy Adventure Park, England, Harewood House, England, Kiasma Arts Museum, Finland, the Finnish Sports Museum, Waterford Crystal, Ireland and Robben Island (where Nelson Mandela was imprisoned), South Africa. The multiple-attraction operators included Shannon Heritage, Ireland, Merlin Entertainment (which runs London Dungeon and Weymouth Sea-life Centre) and Historic Royal Palaces, London.

Research took the form of interviews, site visits, and key questions, according to a template.

Overview of good practice

Although the nature of the attractions ranged from museums and galleries to distilleries, palaces, adventure parks and wildlife conservation areas, the study revealed similarities in the way all the attractions were managed. In each case:

- an organisational **mission** statement clearly set out the primary purpose of each attraction, so that operational targets and objectives could be established. Eg. Crealy Adventure Park’s mission is: ‘Maximum fun guaranteed for guests: maximum satisfaction for staff.’
- organisations applied **eight principles of good management** - results orientation, customer focus, management led by systematic processes and fact, people development and involvement (valuing employees and partners), visionary leadership and constancy of purpose, innovation, partnerships and corporate social responsibility.

Some leaders were designated as Chief Operating Officer (CCO), rather than Chief Executive, for example, emphasising the operational importance of the role.

The manifestation of the systematic mission-vision-strategy approach was a high-quality visitor experience, characterised by:

- an attractive, unambiguous and strong sense of arrival with accurate information, signage and good first impressions
- high standards of service by customer focused, motivated staff
- on-site staff that have genuine pride in their work, belief in the attraction and themselves
- clean, well-maintained exhibitions, amenities, grounds, landscape and equipment (nothing broken, fresh looking, no litter)
- a product that is appropriate for its market(s), is organised and promoted accordingly with a strong sense of place
- innovation and which is regularly refreshed
- high quality retail and catering that is attractively presented
- an emphasis upon entertaining the guest through activities, events and animation.

Case study – Kiasma, Helsinki

Kiasma, a contemporary arts museum, is state-owned and attracts 250,000 per year. The product base is a mixture of permanent and temporary art exhibitions with a wide range of activities and events, supported by a themed shop and gallery. It charges for admission but access to the shop, café and some temporary exhibitions is free.

Kiasma's mission is 'the creation of a dynamic, vibrant, exciting and high quality centre to allow people of all ages to meet and explore contemporary art in all its forms and to gain experiences.' The mission forms the basis of five operational values which may be summarised as customer-related, economic, human, process and co-operation, and developmental and regenerative values. In terms of management style, Kiasma is 'a place driven by values where every voice is heard.'

Customer focus is illustrated by the Love Me or Leave Me initiative, where visitors are involved in selecting exhibition content. Ask the Artist, the Like Room, *Kiasma* magazine and a range of 'keys' are designed to improve understanding

and access to the art. Events include an 'urban disco' and educational outreach is offered through School on the Move. Opening hours are long. The gallery is 'what the public want it to be.'

Other examples

Other examples of innovation and good practice included:

- use of CEO comment cards, mystery shopper visits, visits to competitor attractions (Merlin Entertainment).
- offering evening entertainment eg. living history, storytelling, satisfaction tracking, weekly team action plan, one-to-one guest marketing (Shannon Heritage)
- launching the Harewood Card and a modern art gallery, providing visits to disadvantaged groups through partnerships with other agencies, offering a £1000 incentive bonus to retain seasonal workers (Harewood House)
- innovative but relevant events eg. Horsing Around with Art and events relating to racecourse architecture, fashion and women in racing (Kentucky Derby Museum)
- establishing a media partnership, so that the museum is a research service and resource for TV and radio sports programmes (Sports Museum of Finland)

All of the attractions in the case study had a reputation for being outward-looking eg. they participate in activities within the attractions industry in both the domestic and international arenas. This means that they are generally at the forefront of policy debates and close to the major trends and developments. It also allows them to substantiate their reputation for good practice, innovation and sustained success.

The *Visitor Attractions International Benchmarking Study* is available as a report in CD format. Further copies are available from the Services to Industry Group, Scottish Enterprise.

