Museums, Galleries and Tourism
Realising the True Impact

SCOTTISH
MUSEUMS
COUNCIL

Realising the True Impact

of Museums and Galleries in Scottish Tourism: Full Report

Here we are
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Final Report
Realising the true impact of Museums and Galleries in Scottish Tourism

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Terms

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Abbreviations

ATB	*Area Tourist Board*
GOMA	*Gallery of Modern Art (Glasgow)*
HLF	*National Lottery Fund*
HS	*Historic Scotland*
MC	*Moffat Centre*
Museums	*Refers to 'Museums and Art Galleries'*
MA	*Museums Association*
MLA	*Museums, Libraries and Archives Council*
NGS	*National Galleries of Scotland*
NMS	*National Museums of Scotland*
NTS	*National Trust for Scotland*
Scot Exec	*Scottish Executive*
SCF	*Strategic Change Fund*
SMC	*Scottish Museums Council*
SNA	*A Collective Insight: Scotland's National Audit*
Stats	*Statistics*
UNESCO	*United Nations Educational, Scientific and Cultural Organisation*
VAM	*Visitor Attraction Monitor – VisitScotland's annual Scottish Visitor Attraction Survey*

EXECUTIVE SUMMARY

Museums and Galleries in Scotland are a central part of the nation's tourism product as visitor attractions and in interpreting the nation's cultural history and built heritage landscape. This report, *Realising the true impact of Museums and Galleries in Scottish Tourism,* examines more thoroughly the contribution museums and galleries make to tourism and the cultural infrastructure of Scotland. Quantitative data used in this report is drawn primarily from information gathered for the 2003 Visitor Attraction Monitor (VAM) commissioned and prepared for VisitScotland

Museums as Visitor Attractions (2003)

In 2003 there were **986** visitor attractions in Scotland, **437** of which contained museum related collections. Therefore, in that year **museums accounted for 44% of visitor attractions**

The following chart demonstrates the centrality of visitor activity. Museums account for 37% of visits to attractions

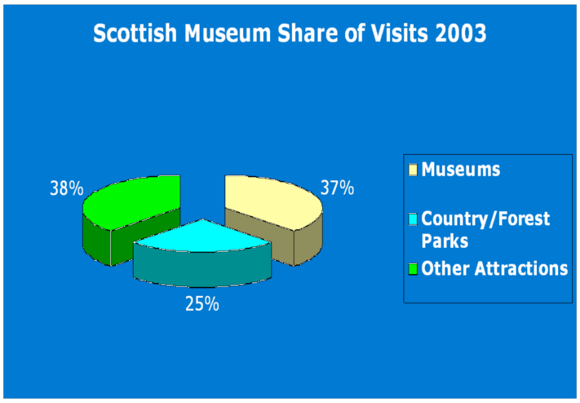


Figure 1: Museum Share of Visits

Museums in the Context of the Cultural Sector

Museums are at the centre of the Scottish cultural sector yet there is no clear definition of the cultural sector so it is a futile task attempting to measure the performance of a sector that is ill-defined. According to the National Cultural Strategy for Scotland the sector is all encompassing to include performing arts, architecture, cultural industries, creative industries, fashion, design, film, media, radio, television etc. Those within the sector do not operate on a level playing field being a mix of formal businesses and services as well as those that operate informally. It is also difficult to put a monetary value on impacts when there is lack of robust documented data, particularly when so many organisations within the cultural sector operate informally.

Museums are a central element of the cultural sector and reflect widespread interest in conserving and interpreting the nation's wealth of cultural resources. The Scottish National Museum Audit published in July 2002, identified the scale and scope of museum collections across the country in terms of their international, national and local significance. The sector plays a **key role in community learning and development** through facilitating community ownership of cultural resources and active involvement in cultural activities. **Museums also lie at the heart of tourism** and defining them as visitor attractions places more emphasis on their business context and the quality of visitor experience.

Museums as National Icons

Tourists' perception of Scotland confirmed the importance placed on the Scottish landscape, built heritage and cultural heritage. These are the central images that define perceptions of the nation. **Images of museums and galleries play a vital role in developing Scotland as a 'must visit' destination for visitors and tourists.**

According to the Scottish visitor opinion survey published by VisitScotland visiting museums and heritage was consistently among the top 3 activities. Over 70% of the vast majority of inbound visitors reported an interest in Scottish heritage and culture.

Museum architecture defines the landscape and establishes the country's unique identity. Museums as iconic period buildings add considerably to the interpretation of the collections they contain.

The iconic representation of Charles Rennie Mackintosh through architecture and museums and Robert Burns through built heritage are critical in marketing Scotland. There are a range of niche markets that depend on museum involvement such as **ancestral and event tourism**. Nearly 10 million people in America claim Scottish heritage, making them the eighth largest ethnic group in the USA. The internationalisation of Scottish culture is reflected in a worldwide interest in the achievements and events that celebrate the life and work of cultural ambassadors like Robert Burns, Charles Rennie Mackintosh and Scott of the Antarctic.

Location and Centrality of Urban Attractions

Almost **62% of museums** were located in urban areas and **secured 82% of visits to all museums**. Across Scotland the importance of museums as visitor attractions is clearly evident.

Free admission museums dominate most regions and free admission attractions achieve a higher average percentage of visits when compared to museums with paid admission.

The visitor profile for museums reflects that for all attractions:

- Museums 74.5% Adults 25.5% Children
- All Attractions 74.7% Adults 25.3% Children

Notably:

- School visits account for almost 4% of all visits to museums at 280,350 school visits
- Almost 64% of school visits were made to paid admission museums

Museums are a critical local/cultural facility as 52.7% of museum visitors are defined as local visitors,

Employment in Museums

- 50% of museum staff are volunteers involved in various tasks and time commitments
- 25% are full time permanent paid employees
- 14% are part time permanent paid employees
- 3% are Full Time paid staff on Seasonal/Temporary contracts
- Almost 9% part time paid staff on Seasonal/Temporary contracts

There is also a major hidden source of employment generated by Museums:

- Temporary members of staff on short term contracts

- Freelancers and consultants used for specialist conservation or major projects
- Artists and benefactors who provide or interpret exhibits for museum related exhibitions
- Suppliers from the private sector such as those employed in providing museum products for exhibitions, retail, catering etc.

Museums and Galleries are at the heart of tourism and are a foundation for the iconic representation of the nation and its people. This vital but disparate set of cultural resources are for the first time recognised as a central cultural resource at the heart of visitor experiences in urban, rural and coastal regions.

This represents an important starting point providing common terminology for research in the sector, focussing around common data and this process has helped to scope the scale of Museums and Galleries and their impact on the visitor experience in Scotland. **This has identified the critical mass of cultural resources that are ignored at our peril.**

This report helps explain why a monetary value that measures the true impact of museums on Scottish tourism and its cultural economy is problematic. The reason for this is lack of awareness concerning the scale of operations and extent of which direct and indirect benefits tend to be ignored or taken for granted. **The range of museum collections is immensely diverse and the full extent of museum activities across the country is neither documented nor appreciated.**

Of critical importance is the financial instability experienced within the sector at a time when museums are expected to become more accountable to a wider section of the public as well as contribute significantly towards local economic priorities which include their role in tourism.

1 PROJECT OUTLINE

1.1 Background

On April 22nd 2004 the Scottish parliament announced

'a review of culture, which places a citizen's rights to cultural access at the heart of public policy'.

It also announced the establishment of the Cultural Commission whose remit was to undertake a thorough review of culture in Scotland and to decide on a framework for its support in the future. In order to do this effectively the Commission intended to work in close partnership with the cultural sectors. These cultural facilities are defined in their broadest sense to include museums and art galleries, libraries, performing and creative arts and the creative industries.

On 4th November 2004 the Cultural Commission presented its interim report. The report set out the Commission's remit, the scope of which is very broad. The Commission acknowledged the enthusiasm and dedication of museum and gallery staff. The first three phases of consultation with museums and galleries, other cultural providers and stakeholders e.g. education providers will begin under the following three phases:

- Cultural rights and commission remit – August and September 2004.
- Developing talent (November and December 2004)
- Realising potential (February and March 2005)

A Museum and Galleries Working Group was formed to enable museums and galleries to develop within a transformed cultural framework to achieve its long-term partnership vision by 2030. This vision serves to benefit people of all ages, widen access, raise awareness and ownership of cultural resources, to develop talent and to instil a sense of Scottish identity. It also serves to benefit tourists and has a role in promoting Scotland as a tourist destination (SMC 2004e). SMC in partnership with VisitScotland and Scottish Enterprise co-ordinated a museum conference entitled 'Realising the Potential'. The conference was held in the Glasgow Lighthouse on March 14th 2005 and highlighted the early findings from this study.

1.2 Project Scope

This report will evaluate more thoroughly the contribution museums and galleries make to tourism and the cultural infrastructure of Scotland. This is done by placing museums and galleries in the context of life-long learning and by examining the relationship between tourism and museums and galleries. For example it is rarely documented or evaluated that many leading urban locations museums and galleries are used as key cultural assets in the iconic and visual promotion of destinations and in developing business enterprise. Indeed such venues as visitor attractions are central to the tourism product offer.

The research will consider qualitatively how central museums and galleries are to the tourist/visitor appeal of Scotland and the extent to which they fulfil a wider role in the cultural fabric of Scotland in 2005 and beyond.

2 METHODOLOGY

2.1 Approach

The approach will consider the aims and objectives from a strategic tourism perspective. The research will be guided by the content of *A Collective Insight: Scotland's National Audit* (SNA) which was launched by the Scottish Museums Council in July 2002. This pioneering review uses data gathered during 2001.

The quality of data will be of critical importance so it will be drawn from as reliable and up to date sources as possible.

2.2 Method of Gathering Information

Research will be desk based and will draw from a range of secondary sources including information gathered for the SNA report. Further sources of information will include:

- Quantitative museum data drawn from the 2003 Visitor Attraction Monitor (VAM: VisitScotland's annual visitor attraction survey). Data from this source will update information provided for the SNA but will be restricted to those visitor attractions who responded to the VAM survey. There is no comprehensive statistical information more recent than data used to inform the findings of the SNA, even those undertaken recently. There is little doubt that the most up to date visitor related information representing museums and art galleries is the VAM which is undertaken by the Moffat Centre on behalf of VisitScotland. This was reported in a survey undertaken by PLB Consulting Ltd on behalf of the Museums, Libraries and Archives in 2004. Data used in this report was dominated by data gathered between 1999 and 2001. However, a British wide survey was conducted on behalf of MLA by MORI between January and February 2004. This survey involved more than 4,000 responses from members of the general public who were intercepted at locations across Great Britain. The results from this survey provide some generic information not covered in the VAM such as the occupational profile of visitors, why people visit museums etc. Although this information will be drawn on within this report the validity of this research in the Scottish context has limitations. The number of responses representing Scotland is not specified and some of the results include small sample sizes which suggest findings may not adequately represent the Scottish experience (MLA/MORI 2004).

This research highlights the following:

- people living in Scotland are least likely to have visited a museum in 2003 than those living elsewhere in the UK (MLA/MORI 2004).
- Most museum visits are undertaken by people from ABC1 households
- 49% tend to visit when there is a special exhibition
- 48% tend to visit museums when on holiday or on a short break
- 7% use museums and galleries just to use their catering, or retail services

Data gathered for the VAM represents museums and galleries which are open to the general public without prior booking. These include those that have membership with the SMC, those included in the SNA report (some were not SMC members) and those included in the Moffat Centre's (MC) visitor attraction data base. However, it **excludes** organisations that the SNA acknowledged cared for collections but which were either not open to the public or had restricted access. These included museum and gallery stores, or collections held by universities which are used for teaching purposes.

In 2003 there were **986 visitor attractions** recorded in the MC visitor attraction data base. These included **437 museums and art galleries,** which accounted for **44%** of the total population of visitor attractions.

Museums are therefore the most important visitor attraction sector in Scotland by volume and are a vital element of the tourism product of Scotland.

Survey Status 2003	No.	%
completed	***269***	***61.6***
Cannot	7	*1.6*
does not want to	2	*0.5*
not an attraction	5	*1.1*
permanently closed	3	*0.7*
returned	1	*0.2*
temporarily closed	1	*0.2*
no data	***149***	***34.1***
Total	**437**	***100.0***

Table 2.1: Museum Sample

The 149 museum operators who did not provide data included those who were unwilling or unable to provide it. Reasons included; no time to complete survey, no records were kept of visitor information or the operator felt the aims of the survey was not relevant to their organisation.

Some **269** museum organisations provided data for year **2003** with **262** providing visitor figures for **years 2002 and 2003** which was used to demonstrate year on year visitor trends.

- Qualitative information will be drawn from a range of sources to include:

  - Academic and appropriate stakeholder publications, the Museums Year Book, reports etc
  - Appropriate policy documents including those sourced from the Scottish Executive, Scottish Museums Council etc.

- Using case studies to illustrate reasoning:

Museums and Galleries in Scotland are a key part of the nation's tourism product as visitor attractions and in interpreting the nation's cultural history and built heritage landscape. In order to justify and demonstrate this claim museum case study examples will be used throughout this report. Case study information will be accessed from a range of sources including qualitative information provided by operators for the 2003 Visitor Attraction Monitor, museum and gallery websites, other online sources of local and national tourism marketing etc.

3 DEFINING THE CULTURAL SECTOR

At the outset it is important to provide a definition of the cultural sector and to position museums within it. This section raises the issues that surround the mesh of confusion this definitional task has become embroiled within. Not least the confused association between the 'cultural sector', the 'cultural industries' and the 'creative industries'. The term 'industry' confuses further when defining the sector and implies 'culture' has a strong association with commercial enterprise. Yet a dominant segment of the sector are not for profit organisations that nurture public service ideals. For example, like museums, their primary role is to preserve, interpret culture and creatively empower and engage excluded people in a range of cultural activities. This is critical when considering the importance being afforded to 'culture' in the development of local, national and international economies and societies.

There is no doubt that an evolutionary process is at play which suggests a more democratic and commercialised approach to defining and interpreting culture to explain the diverse lifestyles, language, behaviour, values and heritage of people and groups of people and nations. Although culture remains within the social policy agenda and public service provision, more policy priorities are focussing on the **socio-economic benefits of advancing cultural education**. These include:

- establishing *better citizens* with a stronger sense of pride and ownership of culture through 'all inclusive' active involvement in cultural learning which includes museum learning activities;
- realising the potential of *citizens as tourism ambassadors* to transmit relevant knowledge that would help visitors and tourists access and navigate local cultural activities more easily;
- raising the quality of the labour market through work, education and volunteering related cultural experiences which inspire creativity, develop existing skills and build confidence;
- maximising the effectiveness of existing cultural services e.g. developing quality of service and widening access to culture while achieving financial self-sufficiency;
- commercialisation of culture through the production of cultural goods, developing commercial enterprise e.g. performing arts, creative industries and other cultural products and services such as catering and retail facilities;
- contributing towards global harmony and world peace through the interpretation of world cultural heritage;
- contribution towards improving the built environment and infrastructure for regeneration purposes.

3.1 The Impact of Globalisation

In order to provide a harmonised measure of cultural activity from a global perspective the United Nations Educational, Scientific and Cultural Organisation (UNESCO) created their framework for cultural statistics. According to this the cultural sector includes a range of cultural activities that define a nation's *cultural diversity, freedom of expression and economic development*. They include:

- world heritage
- tangible and intangible heritage
- the cultural industries (includes publishing, music, audiovisual technology, electronics video games and the internet).
- intercultural dialogue
- cultural diversity
- normative action
- arts and creativity
- museums
- cultural tourism

Governments and organisations compiling policy and those involved in undertaking research on behalf of the cultural sector tend to consider the concept of culture in its broadest terms.

3.2 The Scottish Cultural Strategy

Within Scotland's National Cultural Strategy a broad approach to defining culture is applied. This includes a vast range of cultural activities that come under the umbrella of the creative industries which comprise of….

> *architecture, advertising, arts and cultural Industries, design - including fashion, design and crafts, - film, interactive leisure software - computer games, consumer packaged software, - music, new media, publishing, radio and television, creative and performing arts, film and media.* (Scottish Executive 1999).

Other organisations within the sector include; built and natural landscape heritage, museums, art galleries, libraries, archives, national festivals and sporting events.

- Within the strategy the Scottish Executive stressed a commitment to facilitate wider access to museums and galleries while developing more programmes for younger people.

- The strategy highlights the importance of developing and forging closer links between cultural organisations.

- Case study examples tend to highlight projects involving the creative arts with little emphasis on museum case examples. However, it does recognise that museums and galleries make:

  an important contribution to education, scholarship, citizenship, social inclusion and tourism.

This approach considers the value of the museum sector in cultural tourism and their public service role in developing people and their more commercialised role in developing economies. This is critical when considering the economic and social impact of museums and galleries and the extent of their role of which tourism appears to play a small part.

3.3 The Lifelong Learning Strategy for Scotland

The Life Long Learning Strategy for Scotland supports the objectives of Scotland's National Cultural Strategy with the aim of building better communities in Scotland. The Scottish Executive have undertaken a rash of community learning reviews looking at the delivery of adult learning, youth services, health, education and social services with a view to modernise, improve services and widen community access to learning opportunities.

Local Government in Scotland has responded to these priorities through a range of policy objectives and through organisational restructuring of culture and leisure services. Change has involved more emphasis on partnership working between public services and the private and voluntary sectors. In the process museums, like other public service providers, have become more accountable to establish links and work more closely with other service providers.

The SMC seeks to address the needs of the Scottish Executive's 5 year vision to modernise community education as recommended in both their Lifelong Learning Strategy for Scotland, and their Community Regeneration Statement Better communities in Scotland: Closing the gap (2002). A key area of community learning is the development of people through active involvement in cultural activities.

3.4 The Dilemma for Research

There is no coherent policy which clearly defines culture. An all encompassing approach that pulls in the vast range of cultural activities involved within the cultural sector is problematic when no clear definition exists. Added to this there are **three main problems** that arise when trying to statistically measure the impact of the cultural sector or segments within it. These are:

- deciding what organisations qualify
- the quality of information these organisations record and are able to provide and
- the limits of estimating global calculations when organisations are so diverse in terms of ownership, mission, expertise and resources.

These limitations certainly apply to the museum and gallery sector and key methodological difficulties include:

- The Quality of information and information gaps
    - A significant number of individuals and organisations within the cultural sector operate informally or have ineffective methods of recording information hence the quality of information is significantly compromised.
    - Many impacts remain unexplored because they cannot be measured, are often 'taken for granted' or may have a knock on effect on other sectors of the economy. These include issues like the development of people through volunteering or community learning programmes that target disadvantaged groups
    - Quality information may actually exist but access to it may be denied or compromised. For example, several people may hold the range of information requested within a museum study questionnaire. Lack of time and resources results in non-returns, partial survey completions, or the provision of inaccurate information.
    - Some individuals consider the organisation they represent is not relevant and do not give priority to completing survey questionnaires.
    - Statistics drawn from a variety of sources may involve information gathered using different methodologies.

- The provision of sectoral estimates:
    - Lack of clear definition is certainly a major stumbling block when providing performance estimates for the cultural sector even when it is applied only to the museum and gallery elements.
    - The cultural sector does not operate within a level playing field. This is reflected in the diversity of organisations contained within the cultural sector and within the museums segment.
    - Organisational priorities may not be compatible and impact may not be effectively measured.

There is little economic impact related research that isolates the performance of the Scottish museum sector from other cultural related services. Cultural statistics used to represent the cultural sector tend to be all encompassing and represent a mix of commercial and not-for-profit organisations that have little coherence in terms of their mission and operational priorities. Also the experience of many of the organisations involve lack of robust data gathering and record keeping which must compromise the quality of statistical outcomes.

Researchers involved in studying the social and economic impact of the cultural sector have not always provided consistent sectoral definitions. For example, a study that set out to estimate **the economic impact of culture in Scotland** provided a comprehensive section explaining the problems of defining the sector (Dunlop et al 2004).

This report’s definition of culture focussed primarily on the arts to include a broad view of arts activities involving the performing and creative arts as well as the creative industries.

However, the coverage of museums and art galleries contained within this report relied significantly on the SNA report. There were two main problems with this:

- Firstly, significant changes within the museum sector meant that the SNA was outdated.

   - For example the Royal Museum and Museum of Scotland no longer charge for admission and some major developments had resulted in some changes in investment and visitor flows.

- More seriously the authors excluded organisations included in the SNA report because they argued that they were not museum organisations.

These involved sites and properties managed by Historic Scotland (HS) and the National Trust for Scotland (NTS). Although both have a strong association with natural and built heritage some do contain significant museum related collections and NTS is an associate member of the SMC. The NTS has six organisations recognised as museums through the MLA registration and accreditation scheme. HS manages two sites recognised as museums while others contain independently managed museum collections. These include military museums in both Edinburgh Castle and Stirling Castle. For the purposes of VisitScotland research and to prevent double counting, separate visit figures are not recorded for museums located within both castles.

This turns the research back to an age-old problem which argues that heritage relates to the historic environment, i.e. buildings and landscape while culture refers to historical collections of natural and manmade artefacts. On the other hand most of Scotland's museum and gallery collections are contained within flagship or less significant civic buildings or structures which enhance the cultural landscape. To varying degrees it can be interpreted that such packaging adds to the impact of interpreting museums and gallery collections and to the quality of the visitor's experience.

3.5 Defining Museums

There is no clear definition that robustly defines the cultural sector with similar issues emerging when trying to isolate the museum sector.

In 1998 the Museums Association reviewed its definition of a museum to emphasise museums should demonstrate that they are just as accountable to their visitors as they are to their collections.

> *'Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens which they hold in trust for society.'* (UK Museums Association 1998)

This definition suggests community ownership of museums and the accountability of museum staff to facilitate enjoyable active learning experiences for their visitors. Within this definition of a museum benefits can be as easily applied to local citizens as they can to day-trippers and tourists hence the role of museums in cultural tourism is easily established.

Indeed museums lie at the heart of tourism and defining them as visitor attractions places more emphasis on their business context than their duty as a public service:

> *'…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; rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc.'* (VisitScotland 2003)

Having so many competing demands has led to some museums experiencing an identity crisis. For example, for VAM research purposes, some museum operators opted to have their museum organisation listed under another attraction category such as Historic House, Interpretation Visitor Centre, etc. These include Tenement House, Pollok House, Provand's Lordship, Weaver's Cottage, Duff House Gallery, Paxton House, Laurieston Castle and Sma' Shott Cottages, all being recorded under Historic House category for VAM purposes, while New Lanark Visitor Centre, Verdant Works, Creetown Museum, Discovery Point and the Tall Ship at Glasgow Harbour opted for Interpretation Visitor Centre.

The common factor that entitles museum status is the local, national or international relevance of their collection which is a critical factor in cultural education and interpretation. However, there exists some confusion concerning what constitutes a collection and what organisations can justly be labelled as a museum.

As part of the modernisation process, museum policy initiatives and various studies have moved goal posts to pull in organisations that hold collections which traditionally would not be recognised within the museum sector. These include science centres, craft industries, botanic gardens, interpretation centres, and historic properties some of which hold significant cultural collections. For example, the Royal Botanic Gardens has the largest natural science collection in Scotland and the third largest collection of archives. ICOM and the Scottish Museums Council (for the purpose of SNA) recognise botanical collections within the remit of museum services but the Museums Association (MA) and the Museums Libraries and Archives Council (MLA) do not (Matty 2004).

Museums offer a huge diversity of cultural products and resources that lie at the heart of local communities. However, this very diversity can make the cultural resource that is the museum and gallery sector, difficult to engage with.

The previously mentioned *economic impact of culture in Scotland* excluded HS and NTS even though the SNA included them. Although collectively only six sites and properties are recognised more contain significant collections. These include collections of fine art, archaeological or other authentic artefacts that provide a strong element of cultural interpretation as well as other independent museum collections that are located onsite. These include collections which are unique to an area such as the fully furnished Lewis Black House excavation and neighbouring 1920s crofthouse at Arnol.

However, the SNA has helped significantly in providing a clear indication of the rich range of collections which can justly be defined as museum collections. These include; archaeology, archives including herbarium, coins and medals, costume and textiles, culture, decorative and applied art, domestic life, fine art, health, history of science, industry and commerce, maritime, natural sciences including herbarium, photography, society, sport and leisure, transport, warfare and defence weapons and accessories, and world culture.

The key issues this definitional issue has raised concerns the wide-ranging, often competing demands being placed on museums. The fact that non-national museums are particularly 'resource starved' suggests the potential for them to effectively support these multiple priorities is challenging.

3.6 Museums and Quality Standards

Since 1998 a rash of policy initiatives undertaken by the Department of Culture, Media, and Sport targeted museums to widen access and operate more effectively. By year 2000 museums were pulled into Best Value agendas to modernise local government and improve service provision. National policy in the UK and Scotland facilitated by central and regional museum associations makes museums more accountable to act as centres of social change, learning for all and economic regeneration (Matty 2004).