The Scottish Family History Service: Making Genealogy Easy

Joanna O'Rourke, Project Manager, Scottish Family History Service

At the moment, the Scottish Family History service is located at two main sites: General Register House, home to the National Archives of Scotland - and New Register House, home to the General Register Office for Scotland and Court of the Lord Lyon.

The National Archives of Scotland (NAS) holds records from as far back as the 12th century, including wills, Kirk Session records, tax records, non-conformist church records and family papers. Most of these are only available in their original, although a few are in digital format. There is no charge for accessing the National Archives of Scotland.

The General Register Office for Scotland (GROS) houses statutory birth, marriage and death records from 1855 to the present day, census records from 1841 to the present and Old Parish Registers of baptism, marriage and burial (1553 – 1854). The digitised resource includes 20 million pages and 60 million entries. A fee is charged for a day or half day's research.

The Court of the Lord Lyon (CLL) administers the Scottish heraldry system. The office dates from the 14th century and holds 12,000 grants of arms from 1672 to the present day. CLL provides access to original records only at present, although the collections are currently being digitised. The Court charges a fee for searches, which are conducted by appointment only.

The National Archives of Scotland, Court of the Lord Lyon and General Register Office for Scotland occupy two buildings on Princes Street. Though linked, their services have been managed and marketed separately, which has led to some confusion amongst the public.

A new project is underway to establish an integrated Scottish Family History Campus in Edinburgh. The move reflects increased interest in genealogy and ancestral tourism generated by the internet and television. It also marks closer collaboration and partnership between tourism, enterprise and cultural bodies.

Project aims

The project aims to create a single access point to key genealogical sources (physical & virtual), through a facility situated at the east end of Princes Street. The vision is to establish a centre of excellence, become a world leader in service provision, make the most of the magnificent buildings available, to increase visitor numbers and encourage local research.

Outcomes will include a more clearly defined service, with two new search rooms (providing a total of 178 places), improved disabled access, new exhibition/seminar space, retail and reception areas. Additional services will also

be developed. There will be new charging and staffing structures and an expanded and redesigned joint website at www.scotlandspeople.gov.uk

Building work will take 18 months, commencing May 2005. The centre is due to open in summer 2006. Integrated IT systems should be in place at Register House in autumn 2005

There will be potential for collaboration with local archives and local family history centres, with the option of bulk access to ScotlandsPeople for libraries and schools. The new ScotlandsPeople brand is distinctive but flexible eg. ScotlandsPeople Inverclyde, ScotlandsPeopleOrkney - responsibility for development is at the local level.

The project has potential to link in with museums and galleries, capitalising on the synthesis between objects and archives. Museums and galleries already provide a local focus for genealogy activity. Local centres should offer greater potential for local collaboration and quicker access to basic sources, leaving visitors more time to spend on complementary resources.

Museums and Galleries – Their Key Role in Tourism

Eva McDiarmid, Chief Executive, Association of Visitor Attractions (ASVA)

The 1845 Museums & Libraries Act and the 1852 Recreation Grounds Act were established to provide people with positive, mind expanding leisure activities in the form of museums, libraries, parks and sports and 'Rational recreation' as it became known, was seen as a way to 'keep the masses happy' at a time when many workers had moved from rural to urban areas. The new laws were a way of distracting the workers from their poor and overcrowded living/working conditions and to maintain their productivity.

Museums and galleries sprang up across the UK, even in some of the more remote areas of Scotland, eg. Tomintoul, Kirkcudbright, Montrose, Nairn, Moffat. Often, they developed from the private collections of local businessmen. They helped to showcase the town and engender civic pride, as well as glorifying the individual who endowed the collection.

Today, museums and galleries still make up the biggest proportion of the visitor attraction sector (over 20%), followed by heritage visitor centres (16%). So far museums and galleries may be managing to hold their own but they did experience a slight drop in market share from 24% in 2000 to 21% in 2003 (without closure of Kelvingrove in 2003, that figure may have been closer to 23%). The competition is fierce and not just from other visitor attractions – retail, sports and home-based leisure activities are all competing for 'the leisure £'.