Scotland was ahead of England in advancing Best Value management with Glasgow being one of the first authorities to undertake a Best Value review of its museum and gallery service, employment and supporting service facilities. In this way priorities were set within a strategic management framework.

In 2004 the Museums association published its Accreditation Standard: the Accreditation Scheme for Museums in the United Kingdom. This was a revised version of the original Museums Registration Scheme which was first launched in 1988.

It is important to consider all these aspects when evaluating the performance of museums as visitor attractions.

3.7 Scope of Museum Diversity and Delivery

The extensive diversity of museum provision across Scotland reflects widespread interest in conserving and interpreting the nation's wealth of cultural resources.

The majority of museums in the country are non-nationals with its independent sector realising the highest number of museums per capita in the UK.

4 MUSEUMS AND SOCIAL IDENTITY

Museums have an important role in defining social identity. Identity theory is grounded in psychology and stresses the importance in developing an individual's sense of being as a factor in establishing a bond of belonging with the collective for example, as a member of a nation, specific community group etc.

During the 1950s psychoanalyst Erik Erikson emphasized the importance of cultural history education in facilitating an individuals search for 'self identity'. He explained that regardless of their social status, an individual can find their 'ego identity' through an understanding of major trends in history. He studied young people within the context of social development and periods of major change e.g. the impact on society of achievements and disturbances brought about by rapid industrialisation.

A decade later Erikson was the first to coin the phrase, 'national identity' by claiming that nations, like individuals, needed to undergo a similar process of discovery to establish their unique identity.

From a tourism perspective Scotland's national identity can be expressed in a range of images related to landscape, art-forms, society, myth and legend. The preservation of the history of Scottish people, their lives and their work furthers the interpretation of national identity.

Establishing a strong national identity can enrich Scotland's own cultural context for the benefit of its citizens and visitors. Museums have a significant opportunity to develop cultural interpretation of the immense wealth and variety which exists within collections across Scotland.

This section only begins to debate this important area by reference to examples and case analysis.

4.1 National Identity Scottish Landscape and Built Environment

Museums' reputation in positioning Britain's international status is routed in the 18th and 19th centuries. Scotland's national collections followed the same principles as British flagship museums. They had a significant role to play in inspiring a common patriotic consciousness among society and more recently the role of museums has facilitated 'the pursuit of meanings and identities' by interpreting a range of objects that define a much broader view of cultural development. A major turning point for Scotland followed a rush of nationalism culminating in 1999 with the establishment of the new Scottish Parliament.

In 1981, the secretary of state announced the merger of the Royal Scottish Museum and the National Museum of Antiquities of Scotland. The Royal Museum and Museum of Scotland opened in 1999 *'proclaiming its national identity'*. It was to be more than an object repository by *'contributing to the interpretation of Scottish culture to reflect the nation as a whole'* (NMS 2005).

As part of this modernisation process the human factor has become very important in museum interpretation for this new pioneering development.

> *'the story of a country that has a unique place in the hearts of people throughout the world. presents for the first time the story of Scotland - its land, its people and culture - through the rich national collections. Here you will discover everything from some of the nation's most precious treasures to everyday objects that throw light on Scotland through the ages'* (NMS 2005).

In this way the Museum of Scotland would define all things Scottish as part of the national identity. The imposing architecture and historic location of this new flagship museum is also important as

…a striking landmark in Edinburgh's historic Old Town (NMS 2005) http://www.nms.ac.uk/scotland/index.asp

Source: NMS 2005

This reaffirms the key finding of this report that museums make a considerable contribution towards Scotland's landscape and built heritage. **Most museums and galleries are located within period buildings that range from grand civic buildings down to more modest dwellings. These buildings and the landscape that surrounds them often add considerably to the interpretation of the objects they contain.** The following examples demonstrate the role of museum structures, their surroundings and people have in developing object interpretation.

National Defence – A unique position for Military Museums

The Royal Scots and the Argyll and Sutherland Highlanders Regimental Museums are both located within the fortifications of Edinburgh Castle and Stirling Castle which both sit on the crown of extinct volcanic rocks. The benefits of this type of location advances the military theme and the interpretation of phases of military history. More importantly these free admission attractions realise significant marketing benefits being hosted by two of the most visited paid admission tourist attractions in Scotland.

Rural Heritage – Central to the interpretation of the country

The Highland Folk Museum based in Kingussie and Newtonmore recreates 400 years of Highland clan and croft heritage by reconstructing the buildings and village life in an appropriate rural setting. As well as landscape and buildings people dressed in period costume add to the interpretation theme of its major collections of furniture, machinery and implements connected with the 18th to 20th century Highland countryside.

Shipbuilding and National Maritime – Interpreting Scotland's Past

The SV Glenlee and RRS Discovery are both berthed nearby where they were originally launched from the River Clyde in 1896 and the River Tay in 1901 respectively. These artefacts tell different stories about people and interpret Scotland's role in world trade, travel, exploration and discovery.

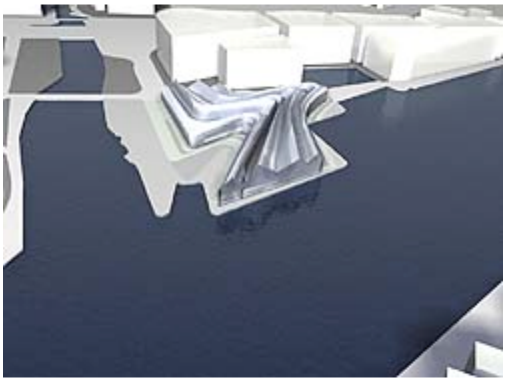
For local people and tourists this provides a package of experiences that further interpret Scotland's 'national identity'.

Contribution to Regeneration

The restoration and development of industrial landscapes as museums has had a considerable impact on interpreting the nation's industrial heritage, particularly Scotland's international superiority in heavy industry during the 18th and 19th centuries. These include the conservation of the ironworks at Summerlee Heritage Park in Monklands and the renovated Victorian colliery of the National Mining Museum at Newtongrange.

Current museum developments have considerable role in more recent regeneration programmes.

The **Regeneration of Period Architecture** outside and within Kelvingrove museum and art gallery has involved stripping away cladding to reveal internal Victorian architecture and updating facilities which do not meet current visitor expectations.



Proposed Riverside Museum

The proposed New Riverside museum will contribute to the much wider riverside programme to **regenerate the River Clyde**. The new museum is set to relocate and add to the existing collection and interpretation of the Museum of Transport, currently located at Kelvin Hall.

The architecture will have a significant impact on the riverside landscape and the iconic representation of Glasgow in tourism terms.

4.2 Scottish Personalities and National Identity

Museum and gallery development owes much to famous Scottish personalities as benefactors and contributors of museum buildings, a range of museum collections and whose lives and work have influenced and humanised collection interpretation. These include:

- **Thomas and Peter Coats,** Paisley born textile industrialists, are responsible for shaping Victorian architecture peppered around Paisley town centre, including its Museum and Gallery. The museum has a strong social history focus interwoven with the history of thread and textile manufacture and design. Using the influence from Asia, Coats developed the Paisley Pattern and Paisley Shawl. Both have brought Paisley international renown and continue to influence textile design and fashion internationally.

Paisley Shawl in Paisley Museum and Art Galleries Shop. Museum has ownership of the Paisley design which they license to local textile manufacturer who produces replicas for sale internationally.

- **Charles Rennie Mackintosh** architect and artist whose work is reflected in a range of buildings in and around the periphery of Glasgow and in which many of his art designs are exhibited.

Charles Rennie Mackintosh designs continue to influence the work of contemporary architects, artists and designers. In the Autumn of 2006 Glasgow City Council is celebrating Charles Rennie Mackintosh within its Scotland with Style Campaign and is submitting an ERDF bid to support marketing (Museums Journal February 2005).

- **Robert Burns,** colourful poet, writer and political activist whose life and work are significantly important on an international level. His influence in museum interpretation focuses on various museum related sites across Scotland, particularly in and around his birthplace in Ayrshire.

Burns has a strong international brand enhanced by an international band of Burns enthusiasts including members of Burns and Caledonian Societies, and a range of enterprise activities including major events such as Burns suppers, literary events, and festivals like Hogmanay and the forthcoming 2009 Year of Burns homecoming.

- **Captain Robert Falcon Scott**, his ship Discovery and Antarctic expeditions from 1901-04 are internationally renowned and central to the interpretation of Discovery's voyages throughout the 20th Century. Discovery Point at Dundee has international links with other museums located in countries that were also involved in polar exploration such as Russia's Arctic and Antarctic museum in St Petersburg.

4.3 Community Identities and Genealogy

Scotland is renowned as a nation with a strong element of cultural diversity, the issue of which has been tackled robustly, particularly projects undertaken in Glasgow through the city's Open Museum. Glasgow has also led the way on several temporary exhibitions such as GOMAs Sanctuary Project which looked at issues affecting asylum seekers and refugees. GOMA also did some groundbreaking work with their Nu exhibition interpreting contemporary youth culture through portrait and video arts which pay tribute to the Goth culture.

In July 2004 the Burrell Collection hosted a £150K exhibition entitled One Million Days in China which covered 4,500 years of Chinese history. The exhibition included a range of exhibits including oriental pottery and porcelains, oral history accounts representing Glasgow's Chinese community.

One Million Days in China: Source the Burrell Collection

The exhibition achieved record levels of visitation by recording 170,000 visits in its first six months.

One growing niche market within cultural tourism concerns the desire to preserve cultural links with family history, reconnect with homeland, establish birthright roots etc.

Scotland has experienced centuries of migration and emigration from the Highlands and Islands to destinations within the nation and across the globe. Nearly 10 million people in America claim Scottish heritage, making them the eighth largest ethnic group in the country (MacMillan 2005). Museums have the potential to harness significant international links such as Scottish-North American links through international organisations like the American-Scottish Foundation in New York.

Over recent years museums have been working more closely with libraries and archives with many having their own reference collection. Some community museums provide documentary information to enable visitors to trace their Scottish routes, learn about their family history and find out about community life as it was experienced by their ancestors.

Source: Clan Donald Library and Family History, Clan Donald Centre, Museum of the Isles, Armadale Skye.

An initiative encouraging partnership working between national museums and community museums is set to involve people in a broad range of activities across the UK. Their Past Your Future is the Imperial War Museum's current touring exhibition interpreting the legacy of the Second World War. This new touring exhibition is based around the themes of commemoration, conflict and citizenship and explores the lasting impact of the Second World War on people and places across the UK. Funded by the Big Lottery Fund this initiative runs until March 2006 with museums across Scotland acting as host to the exhibition throughout 2005. Museum venues include locations in West Dunbartonshire, Aberdeen City and Aberdeenshire, South Lanarkshire, The Highlands, Argyll and Bute and Clackmannanshire.

Ancestor tourism has particular significance for Scotland, with VisitScotland recognising Scotland's links with North America and Canada. The following case study provides an insight into this important aspect of cultural tourism and how small communities have benefited from partnership working between museums and tourism organisations.

Case Analysis: The Orkney Homecoming and the centrality of Museums

This small scale marketing campaign demonstrated the huge potential the link to the islands of Scotland through heritage and culture. Fundamentally, it was a marketing campaign conducted by the Orkney Tourist Board which built on the Canadian Connection between Orkney and Manitoba.

The historic links between Orkney and the Hudson Bay Company and the ethnic links with the aboriginal population and the Orcadians was the basis of a homecoming event for 2000. A strong emotional appeal built on authenticity and ancestral links was the key to developing interest and building appeal.

Although only 250 people were attracted to this millennium event the economic impact was considerable. Links, profile building, emotional attachment and generic destination awareness were all triggered by this highly cost effective marketing campaign. This led to a Treaty of Friendship between Orkney and Manitoba (linking 20,000 people and 1 m in Manitoba) and has triggered long term benefits through genealogical heritage.

Key lessons learned included:

- The **centrality of integrated tourism and museum offers** which from the very beginning acted as a powerful catalyst to the event.
- The **need to view museums as embedded in the landscape and the community**
- The centrality of narrative representation in **cultural resources**
- The **huge potential to forge international linkages**
- The **importance of community engagement through tourism** - the local users of museums increased rapidly

5 SCOTTISH TOURISM

Since 1999 Scottish tourism has experienced several knocks such as the Foot and Mouth epidemic of 2001, the terrorist attack of September 11th in New York and hostilities in Iraq. Tourism statistics for 2003 show evidence of gradual recovery.

- In **2002**, tourism supported around **9%** of all employment.
- In **2003** over **18 million** tourists took overnight trips to Scotland.

The **holiday market** accounted for **66% of tourists** while 9% were visiting friends and relatives. Business tourism accounted for **22%** of trips while the remainder involved trips for other reasons.

The high cost of accommodation contributes to Scotland's reputation of being an expensive destination. In 2003 expenditure on **accommodation** and packages including accommodation accounted for **34%** of **total tourism expenditure of £4.4billion**. **Eating, drinking, travel and general shopping** accounted for a further **45%**, while **entertainment** and **buying clothes** accounted for **7%** and **8%** respectively.

5.1 Origin of Tourists, Overnight Stays and Expenditure

This information is presented in the following table and shows the origin of tourists who took at least one overnight stay in Scotland.

Origin of Tourists (m)	***Trips 2003***	***Nights 2003 (m)***	***Expenditure 2003 (£m)***
Scotland	8.0	26.0	1,347
England	7.8	33.4	2,079
Rest of the UK	0.7	2.6	169
Total UK Tourism	16.5	62.0	3,596
Total Overseas Tourism	1.6	14.9	839
Total	***18.1***	***76.9***	***4,435***

Table 5.1: Origin of all Tourists, Overnight Stays and Expenditure (Source: ScotExchange 2005.)

Scotland depends significantly on UK domestic tourism, particularly visitors from England.

The following table shows a breakdown of international tourism markets

Origin of International 2003

Origin of Tourists ('000)	***Trips***	***(%)***	***Nights (m)***	***(%)***	***Expenditure (£m)***	***(%)***
USA	414	26	3.3	22	228	27
Germany	175	11	1.5	10	106	13
Australia	107	7	1.2	8	49	6
Canada	88	6	1.1	7	42	5
France	87	6	0.7	5	33	4
All Other Countries	694	41	7.1	48	381	45
North America	502	32	4.4	30	270	32
Europe	764	49	6.9	46	388	46
Rest of World	299	19	3.6	24	181	22
TOTAL	***1,565***	***100***	***14.9***	***100***	***839***	***100***

Table 5.2: Origin of International tourists (Source: ScotExchange 2005.)

5.2 Regional Distribution

UK (Overseas) Tourism by Area Tourist Board

	Trips %	***Nights %***	***Expenditure %***
Aberdeen & Grampian	9 (7)	9 (5)	9 (6)
Angus & the City of Dundee	3 (3)	3 (3)	2 (3)
Argyll, The Isles, Loch Lomond, Stirling and the Trossachs	13 (13)	13 (7)	11 (7)
Ayrshire & Arran	6 (5)	7 (4)	5 (4)
Dumfries & Galloway	6 (2)	5 (1)	4 (1)
Edinburgh & Lothians	21 (51)	15 (34)	22 (33)
Greater Glasgow and Clyde Valley	18 (31)	13 (23)	17 (22)
Highlands of Scotland	14 (22)	16 (13)	14 (13)
Kingdom of Fife	4 (6)	4 (6)	3 (6)
Perthshire	5 (6)	5 (4)	5 (5)
Scottish Borders	3 (2)	2 (1)	2 (1)
Edinburgh	18 (49)	13 (21)	20 (30)
Glasgow	16 (27)	11 (11)	15 (18)

Note: Overseas tourism is expressed in brackets ().

Table 5.3: Regional Distribution of Tourists. Source: ScotExchange 2005

Edinburgh and to a lesser extent Glasgow are the most popular city destinations for both domestic and overseas tourists. The Highlands is also particularly attractive to both markets followed closely by destinations in Argyll, The Isles, Loch Lomond Stirling and the Trossachs.

5.3 Visitor Perceptions of Scotland

The following table shows attitudes towards Scotland as a destination.

Attitudes towards Scotland	**English %**	**Scottish %**	**American %**	**German %**	**French %**	**Italian %**	**Spanish %**
Beautiful scenery	94	91	96	94	90	97	95
Friendly people	82	74	85	87	77	77	86
Good place to relax	85	81	67	72	63	61	75
Interesting history/culture	**76**	**72**	**87**	**86**	**44**	**73**	**78**
Good for hiking/walking	66	62	71	79	70	46	49
Plenty to do and see	64	40	81	69	70	55	71
Slower pace of life	57	63	47	41	45	65	57
Good places to eat out	40	44	50	15	15	13	14
Local products to eat & drink	39	44	40	27	27	21	34
Good pubs	26	26	45	75	51	48	49

Table 5.4: Visitor Perceptions of Scotland Source ScotExchange 2005.

Tourists are heavily interested in Scotland's history and culture and it is a central part of the tourist experience.

5.4 Activities Undertaken on Holiday

The following table shows the most popular activities undertaken by tourists.

Activities undertaken (at all)

	UK Holiday Trips (%)	***Overseas Holiday Trips 1996 (%)***
Visiting castles, monuments, churches etc.	**39**	**83**
Hiking/Hill-walking/Rambling/ Other walking	33	39
Visiting museums, galleries, heritage centres, etc.	**29**	**58**
Swimming	21	5
Field/Nature Study	17	9
Watching performing arts (including cinema)	16	16
Golf	8	2
Visiting Theme Parks/Activity Parks	8	6
Traditional Regional Music Events	7	n/a
Fishing	6	3

Table 5.5: Activities Undertaken Source ScotExchange 2005.

Castles, monuments and churches were the most popular activities recorded by both local and overseas visitors. It is important to highlight that some castles and churches contain museum collections. For example Stirling and Edinburgh Castle have their own collections as well as collections belonging to free admission military museums which are located on their premises.

Visiting museums, galleries and heritage centres was the second most popular activity undertaken by overseas tourists and tourists visiting Scotland for at least one overnight stay. Domestic tourists recorded visiting museums as their third most popular activity (VisitScotland 2003b).

6 MUSEUMS AS VISITOR ATTRACTIONS

In 2003 there were **939** visitor attractions in Scotland that were open to the public. Within this **426** are **museums** with the remaining **513** representing **other types of attractions**.

This section focuses on the **269** (**63%**) museum organisations where operators were able and willing to provide visitor related information. The rest of the responding sample represents **401** other types of attractions achieving a **78%** response. In some cases analysis of all attractions will be included for comparison purposes.

It is important to point out that some of the organisations pulled into the analysis are categorised differently for the VAM. However, as they contain significant collections which are of national importance and were recognised as museums in the SNA they are included for consistency purposes.

Analysis within this section involving smaller sample sizes will be highlighted where appropriate.

6.1 Most Visited Museums

In 2003 the sample of **269** museums recorded **14,177,259** visits which represents **37%** of the **37,922,813** visits recorded for all **670** visitor attractions that participated in the survey for that year.

The Twenty Most Visited Museums with Paid Admission.

20 Most Visited Paid Admission Museums	**Visits 2003**
Edinburgh Castle	1,172,534
Glasgow Science Centre	416,924
Stirling Castle	385,220
Scottish Seabird Centre	157,000
Scottish Fisheries Museum	101,956
Pollok House	99,918
Culloden Visitor Centre	82,740
Almond Valley Heritage Centre	82,072
Inveraray Jail	70,764
Iona Abbey (Mull)	63,951
Discovery Point	63,776
Skara Brae	62,743
Bo'ness & Kinneil Railway	55,864
Museum of Scottish Country Life	55,601
Museum of Flight	48,113
Grampian Transport Museum	46,736
British Golf Museum	43,400
Melrose Abbey	42,774
Brodick Castle	42,439
Duff House Gallery	41,453

Note: This list excludes one museum because the operator asked that visit figures be kept confidential. Number 21 is included in its place.

Note: Edinburgh and Stirling Castle both contain museums

Table 6.1: Most Visited Paid Admission Museums

Edinburgh Castle is the only attraction that recorded over 1million visits and features each year in the top ten paid admission attractions in the UK. Edinburgh and Stirling castle contain military museums that record fewer visits. For the purposes of VisitScotland’s attraction survey, the figures for these military museums are not recorded to avoid replicating visit figures to the castle.

The Twenty Most Visited Museums which have Free Admission.

20 Most Visited Free Admission Museums	Visits 2003
Royal Botanic Garden Edinburgh	706,161
Royal Museum and Museum of Scotland	686,531
National Gallery of Scotland	434,429
Chatelherault	431,596
New Lanark Village and Visitor Centre	404,500
Museum of Transport	404,107
Gallery of Modern Art	381,298
Dundee Contemporary Arts	325,507
Dean Castle	308,833
Burns National Heritage Park	278,944
Museum of Childhood	231,885
Centre for Contemporary Arts	223,000
Burrell Collection	217,084
Glasgow Cathedral	206,589
Royal Scottish Academy Building	203,327
Aberdeen Art Gallery	187,858
St. Mungo Museum	183,133
Scottish National Gallery of Modern Art	182,281
People's Palace	181,109
Scottish National Portrait Gallery	158,078

Note: Closure in July 2003 of Kelvingrove Museum and Art Gallery eliminated it as top free admission attraction

Table 6.2: Most Visited Paid Admission Attractions

The absence of Kelvingrove Museum and Art Gallery means not only its loss as top free admission museum but as top free admission attraction for Scotland and as one of the top twenty visitor attractions in the UK.

6.2 Scale and Scope of Museum Collections

The following table shows a breakdown of museums and all attractions by their ownership.

Visits 2003 - by museum ownership

	Museums		All attractions	
Ownership	**Sample**	**Visits 2003**	**Sample**	**Visits 2003**
Charitable Trust	92	3,774,747	150	6,148,949
*Government Owned	7	894,584	31	2,562,110
Historic Scotland	17	2,132,310	69	3,033,403
Local Authority	94	5,179,449	135	14,442,690
National Trust for Scotland	20	379,692	61	1,845,893
Other	14	1,179,371	34	2,191,837
Private Limited Company	4	233,737	27	866,800
Private organisation	20	401,369	147	6,336,238
Religious	1	2,000	16	494,893
Total	269	14,177,259	670	37,922,813

Note * National Museums and Military of Defence (although both are managed by charitable trust)

Table 6.3: Museum and All Attraction Ownership

- The not-for-profit sectors dominate museum ownership
- Local Authorities and Charitable Trusts represent the highest concentration of museums and museum visits when compared to all other ownership types.

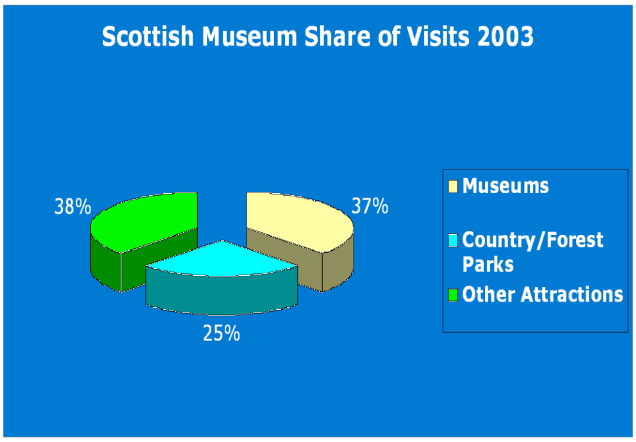
In order to consider museum performance with other attractions it would be prudent to remove 9 country park attractions which collectively recorded **9,483,192** visits for 2003.

If the **14,177,259** museum visits are removed from the all attractions aggregate total of **37,922,813** the remaining **23,745,554** visits represent the **401** other types of attractions included in the sample.

However, within other types of attraction a significant volume of visits is recorded by country and forest parks. In 2003 these alone accounted for **9** attractions recording **9,483,192 visits** which in some cases encompass a range of attraction operations and activities.

If these attractions are removed the following analysis shows the performance of Scottish Museums against the remaining **661** attractions which account for **14,262,362 visits.** This figure is only marginally more than the visits recorded for the much smaller sample of museums which demonstrates how important museums are to the visitor attraction sector in Scotland.

Museums account for 37% of Total Visits to Attractions in Scotland



Museums vary considerably in terms of their visitor capacity which is shown in the following table.

Visits 2003 - by volume of attendance

	Museums		All attractions	
Volume of attendance	**Sample**	**Visits 2003**	**Sample**	**Visits 2003**
0 - 1,999	34	35,639	82	83,053
2,000 - 4,999	44	143,992	102	338,942
5,000 - 9,999	41	287,502	109	769,951
10,000 - 19,999	49	716,749	112	1,617,928
20,000 - 49,999	42	1,384,866	114	3,567,783
50,000 - 99,999	25	1,756,971	66	4,621,281
100,000 - 149,999	9	1,033,612	26	3,205,801
150,000 - 249,999	10	1,908,344	26	5,117,305
250,000 - 499,999	12	4,344,358	25	8,507,179
500,000 - 999,999	2	1,392,692	6	3,766,778
1,000,000 and over	1	1,172,534	2	6,326,812
Total	**269**	**14,177,259**	**670**	**37,922,813**

Table 6.4: Museums and all attractions by volume of attendance

Museums welcoming **less than 20,000** visits accounted for **62%** of the museum sample and secured **8%** of total visits in 2003.