Key role

Tourism marketing campaigns and media travel articles often feature museums and galleries for an area – they act as major 'pull factors' alongside other leisure activities such as gourmet eating, boat trips, scenic walks etc. Museums and galleries make the link between people and the authentic past by way of their collections. They help to define an area and tell a true story in a way that is authentic and enduring.

Responding to competition

Leisure has not developed in isolation, its use is reflective of economic, social and technological trends. As a result, museums have to offer the public what it wants. In recent years, one of the most successful exhibitions at the National Museum of Scotland was Game On, which was all about computer games – a subject just over 40 years old¹. Game On was also significant in that it attracted an audience not traditionally drawn to museums.

Lateral thinking is required to bring people in eg. hiring out facilities, events, longer opening hours, free evenings. Someone even suggested running a singles night. What would be the risks of this strategy and what would be the benefits?

¹ Spacewar was developed in 1962

In Berlin, all state museums open until 10pm on Thursdays and on two nights a year they hold the 'Lange Nacht des Museens' when museums are open until 2am with bars and restaurants following suit. It is very popular. On a weekly basis, they also hold other late night openings in conjunction with other visitor attractions in the city. Landform, the dramatic landscaping project outside the National Gallery of Modern Art, not only won the Gulbenkian prize 2004, worth £100,000 - the serpentine, stepped mound with its three crescent-shaped pools has also attracted record numbers of visitors to the gallery.

Black Country Living Museum, Callendar House and Bunratty Folk Park, Shannon are all examples of heritage interpretation which 'speak to the audience in a language they understand.'

Awards in Scotland

ASVA offers marketing awards each year for best leaflet and best website. The competition attracts a large number of high quality entries from across the visitor attraction sector. Museums and galleries do feature but more would be welcome.

The benefits of the award are that it rewards the organisation and those who work there for their work, recognising effort and excellence and offering the possibility of media coverage. In addition, the whole application process makes the organisation focus on what it is doing.

VisitScotland's Scottish Thistle Awards aim to reward excellence in all areas and at all levels of the tourism industry, by encouraging professionalism, innovation and creative thinking, promoting quality service and products that truly reflect all that is best in Scotland.

Award-winning attractions/projects in Scotland have included the National Trust for Scotland 'Discover Highlands' campaign (visit three featured sites and a fourth is free), Glasgow Museums website - www.glasgowmuseums.com, the Tomb of the Eagles in Orkney, Creetown Gem Rock Museum, Mercat Tours, Fetlar Interpretive Centre (Shetland), the Scottish Mining Museum and Gordon Highlanders Museum.

The Orkney Homecoming: A Case Study

Cameron Taylor, Seabridge Consultants

The Orkney Homecoming took place in 1999 when approximately 250 people with Orcadian links, mainly from Canada, returned to the island to visit the home of their ancestors.

The idea had originated at the World Travel Market in 1996, following discussions about cultural tourism, the approaching millennium and historical links between Orkney and Canada via the Hudson Bay Company, which had employed many Orcadians, some of whom had settled in Manitoba.

As word spread, especially through the Internet, the Homecoming idea quickly expanded in scope. It had strong emotional appeal among overseas communities who had a very mixed ancestry, based as it was on real-life family connections to their place of Scottish heritage.

The Hudson Bay Company supported the event through their own museum and archive collections. There was also a high level of media interest. The event was driven by a push-pull momentum, as marketing from the Hudson Bay Company acted to push the target market out of Canada and Orcadian focused on enabling their visit, fuelling the pull home.

Everyone in Orkney has relatives in Canada. The initiative attracted strong museum support and community involvement. P&O Ferries dedicated and decorated a ship to the home-comers. When the ferry drew into Stromness, the captain pointed out the harbour frontage from which Hudson Bay Company ships once departed. On behalf of the people of Orkney, he welcomed his passengers home. There was silence and tears onboard and among the waiting islanders. It was a very emotional moment.

The Orkney Homecoming was an ideal marriage of heritage and tourism. The short term benefits were economic, profile-raising, cultural, social and educational, ranging from an increase in whisky sales to the signing of a Treaty of Friendship between the people of Orkney and the people of Manitoba.