All attractions welcoming **less than 20,000** visits accounted for **60%** of the total attraction sample and secured **7%** of visits in 2003.

Note also the volume of visits for all attractions recording between 5000,000 and 1million visits. There are two points here.

- Glasgow's Kelvingrove Art Gallery and Museum closed in July 2003 for refurbishment which reduced potential visitation. This museum usually records more than one million visits per year.

- This figure includes visits recorded for a country park which provides a range of attraction facilities as well as other activities securing more than 5 million visits for 2003.

The following table shows the distribution of museums and all attractions across Area Tourist Board (ATB) regions (See Appendix I for regional map), and separates paid from free admission.

Visits 2003 - by admission, within Area Tourist Board

		Free attractions		Paid attractions	
Area Tourist Board		**Sample**	**Visits 2003**	**Sample**	**Visits 2003**
Aberdeen & Grampian	Museums	19	447,305	9	176,311
	All attractions	42	1,636,055	40	839,369
Angus & City of Dundee	Museums	8	485,027	8	132,832
	All attractions	10	662,676	18	368,913
AILLST	Museums	3	60,339	14	658,250
	All attractions	22	1,683,947	50	1,548,924
Ayrshire & Arran	Museums	8	745,176	2	49,394
	All attractions	11	819,434	16	668,831
Dumfries & Galloway	Museums	14	217,956	10	116,267
	All attractions	23	1,179,665	28	365,665
Edinburgh & Lothian	Museums	24	3,259,041	15	1,892,409
	All attractions	45	5,470,169	37	3,895,141
Fife	Museums	12	303,549	8	245,969
	All attractions	16	511,070	16	470,144
Greater Glasgow	Museums	30	3,660,120	15	800,570
	All attractions	42	10,696,250	23	886,065
Highlands of Scotland	Museums	4	141,127	19	195,662
	All attractions	32	1,166,795	58	1,930,835
Orkney	Museums	6	79,391	4	83,977
	All attractions	12	271,483	12	213,388
Perthshire	Museums	5	84,528	3	21,657
	All attractions	18	737,739	23	632,969
Scottish Borders	Museums	6	49,891	10	125,564
	All attractions	19	679,649	24	323,905
Shetland	Museums	5	46,128	1	2,758
	All attractions	13	100,903	9	28,177
Western Isles	Museums	5	75,718	2	20,343
	All attractions	7	109,111	4	25,541
Total	**Museums**	**149**	**9,655,296**	**120**	**4,521,963**
	All attractions	**312**	**25,724,946**	**358**	**12,197,867**

Table 6.5: Regional Distribution of Museums and All Attractions by Admission

- **Across Scotland the importance of museums as visitor attractions is clearly evident.**
- Free admission museums dominate most regions with the exception of AILLST, the Highlands of Scotland and the Scottish Borders.

- Free admission attractions achieve a higher average percentage of visits when compared to museums with paid admission.

The following tables show regional share of museums and visits when compared to all attractions in the region:

Museums share of attraction stock within Area Tourist Board area

Area Tourist Board	Museums as % of total attractions in the region
Aberdeen & Grampian	34.1
Angus & City of Dundee	57.1
AILLST	23.6
Ayrshire & Arran	37.0
Dumfries & Galloway	47.1
Edinburgh & Lothian	47.6
Fife	62.5
*Greater Glasgow	69.2
Highlands of Scotland	25.6
Orkney	41.7
Perthshire	19.5
Scottish Borders	37.2
Shetland	27.3
Western Isles	63.6
Total	**40.1**

Note: Glasgow's Kelvingrove Museum and Art Gallery closed for refurbishment in July 2003 which had a significant impact on Greater Glasgow's share of visits for 2003.

Table 6.6: Regional Distribution of Visits

Museums share of attraction stock within Area Tourist Board area

Area Tourist Board	Museums as % of total visits to region
Aberdeen & Grampian	25.2
Angus & City of Dundee	59.9
AILLST	22.2
Ayrshire & Arran	53.4
Dumfries & Galloway	21.6
Edinburgh & Lothian	55.0
Fife	56.0
*Greater Glasgow	38.5
Highlands of Scotland	10.9
Orkney	33.7
Perthshire	7.7
Scottish Borders	17.5
Shetland	37.9
Western Isles	71.3
Total	**37.4**

Table 6.7: Share of museums and visits within ATB regions

Museums account for between 7.7% and 71.3% of visits to ATB regions.

According to the responding sample:

- Museums account for more than 50% of all attractions in the following four regions:
    - Greater Glasgow 69%, Western Isles 64%, Fife 63%, and Angus & City of Dundee at 57%.
- Museums account for a greater market share of visits in the following regions
    - Museums in the Western Isles represent 64% of all attractions and secure more than 71% of total visits to the region
    - Museums in Angus and City of Dundee represent 57% of all attractions and secure almost 60% of visits to the region
    - Museums in Ayrshire and Arran represent only 37% of all attractions but secure more than 53% of visits to the region
    - Museums in Edinburgh and Lothian represent almost 48% of all attractions and secure 55% of total visits to the region
    - Museums in Shetland represent 27% of attractions and secure almost 40% of total visits to the region

6.3 Visitor Trends and Regional Spread

A rise in visits of **2.2%** was realised when 2003 visit figures for all visitor attractions are compared with those for 2002.

Museums experienced a rise in visits of **0.3%** when their visits for 2003 are compared with those for the previous year.

The following table shows museum performance by Area Tourist Board (ATB) region.

% change 2003-2002 by Area Tourist Board

		Museums		
Area Tourist Board	**No. Museums**	**Visits 03**	**Visits 02**	**% 2003-2002**
Aberdeen & Grampian	27	623,387	601,036	3.7
Angus & City of Dundee	16	617,859	599,751	3.0
AILLST	17	718,589	750,055	-4.2
Ayrshire & Arran	10	794,570	720,210	10.3
Dumfries & Galloway	24	334,223	322,775	3.5
Edinburgh & Lothian	35	4,731,759	4,838,719	-2.2
Fife	20	549,518	456,796	20.3
Greater Glasgow	44	4,371,755	4,449,648	-1.8
Highlands of Scotland	22	334,089	329,918	1.3
Orkney	10	163,368	151,319	8.0
Perthshire	8	106,185	98,358	8.0
Scottish Borders	16	175,455	166,003	5.7
Shetland	6	48,886	44,708	9.3
Western Isles	7	96,061	95,176	0.9
Total	**262**	**13,665,704**	**13,624,472**	**0.3**

Table 6.8: Regional Distribution of Museums and All Attractions by Admission

Edinburgh and Lothian and the Greater Glasgow area have the most museums and largest volume of visits when compared to all other ATB regions. Both cities are significant tourism honeypots and are the locations of Scotland’s primary national museum collections. However, both regions experienced a decline in visits of **2.2%** and **1.8%** respectively. The temporary closure of Kelivingrove Museum and Art Galleries contributed towards a decline for Greater Glasgow. This decline combined with a further 7% fall in visits in AILLST, helped marginalise the increases experienced in all other areas. Fife experienced the highest increase in visits (20%) to museums when compared to all other regions across Scotland.

6.4 Seasonality

It is important to note that like all visitor attraction categories museums have a clear seasonal profile in visitation. Higher concentrations of visits are recorded from the period April to September. It is worth noting that some museum organisations close from October until April.

The following table shows both seasonal distribution and seasonal trends comparing 2003 visits with those for the previous year.

% change 2003-2002 by quarter

	Museums		
	Visits 03	**Visits 02**	**% 2003-2002**
Sample	**185**		
Jan-Mar	1,889,954	1,940,262	-2.6
Apr-Jun	3,069,004	3,027,885	1.4
Jul-Sep	3,938,556	3,983,779	-1.1
Oct-Dec	2,005,142	2,086,127	-3.9
Total	10,902,656	11,038,053	-1.2

Table 6.9: Quarterly Seasonal Performance Trend

A rising trend in visits from April to June has helped offset a much poorer performance across the rest of the year, particularly in the shoulder months. Museum operators who participated in VisitScotland's [1]Visitor Attraction Barometer (VAB 2003) reported that good weather, wider advertising justified this increase in domestic visitors and tourists. On the other hand fewer coach parties and a lack of overseas visitors contributed towards the decline experienced between July to September.

The following table shows the importance of museums located in urban cities and towns in terms of number of museum sites and share of total visits.

% change 2003-2002 by geographic location

Admission	No. Attractions	Visits 03	Visits 02	%2003-2002
Rural	70	1,679,722	1,532,709	9.6
Seaside	30	741,662	738,215	0.5
Urban	162	11,244,320	11,353,548	-1.0
Total	**262**	**13,665,704**	**13,624,472**	**0.3**

Table 6.10: Visit trend by museum location

Museums located in the countryside experienced a rise of 9.6% in visits which helped to absorb visit losses of –1.0% experienced by museums located in urban cities and towns.

[1] The Visitor Attraction Barometer is a monthly barometer of visitor information gathered from a sample of more than 400 attraction operators. It covers the period January to October.

This was a result of the return of visitors to the countryside following the reduction of visitation during the foot and mouth epidemic. Fewer international tourists and good weather displacing visitors to the countryside are key negative factors reported by museums located in urban areas (VAB 2003).

It was estimated that **20%** (approximately 820,000 adults) of **Scotland's adult population** (approximately 4.1 million) visited museums in 2002/03. This calculation does not stipulate if this percentage includes repeat visits (Creaser 2003 quoted in Matty 2004).

7 VISITOR PROFILE

A report undertaken on behalf of the Museums, Libraries and Archives Council reported that **75%** of visits to museums in GB represented people from social class **ABC1** households (Mori 2004).

Some attractions did not provide visitor profile information for the 2003 VAM survey hence a smaller sample size (156 Museums/381 All Attractions) applies to this section unless otherwise stated.

7.1 Visitor Adult/Child Breakdown

Visitor attraction operators were asked to report what percentage of their visitors were adults and children. Museums share a similar adult/child profile when compared to all attractions. The following is an average percentage calculated from aggregate percentages for both Museums and All Attractions.

Museum Visitor Profiles for 2003

- Museums 74.5% Adults 25.5% Children
- All Attractions 74.7% Adults 25.3% Children

The following table represents aggregate total of share of visits realised by adult and child visitors for each museum by paid and free admission.

Reported adult & children visits (visits * %) - by admission

	Museums			All attractions		
	free	**paid**	**total**	**free**	**paid**	**total**
Sample	***88***	***68***	***156***	***185***	***196***	***381***
Adult visits	3,844,262	1,275,719	5,119,981	8,777,818	4,272,165	13,049,983
Children visits	1,188,456	565,362	1,753,818	2,643,420	1,788,008	4,431,429
Total visits	5,032,718	1,841,080	6,873,798	11,421,238	6,060,173	17,481,412
% Adults	*76.4*	*69.3*	*74.5*	*76.9*	*70.5*	*74.7*
% Children	*23.6*	*30.7*	*25.5*	*23.1*	*29.5*	*25.3*

Table 7.1 Adult/Children visits by Admission Type

- Some **5,119,981 adult visits** accounted for almost **75% of all visits** made to **all museums** in the sample

- The majority **(69%)** of all visits to **free admission museums** represented **3,844,262 adult visits**
- Just under **31%** of visits to **paid admission museums** represented **1,275,719 adult visits**

- Some **1,753,818 child visits** account for almost **26% of all visits** made to **all museums** in the sample
  - Almost **24%** of visit to free admission museums represented **1,188,456 child visits**
  - Almost **31%** of visits to paid admission museums represented **565,362 child visits**

Note all percentage calculations for the adult/child breakdown is almost identical for **all attractions**.

7.2 School Visits

In Sightseeing in the UK 2002 **visits made by school children, as part of a school group, to visitor attractions across the UK accounted for 5% of total visits** (VisitBritain 2003). The following national breakdown shows that although Scotland accrued the smallest percentage of school children they accounted for the second highest volume of visits made by school children when compared to the rest of the UK.

England	5% school children	(155.3 million visits)
Scotland	**3% school children**	**(31.8 million visits)**
Wales	8% school children	(6.5million visits)
Northern Ireland	8% school children	(5.5million visits)

Focussing more specifically on museums, research undertaken in 1999 on behalf of the Museum, Archive and Library Council identified that **5%** of visits to museums in England and Wales were undertaken by students (Mori 2001). In 2004 MLA announced that visits made by school groups in England and Wales increased by **30%** (MLA/Mori 2004 and MLA News 2004). This follows government intervention via significant investment in museum education through the renaissance of the regions scheme.

According to Sightseeing in the UK 2001 (English Tourism Council 2002), during that year 7% of visits (63.4 million visits) to museums and galleries UK-wide, were undertaken by school children as part of a school group. Comparable data for 2001

(VisitBritain 2003) recorded 38.3 million school visits which accounted for 9% of visits to museum and galleries UK-wide.

The following table shows the breakdown of school visits representing the **168 Scottish museums** that provided this information for the purpose of the Scottish VAM 2003.

School Visits

	Museums			All Attractions		
	free	**paid**	**total**	**free**	**paid**	**total**
Sample	***83***	***85***	***168***	***183***	***257***	***440***
School visits	101,111	179,239	280,350	183,712	419,575	603,287
Total visits	4,237,434	3,826,648	8,064,082	10,067,335	8,849,782	18,917,117
% school visits over total visits	*2.4*	*4.7*	*3.5*	*1.8*	*4.7*	*3.2*
% school visits over total school visits	*36.1*	*63.9*	*100.0*	*30.5*	*69.5*	*100.0*

*School visits refer to numbers of children involved in a visiting school group

Table 7.2: School Visits to Paid/Free admission Museums and All Attractions

- Visits made by school children as part of a school group account for almost **4%** of all visits to museums at 280,350 school visits. This figure should be treated with some caution since it reflects low levels of knowledge about precise profiles of visitors. The figure of 4% is drawn from the minority of (168) of Museums and Galleries that are able to provide a figure of education visits. In contrast, the total figure for child visitation to the 156 museums and galleries that provided this information e.g. accompanied by an/a adult(s) is closer to 26%.
  - Almost 64% of school visits were made to paid admission museums

7.3 Visitor Origin

Visitor attraction operators were asked to report what percentage of their visitors were local people and overseas visitors. Locals refer to local people and people involved in a day trip. The following is an average percentage calculated from aggregate percentages for the **172 museums** that responded to this question. The following table shows breakdown of visits by visitor origin recorded by the **72 museums** that provided this information.

average proportion of overseas/*locals (% averaged)

	Museums	**All attractions**
Sample	172	410
% Overseas	16.8	19.5
% *Locals	52.7	47.3

*Locals refer to local visitors and those on a day trip

Table 7.3: Average share of overseas/locals.

- **On average 52.7% of museum visitors are defined as local visitors**
- **On average 16.8% are overseas visitors**
- **The remaining 30.5%, accounts for the domestic overnight stay market which would include the holiday, business, event or visiting friends and family tourist market**

The following table represents aggregate total of share of visits realised by local and overseas visitors for each museum by paid and free admission.

overseas & local visits (visits * %) - by admission

	Museums			All Attractions		
	free	**paid**	**total**	**free**	**paid**	**total**
Sample	***103***	***69***	***172***	***216***	***194***	***410***
Overseas visits	1,039,275	1,239,290	2,278,565	2,278,295	2,412,177	4,690,472
Locals visits	4,213,755	1,235,935	5,449,690	7,890,928	3,099,475	10,990,403
Total visits	6,306,843	3,419,841	9,726,684	13,610,217	8,312,657	21,922,874
% Overseas	*16.5*	*36.2*	*23.4*	*16.7*	*29.0*	*21.4*
% Locals	*66.8*	*36.1*	*56.0*	*58.0*	*37.3*	*50.1*
% Domestic Tourists	*16.7*	*27.7*	*20.6*	*25.3*	*33.7*	*28.5*

Table 7.4: Overseas & Local Visits to Paid and Free admission Museums and All Attractions

- Some **5,449,690 visits** by **local visitors** accounted for almost **56% of all visits** made to **all museums** in the sample
- The majority **(almost 67%)** of all visits to **free admission museums** represented **4,213,755 visits made by local visitors**
- Almost **17%** of visits to **free admission museums** represented **1,039,275 visits made by overseas visitors**
- The percentage breakdown of **local visits and overseas** visits to **paid admission museums** was i**dentical** at just over **36%**
- Although **domestic tourists** account for the smallest proportion of visits to museums they represent **more than 20% of total visits to all museums.**

8 REVENUE AND INVESTMENT

8.1 Hospitality

A lucrative source of income, particularly for museums contained within large period buildings and structures is the hospitality, conference and special events market. Museums make a significant contribution to event tourism which straddles community and business events. Events include wedding ceremonies, receptions, business conferences, product launches, and local seasonal events.

8.2 Gross Revenue Income

Independent museums do not have a single dominant source of income. They receive **21%** of their income from **admission charges** (SMC 2005). Retail and catering facilities provide a source of more commercially orientated income streams.

Information on gross revenue income was provided by museum operators for the 2003 VAM. Almost 70% of the sample (188) responded to the survey question which asked museum operators how gross revenue income for 2003 compared with the previous year.

- 43% reported gross revenue for 2003 was similar to 2002
- 35% reported gross revenue for 2003 was up compared to 2002
- Almost 22% reported gross revenue for 2003 was down compared to 2002

Average gross revenue per museum visitor for 2003 was **£4.04 compared to £5.55** average visitor spend for all attractions.

The following table shows breakdown of average spend per museum visitor by type of spend and paid and free museums. For comparison purposes it also includes equivalent information for all attractions.

Distribution of gross revenue: average £ per visitor - by admission

	Museums			All attractions		
	free	**paid**	**total**	**free**	**paid**	**total**
Sample	***56***	***66***	***122***	***126***	***197***	***323***
£Admissions	£0.33	£2.24	£1.37	£0.24	£2.58	£1.67
£Donations	£0.28	£0.07	£0.17	£0.27	£0.08	£0.15
£Catering	£0.30	£0.75	£0.55	£0.69	£0.58	£0.62
£Retail	£2.07	£1.78	£1.91	£3.33	£2.29	£2.70
£Other	£0.05	£0.06	£0.05	£1.06	£0.06	£0.45
£Total	**£3.01**	**£4.92**	**£4.04**	**£5.47**	**£5.61**	**£5.55**

NB: where total does not match exactly – this is due to rounding up in revenue categories

Table 8.1: Average Gross Revenue Income per Head by Admission Type

- Average visitor spend on admission charges for paid museums **(£2.24)** is lower than the equivalent for all attractions with paid admission **(£2.58)**.
- Visitor spend on retail is higher for museums with free admission than for those with paid admission. This result is replicated for all attractions. However, all attractions with free admission recorded the highest overall average retail spend at **£3.30**. Craft workshop related attractions selling craft products influence this higher visitor spend.

The following table shows breakdown of revenue spend per museum visitor by museum location. For comparison purposes it also includes equivalent information for all attractions.

Distribution of gross revenue: average £ per person - by location

	Museums			All attractions		
	Rural	**Seaside**	**Urban**	**Rural**	**Seaside**	**Urban**
Sample	***30***	***19***	***73***	***138***	***54***	***131***
£Admissions	£1.55	£1.53	£1.25	£1.72	£2.06	£1.46
£Donations	£0.10	£0.13	£0.20	£0.18	£0.05	£0.17
£Catering	£0.74	£0.61	£0.45	£0.69	£0.62	£0.55
£Retail	£3.47	£1.64	£1.34	£3.23	£3.33	£1.88
£Other	£0.05	£0.01	£0.07	£0.70	£0.02	£0.36
£Total	**£5.92**	**£3.87**	**£3.32**	**£6.44**	**£6.04**	**£4.42**

Table 8.2: Average Gross Revenue Income per Head by Location

Retail spend per visitor in museums located in rural areas is the highest at **£3.47** when compared to all other average retail spends recorded in table 8.2.

8.3 Charging Policy and Trends in Visits

The following table shows the prevalence of museums with free admission which represent **55%** of the total responding museum stock.

% change 2003-2002 by admission charge

	Museums			
Admission	**No. attractions**	**Visits 03**	**Visits 02**	**% 2003-2002**
free	143	9,256,623	9,322,946	-0.7
paid	119	4,409,081	4,301,526	2.5
Total	**262**	**13,665,704**	**13,624,472**	**0.3**

Table 8.3: Average % Change in visits by Admission Type

In 2003 free admission museums experienced a downswing of visits of **–0.7%**, which was due to the six-month redevelopment closure of Kelvingrove Museum and Art Gallery. Regardless of this, free admission museums accrued **68%** of total visits to responding museums. Museums with an admission charged experienced a **2.5%** increase in visits compared to the previous year

In **2003** the total average admission charge for the sample of **120 museums with paid admission** was **£3.37** for adults and **£1.63** for children. Average adult admission charge for museums is marginally less than the **£3.65** average admission charge for all attractions. The following table indicates a breakdown of average admission charge by range of volume of visits. All attractions are also tabled for comparison purposes.

Average admission charges by volume of visits - paid attractions

	Museums			All attractions		
Volume of attendance	**Sample**	**Avg £Adult**	**Avg £Child**	**Sample**	**Avg £Adult**	**Avg £Child**
0 - 1,999	15	£1.96	£0.85	43	£2.25	£0.95
2,000 - 4,999	23	£1.97	£0.84	65	£2.88	£1.49
5,000 - 9,999	19	£2.65	£1.22	59	£2.95	£1.35
10,000 - 19,999	22	£3.94	£1.74	68	£3.50	£1.58
20,000 - 49,999	23	£4.61	£2.21	62	£4.60	£2.36
50,000 - 99,999	11	£4.18	£2.45	37	£4.66	£2.54
100,000 - 149,999	3	£3.67	£2.25	9	£5.24	£3.14
150,000 - 249,999	1	£4.95	£3.50	9	£6.10	£3.54
250,000 - 499,999	2	£7.23	£3.48	4	£7.85	£4.10
500,000 - 999,999				1	£8.00	£5.00
1,000,000 and over	1	£9.50	£2.00	1	£9.50	£2.00
Total	**120**	**£3.37**	**£1.63**	**358**	**£3.65**	**£1.87**

Table 8.4: Average Adult/Child Admission Charge by Volume of Visits

- In 2003 the **highest average admission charge** for both **museums** and **all attractions** was **£9.50**.

- Average adult admission charge under £2 were secured by museums recording less than **5000** visits which was less than the equivalent for all attractions with the same level of visitor volume.

8.4 Investment in Museum Improvements

This part of the section analyses VAM data to provide an indication of the impact of investment on museum attendance. A sample of **181 (67%)** museum operators reported whether or not they had carried out museum improvements during 2003. The majority, **123 (68%**), of these museum operators reported no improvements.

A minority of **58 (32%)** museum operators reported investing in museum improvements during 2003.

- **53%** (31) were paid admission museums
- **47%** (27) were free admission museums
- **Almost 83%** (48) recorded less than **50K visits for 2003**
- **The remaining 17%** (10) recorded **50K or more visits in 2003**

The following table sets out volume of attendance by average cost of improvements in the sample of 37 museum operators who provided data in this area:

Average investment by volume of attendance

	Museums		All attractions	
Volume of attendance	**Sample**	**Avg Investment (£)**	**Sample**	**Avg Investment (£)**
0 - 1,999	8	£6,244	17	£4,191
2,000 - 4,999	8	*£299,958	14	£178,605
5,000 - 9,999	2	£1,785	21	£76,720
10,000 - 19,999	4	£4,506	14	£17,059
20,000 - 49,999	8	£15,417	25	£27,625
50,000 - 99,999	2	£24,000	12	£52,412
100,000 - 149,999			2	£240,000
150,000 - 249,999	1	£19,900	6	£138,317
250,000 - 499,999	3	£71,667	6	£244,167
500,000 - 999,999	1	£150,000	2	£233,500
total	**37**	**£81,823**	**119**	**£75,489**

Note: *This high investment figure is due to one museum that recorded less than 5K visits because of partial closure due to major improvements costing **£1.6m.**

Table 8.5: Average Investment by Volume of Attendance

The following table shows average cost of improvements by location of museum with all attraction comparison.

Average investment by geographic location

	Museums		All attractions	
Geographic location	**Sample**	**Avg Investment (£)**	**Sample**	**Avg Investment (£)**
Rural	8	£41,802	52	£28,381
Seaside	4	£5,431	16	£48,319
Urban	25	£106,852	51	£132,044
total	**37**	**£81,823**	**119**	**£75,489**

Table 8.6: Average Investment by Geographic Location

The table shows that most (25) museums were located in urban areas with an average of **£106,852** being spent on improvements.