In the long term, the Homecoming has lent impetus to ancestral tourism, fostered links between museums and archives, at home and abroad, supported economic links and cultural exchanges, provided speakers for Science Festivals in Orkney and in Manitoba, and generated a touring exhibition, Home and Away, Highland Departures and Returns.

The Homecoming shows that if they work together, tourism and museums are a powerful attractor. Museums and galleries are not just places to house relics, they are monuments of heritage in the landscape, holding the artefacts of community.

Questions and answers

Delegates had the opportunity to question speakers and express their views during panel sessions and break-out sessions. What follows is a combined summary. Bullet points represent the responses that were given.

What can we do as a sector to make ourselves more visible?

- refurbishment offers places like Kelvingrove the opportunity to achieve the iconic status achieved by the Tate Modern
- lobby more; the sector needs to increase lobbying
- produce better visitor profile data
- organise an event to raise the profile of museums and galleries in the tourism sector
- work with other industry sectors and each other; think laterally; engage with visitors; add value.

There is low expenditure on marketing within museums and galleries and conflict with other priorities. What can we do about it?

- look at the mission statements and policies of the Tate or the Met in New York – they want to be important curatorially but they give equal prominence to their commercial mission
- talk to the politicians about funding
- remember that the consumer of the future is more affluent and cultured – and s/he wants authenticity which is innovatively presented
- partnership and collaboration could help museums and galleries to access skills and funding which already exist elsewhere.

How do we get involved in Pride and Passion?

- contact Jennifer Neil, the Project Director, on 0131 220 843 or through scotexchange (see Useful Contacts below) or e-mail enquiries@prideandpassion.net

Our Trust depends heavily on volunteers. Older people may not have the skills we need. How do we attract young people?

- universities have student volunteer schemes

- link in with your local Millennium Volunteer Centre, schools, college and/or youth organisations

Some of Scotland's hotels are not as ecologically green as those in some other European countries. How are sustainability policies affecting tourism?

- while there is little evidence that not being as green as other countries is putting tourists off, the Green Tourist Business Scheme is encouraging ecological awareness and the refreshed Smart Successful Scotland places an increased focus on sustainability.

Are museums too prescriptive in their opening hours? Tourist Information Centres often close at 5pm and on Bank Holidays...

- extended opening hours create staffing and resource issues but these might be worth tackling if doing so would allow some museums and galleries to engage more with their potential audiences
- the retail sector has made major changes over the past few years, which would previously have been unthinkable but which are now accepted as the norm.
- one speaker suggested that thought could be given to locating Tourist Information Centres at major attractions.

Tourism projections are based on positive economic predictions but much of current spending is credit based.

- predictions are based on internationally-accepted data
- tourism goals are more conservative than some believe they should be.

How can we help to develop overseas markets?

- VisitScotland runs seminars looking at how to capitalise on emerging markets. You are welcome to participate.

Useful Contacts

ASVA

Argyll's Lodging
Castle Wynd
Stirling FK8 1EG
Tel: 01786 475152
www.asva.co.uk

Scotexchange

VisitScotland
23 Ravelston Terrace
Edinburgh EH4 3TP
www.scotexchange.net

Pride and Passion

1 St Colme Street
Edinburgh EH3 6AA
Tel: 0131 220 843
www.scotexchange.net/business_development/pride_and_passion.htm

Scottish Enterprise

150 Broomielaw
Atlantic Quay
Glasgow G2 8LU
Tel: 0845 607 8787 or 0141 228 2000
www.scottish-enterprise.com

Scottish Tourism Forum

29 Drumsheugh Gardens
Edinburgh EH3 7RN
Tel: 0131 220 6321
www.stforum.co.uk

VisitScotland

23 Ravelston Terrace
Edinburgh EH4 3TP
Tel: 0131 332 2433
www.visitscotland.com

Scottish Museums Council

Scottish Museums Council
20-22 Torphichen Street
Edinburgh EH3 8JB

Tel (switchboard): 0131 229 7465
Tel (information service): 0131 538 7435
Fax: 0131 229 2728

E-mail: inform@scottishmuseums.org.uk
Web: www.scottishmuseums.org.uk

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