The following explains average cost of improvements made by the paid museum sector was greater than that of the free museum sector and all attractions.

- For **paid admission** museums **(21) average cost of improvements** was **£121,188**
- For **free admission** museums **(16) average cost of improvements** was **£30,157**

Average improvement costs for all attractions **(119 attractions)**

- For **paid admission** attractions **(64) average cost of improvements** was **£74,353**
- For **free admission** attractions **(55) average cost of improvements** was **£76,809**

Although this evidences a cycle of reinvestment in this important cultural sector the actual levels of investment remain very low and are a concern

9 DWELL TIME

This section looks at the length of time visitors spend in a sample (154) of museums who provided this information. This section also includes tabled comparisons for all attractions.

9.1 Dwell Time

The average time spent in museums was **78 minutes for museums** and **82** minutes for **all attractions**.

Museum operators provided a breakdown of information for length of time spent in the attraction, catering, retail and any other part of the museum experience.

Dwell time: average minutes per person - by admission

	Museums			All attractions		
	free	**paid**	**total**	**free**	**paid**	**total**
Sample	***82***	***72***	***154***	***181***	***205***	***386***
Mins Attraction	43	66	54	44	64	55
Mins Catering	8	11	9	11	11	11
Mins Retail	7	9	8	9	10	10
Mins Other	8	5	6	7	6	6
Mins Total	**66**	**91**	**78**	**71**	**91**	**82**

Table 9.1: Average time (minutes) spent in attraction per person by admission

- Average length of time spent in the main attraction element was **54 minutes** for museums and **55 minutes** for all attractions
- Dwell time in the actual attraction was longer in those with paid admission at **66 minutes for museums** and **64 minutes for all attractions**
- Time spent in catering and retail for **free admission museums** is marginally less than for paid museums and all other attractions regardless of admission policy.

The following table provides a breakdown of average dwell time for responding museums and all attractions by museum location.

Dwell time: average minutes per person - location

	Museums			All attractions		
	Rural	**Seaside**	**Urban**	**Rural**	**Seaside**	**Urban**
Sample	***41***	***19***	***94***	***170***	***56***	***160***
Mins Attraction	59	47	53	58	48	53
Mins Catering	10	7	9	11	7	11
Mins Retail	9	7	8	11	7	9
Mins Other	8	2	7	7	4	7

Mins Total	**85**	**64**	**77**	**88**	**66**	**80**

Table 9.2: Average Time Spent in Attraction per person by Location

Average total dwell time was longer for **urban based** attractions at **94 minutes** for museums and **160 minutes** for all attractions. Although visitors spend most time in the actual attraction, the aggregate time spent in other facilities and services range from an average of 16 to 29 minutes.

9.2 Museum Promotion and Key Market Drivers

For the purpose of the VAM 2003, Museum operators were asked if marketing expenditure was up, down or similar to the previous year. The following table shows responses from the **217** museum operators who answered this question.

Most operators (**160 almost 73.7%)** reported that marketing expenditure was similar in 2003 when compared to the previous year. Only **17.5%** reported an increase in marketing expenditure while the remaining **8.8%** reported a cut in marketing.

In **2003** a sample of **118 museum operators** reported positive and negative factors that had an impact on their annual visit figures.

The following table shows 'all positive' and all 'negative' factors reported by museum operators.

(n= 118)			(n=107		
All positive factors	**No.**	**%**	**All negative factors**	**No.**	**%**
popular exhibitions / events	38	32.2	weather	41	38.3
weather	38	32.2	closure / disrupted due to refurbishment / changes	15	14.0
promotion / marketing	30	25.4	global issues	12	11.2
miscellaneous	13	11.0	decline in promotions/advertising	10	9.3
more tourists	13	11.0	generally less visitors	9	8.4
new addition / refurbishment	11	9.3	location	6	5.6
friendly / supportive / helpful staff	6	5.1	lack of funding	6	5.6
school / education	6	5.1	less USA / foreign visitors	6	5.6
free admission	4	3.4	miscellaneous	6	5.6
increase in UK/European visitors	3	2.5	little interest in exhibition / event	5	4.7
the attraction itself	3	2.5	competition	5	4.7
transport	3	2.5	transport - costs / links etc	4	3.7
local support	2	1.7	poor / no signage	4	3.7
location	2	1.7	admission charges	3	2.8
signage	2	1.7	parking	2	1.9
extended season / opening hours	1	0.8	Scotland - expensive destination	2	1.9
global issues	1	0.8	less hours / days / season	2	1.9
good value	1	0.8	lack of local support	2	1.9
no FMD	1	0.8	N/A	2	1.9
support from community	1	0.8	trends in tourism	2	1.9
			uncertainty of future	2	1.9
			unknown attraction	2	1.9
			catering / retail unsatisfactory	1	0.9
			staff - retirement / unavailable etc	1	0.9
			high cost of fuel	1	0.9

Table 9.3: All Positive and Negative Factors Affecting Visitation in 2003

Popular interest in exhibitions was the most repeated positive impact on visitation while weather had the most negative impact.

The following table shows the **most important factors** affecting museum visitation in 2003 as reported by museum operators.

(n=115)		(n=103)		
Most important positive factors	**No.**	**Most important negative factors**	**No.**	**%**
weather	32	weather	34	33.0
popular exhibitions / events	26	closure / disrupted due to refurbishment / changes	12	11.7
promotion / marketing	22	decline in promotions/advertising	8	7.8
more tourists	11	generally less visitors	7	6.8
new addition / refurbishment	7	misc	5	4.9
misc	6	less USA / foreign visitors	4	3.9
school / education	4	global issues	4	3.9
friendly / supportive / helpful staff	4	lack of funding	4	3.9
transport	3	competition	3	2.9
free admission	3	location	3	2.9
location	2	poor / no signage	3	2.9
signage	1	transport - costs / links etc	3	2.9
no FMD	1	little interest in exhibition / event	3	2.9
the attraction itself	1	N/A	2	1.9
extended season / opening hours	1	parking	2	1.9
local support	1	Scotland - expensive destination	2	1.9
good value	1	uncertainty of future	2	1.9
global issues	1	admission charges	1	1.0
		less hours / days / season	1	1.0
		lack of local support	1	1.0
		trends in tourism	1	1.0
		unknown attraction	1	1.0
		catering / retail unsatisfactory	1	1.0

Table 9.3: Most Positive and Negative Factors Affecting Visitation in 2003

Weather was the most frequently reported **most positive and negative factor** affecting visitation.

10 MUSEUM EMPLOYMENT: COST EFFECTIVE LABOUR MARKET

10.1 Range of Employment Experiences

According to Scotland's National Audit, in 2001 Museums in Scotland employed **10,885** staff and volunteers. Some **2,899** of paid staff worked full-time while **53%** were volunteers.

At that time Glasgow City Council accounted for **43%** of all full-time staff employed within Scotland's Local Authority Museum Services. Since 2001 there have been considerable ground breaking developments within Glasgow alone which have had an impact on museum service provision and employment. Restructuring has involved some major changes including museums forging closer links with other services. For example, Adult Learning and Youth Services are now out of Education and part of Cultural and Leisure Services. Major new developments such as the refurbishment of the Art Gallery and Museum at Kelvingrove and the proposed New Riverside Museum have led to significant employment opportunities emerging particularly in project management, curatorial, access and learning positions. According to the Museums and Galleries Year Book 2005 Glasgow museums employs 80 members of management, curatorial, conservation and access that come under the umbrella of Visitor and Central Services. Across the 13 museum sites there are approximately 400 employees including administrative staff, museum attendants and stores staff etc who work on various contracts.

The museum labour market has long established links with traditional universities and post- graduate skills attainment, particularly in technical, scientific and education related disciplines. In recent years strategic priorities have pressed operators to be more accountable and manage themselves more effectively. This has resulted in the need for more skills flexibility to achieve a wider range of goals. Regardless of this the museum labour market has gained the reputation of being highly skilled but low paid.

There is also a hidden source of employment generated by Museums.

- Temporary members of staff on short term contracts
- Freelancers and consultants used for specialist conservation or major projects
- Artists and benefactors who provide or interpret exhibits for museum related exhibitions

- Providers from private sector such as those employed in providing museum products for exhibitions, retail, catering etc.

Museums also has a legacy of hosting student placements and volunteers, particularly retired people. Both pursuits are a great way to develop new skills and gain work experience. In 2001 a comprehensive survey of museum volunteers targeted a sample of **2,000 volunteers** who worked in museum sites spread across Scotland. The survey achieved a 34% response rate recording data representing 326 volunteers who were involved in a range of tasks. The following is a breakdown of highest qualification and most important skill volunteers reported was relevant to their volunteering work. Most volunteers reported more than one skill so total exceeds 100%.

- Degree or post-graduate qualification 35%
- HND/HNC or other Further Education Qualification 25%
- Specialist craft or other practical skill 53%
- Special interest knowledge 43%
- Social skills 35%
- Other skills 4%

Term of volunteering varied as follows:

- 50% 5 years or less
- 23% 6-10 years
- 26% more than 10 years

Time commitment ranged from full-time equivalent down to volunteers who worked on a short-term project. Tasks undertaken included museum guiding and conservation related tasks.

Benefits gained from volunteering included the experience to; network with like minded people, contribute positively to the visitor experience, develop existing knowledge/skills, improve physical well being and do something worthwhile for the museum.

10.2 Employment Breakdown

Operators providing employment information for the VAM represented a total of **553 attractions** which included **205 museums**. They accounted for a total of **11,159 staff**. The following table includes a breakdown of employment which separates **205** museum organisations which reported employing **4,854** members of staff including unpaid volunteers.

Percentage Breakdown of Total staff

	Museums %	All Attractions %
Sample	***205***	***553***
FTP	*24.9*	*26.2*
PTP	*14.0*	*11.3*
FTS	*3.1*	*10.7*
PTS	*8.5*	*12.9*
UV	*49.5*	*38.8*
Total	***100.0***	***100.0***

Table 10.1: Breakdown of Museum Employment

- **Employment breakdown shows that 50% of museum staff are volunteers involved in various tasks and time commitments**
- **25% are full time permanent paid employees**
- **14% are part time permanent paid employees**
- **3% are Full Time Seasonal/Temporary paid employees**
- **Almost 9% part time Seasonal/Temporary paid employees**

Total average staff per attraction

	Museums	All attractions
Sample	***205***	***553***
FTP	6	5
PTP	3	2
FTS	1	2
PTS	2	3
UV	12	8
Total	**24**	**20**

Table 10.2: Average Staff per Attraction

The average number of staff per museum works out at 24 with 50% being volunteers while 25% were full-time permanent paid members of staff. When all attractions are included there is an average of 20 staff per attraction.

The following table provides much more information giving a breakdown of staff by museum admission policy.

Total staff - by admission

	Museums				All attractions			
	Free		**Paid**		**Free**		**Paid**	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
Sample	***106***		***99***		***249***		***304***	
FTP	757	*33.8*	451	*17.2*	1,528	*29.8*	1397	*23.2*
PTP	419	*18.7*	262	*10.0*	772	*15.1*	492	*8.2*
FTS	21	*0.9*	128	*4.9*	375	*7.3*	822	*13.6*
PTS	112	*5.0*	303	*11.6*	416	*8.1*	1024	*17.0*
UV	929	*41.5*	1472	*56.3*	2,034	*39.7*	2299	*38.1*
Total	**2,238**	***100.0***	**2,616**	***100.0***	**5,125**	***100.0***	**6,034**	***100.0***

Table 10.3: Breakdown of Museum Employment by Admission

The following table shows the average number of staff per attraction by admission policy.

Total average staff per attraction - by admission

	Museums		All attractions	
	free	**paid**	**free**	**paid**
Sample	***106***	***99***	***249***	***304***
FTP	7	5	6	5
PTP	4	3	3	2
FTS	0	1	2	3
PTS	1	3	2	3
UV	9	15	8	8
Total	**21**	**27**	**21**	**20**

Table 10.4: Average Number of Staff Per Attraction by Admission Policy

On average paid admission museums have more staff than those with free admission with most being volunteers.

The following table shows total average staff per attraction by volume of attendance

Total average staff per attraction - by volume of attendance

	0 - 1,999	2,000 - 4,999	5,000 - 9,999	10,000 - 19,999	20,000 - 49,999	50,000 - 99,999	100,000 - 149,999	150,000 - 249,999	250,000 - 499,999	500,000 - 999,999	1,000,000 and over
Museums											
Sample	***29***	***42***	***28***	***38***	***30***	***18***	***6***	***2***	***9***	***2***	***1***
FTP	0.2	0.5	0.7	2.6	3.5	9.4	9.8	9.0	22.2	194.0	123
PTP	0.2	0.6	1.0	1.6	3.2	4.6	10.2	8.0	21.9	50.0	10
FTS	0.0	0.2	0.2	0.4	0.6	1.6	0.0	5.0	3.0	2.0	29
PTS	0.9	0.9	0.8	3.4	3.0	3.0	0.7	5.0	4.2	0.5	0
UV	14.1	13.1	8.7	9.1	12.9	11.1	31.0	24.0	0.4	60.0	0
Total	**15**	**15**	**11**	**17**	**23**	**30**	**52**	**51**	**52**	**307**	**162**
All attractions											
Sample	***73***	***91***	***92***	***90***	***89***	***52***	***20***	***17***	***21***	***6***	***2***
FTP	0.5	0.8	1.7	2.4	3.6	6.9	11.6	19.7	17.7	105.0	99
PTP	0.3	0.4	0.8	1.2	2.2	3.3	6.4	8.1	10.9	25.7	6.5
FTS	0.2	0.4	0.6	0.9	2.5	3.6	6.9	14.0	4.5	15.0	24.5
PTS	0.8	1.1	1.5	2.5	3.9	4.8	6.0	5.2	3.5	7.0	0
UV	8.6	9.6	7.2	5.5	8.9	5.2	9.7	3.6	10.5	35.6	0
Total	**10**	**12**	**12**	**13**	**21**	**24**	**40**	**51**	**47**	**188**	**130**

Table 10.5: Breakdown of Museum Employment

Museums recording more than 250,000 visits or more have a significantly higher number of full-time and part-time permanent employees than museums recording fewer visits. The fewer the visits the more dependent museums are on volunteers.

11 MUSEUMS' ROLE IN DESTINATION MARKETING

Tourists' perceptions of Scotland and their interest in cultural heritage demonstrate the importance they place on the Scottish landscape, built heritage and culture (VisitScotland 2003b).

11.1 Marketing and Iconic Representation

Online destination marketing using museum icons tends to focus on city destinations or destinations linked to influential Scottish personalities like Robert Burns and William Wallace. Regardless of this, the role of museum icons in marketing across the country is as yet underplayed at an organisational, local, regional and national level. This suggests that investment in exploiting iconic representation to maximise potential needs to be tackled at various levels to be collectively supportive. At a grass roots level museums/museum services that lack resources e.g. have no marketing budget, or lack specific expertise are therefore disadvantaged, regardless of their performance as a visitor attraction.

Digitisation and advances in technology bring a new dimension to the use of iconic imagery, and open up opportunities to promote museums more effectively and competitively in line with international benchmarks of good practice.

It is clear in any examination of international destination marketing campaigns that cultural heritage including heritage landscapes and buildings are central marketing icons.

Developing associated images which will drive the iconic strength of a tourism product is a difficult process. Strategic image management is a continual process that has clear steps to:

- identify the images that are representative of a place,
- use those images to target audiences,
- correlate specific images with diverse demographic constituencies within the target audiences.

'Place Image' is the sum of beliefs, ideas and impressions that people have of a destination. 'Image' represents a simplification of a large number of associations and pieces of information connected with the place.

A small number of places have managed to create strong brand names and images for the products and services they provide. Where this occurs, the brand activities convey the essence or spirit of the destination.

The central argument here is that for Scotland, in particular in its city and urban destinations, museums as iconic buildings along with their collections have played a key role in the development of Scotland.

Museums as heritage buildings are identified icons of many cities. They are the unique venues for meetings, functions, corporate hospitality and product launches; events that most effectively sell such destinations.

To place an economic value on such icons is extremely difficult even though they are central to city and national brands. Only by considering the difficulty those destinations would face without such iconic representation can their true value be appreciated.

Therefore, museums are a vital statement of place image as well as being a central destination/activity for many tourists whether as site visitors or corporate delegates. This applies to both small-scale rural museums and to large national museum and gallery services alike. Whilst certain key sites are continually visually referenced the Scottish museums and galleries sector provides a canvas on which to paint and represent Scotland in its widest cultural sense. Museums as increasingly flexible, multi-purpose venues are vital to tourism marketing and wider iconography, and therefore should receive investment and development funding commensurate with this role.

For place images to be effective they must:

- be valid
- be believable
- be simple
- be distinctive
- have appeal

Museums and Galleries could play a significantly greater role in establishing Scottish place image, which would lead to favourable differentiation from competitors.

11.2 VisitScotland: Extent of Museum Iconic Marketing

Scotland is particularly rich in icons and such imagery provides a highly cost effective supplement that is instantly recognisable and considerably less expensive than new brand development. The average destination marketing campaign in 2004 cost in excess of £2.5m and this does not include associated creative development of brands, brand testing etc. For this reason if a recognisable icon exists, or there is a particularly distinctive offering available this will of course be used.

In VisitScotland's website promotion, images of museums are more prominent in branding Scotland and its cities, including Aberdeen, Dundee, Glasgow, Edinburgh, Inverness and Stirling., http://www.visitscotland.com/aboutscotland/cities/

Museum images used in city marketing include:

- Aberdeen's Provost Skene's House, Art Gallery and Maritime Museum
- Dundee's Discovery
- Glasgow's Science Centre, Burrell Collection and Gallery of Modern Art
- Edinburgh's Castle, National Museums and Galleries are all included in a collective image of city period architecture
- Inverness's Museum and Art Gallery and Castle Gallery
- Stirling's Castle and National Wallace Monument

VisitScotland promotes Scotland's national heritage using four icons, three of which are buildings which contain museum collections. They include, Edinburgh Castle, the Gallery of Modern Art and New Lanark World Heritage Village http://www.visitscotland.com/aboutscotland/explorebymap/features/heritage

The promotion of culture and art uses images of the Morven Gallery on the Isle of Lewis http://www.visitscotland.com/aboutscotland/culture/art?view=links

Any review of the conference and convention tourism marketing documentation of the cities of Edinburgh and Glasgow illustrates very strong representation of museum assets.

Images of museums and galleries play a significant role in developing Scotland as a 'must visit' destination for visitors and tourists. However, the potential for museum imagery to further strengthen marketing of a range of destinations across Scotland is as yet underdeveloped.

12 CONCLUSION

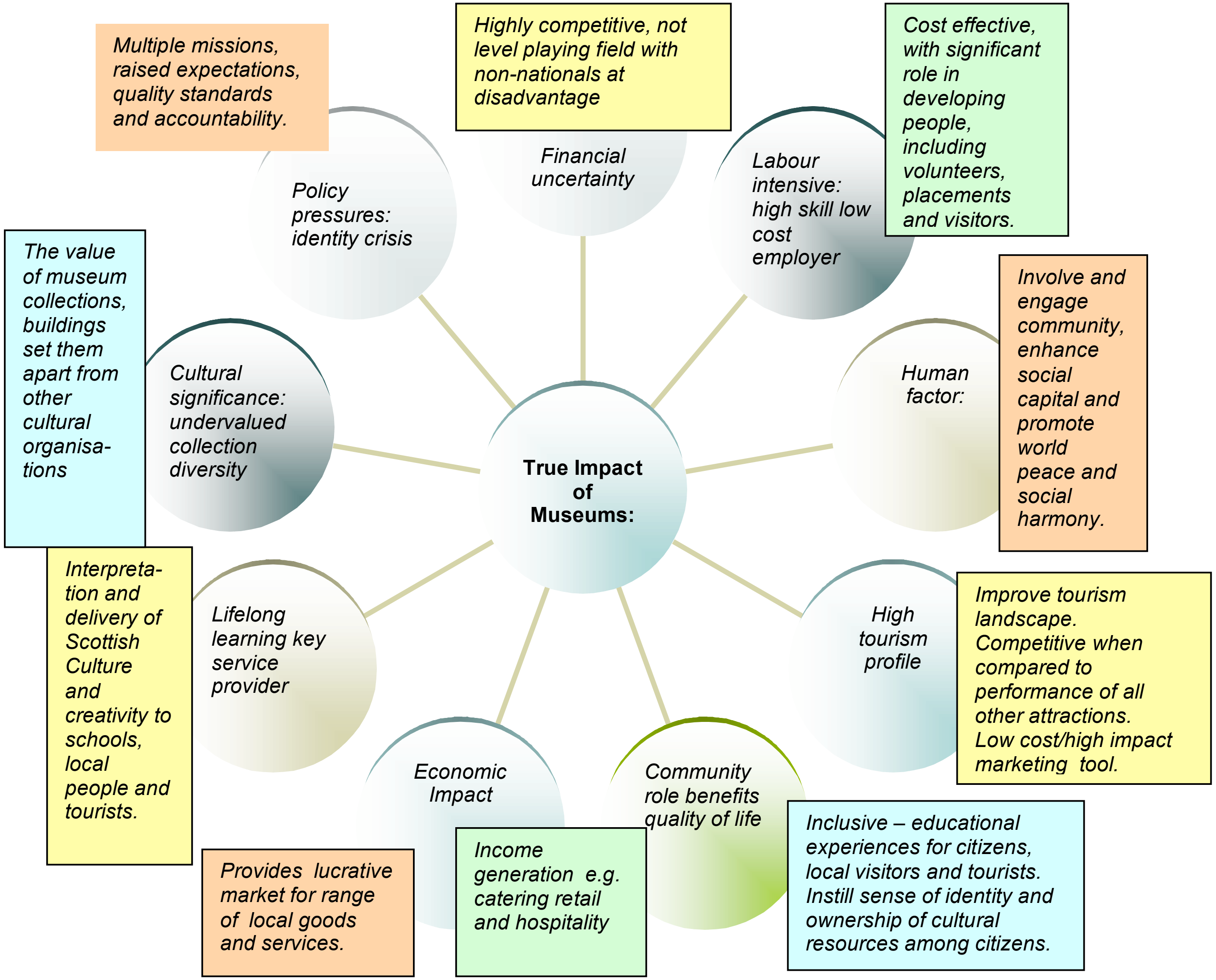
This report clearly identifies the centrality of Museums and Galleries to the cultural sector in Scotland. Museums and Galleries are central to tourism destination marketing and provide a foundation for the iconic representation of the nation and its people. This vital but disparate set of cultural resources are for the first time recognised as a key cultural resource that lies at the heart of visitor experiences in urban, rural and coastal regions.

This report represents an important starting point and addresses for the first time terminology related issues focussing around the need for common data harmonisation. This process has helped to scope the scale of Museums and Galleries and their impact on the visitor experience in Scotland. The importance of undertaking this exercise has identified the critical mass of cultural resources that are ignored at our peril.

This report helps explain why a monetary value that measures the true impact of museums on Scottish tourism and its cultural economy is problematic. The reason for this is lack of awareness concerning the scale of operations and the extent direct and indirect benefits tend to be ignored or taken for granted or are simply impossible to measure. The range of museum collections is immensely diverse and the full extent of museum activities across the country is not fully documented or appreciated.

Of critical importance is the financial instability experienced within the sector at a time when museums are expected to become more accountable to a wider section of the public as well as contribute significantly towards local economic priorities which include their role in tourism.

The centrality of museums and galleries to tourism is demonstrated in the following model which illustrates the major issues and benefits which are far-reaching and help explain the complexity of this highly dynamic and varied sector:


True Impact of Museums:
Policy pressures: identity crisis
Multiple missions, raised expectations, quality standards and accountability.
Financial uncertainty
Highly competitive, not level playing field with non-nationals at disadvantage
Labour intensive: high skill low cost employer
Cost effective, with significant role in developing people, including volunteers, placements and visitors.
Human factor:
Involve and engage community, enhance social capital and promote world peace and social harmony.
High tourism profile
Improve tourism landscape. Competitive when compared to performance of all other attractions. Low cost/high impact marketing tool.
Community role benefits quality of life
Inclusive – educational experiences for citizens, local visitors and tourists. Instill sense of identity and ownership of cultural resources among citizens.
Economic Impact
Income generation e.g. catering retail and hospitality
Provides lucrative market for range of local goods and services.
Lifelong learning key service provider
Interpreta-tion and delivery of Scottish Culture and creativity to schools, local people and tourists.
Cultural significance: undervalued collection diversity
The value of museum collections, buildings set them apart from other cultural organisa-tions

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http://www.britainexpress.com/scotland/museums/edinburgh.htm

http://www.answers.com/topic/museums-in-scotland http://www.rampantscotland.com/museums.htm

http://www.totaltravel.co.uk/travel/scotland/directory/artgalleries

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http://www.britannia.com/travel/scotland_museums.html

http://www.britainexpress.com/scotland/museums/

http://www.aboutbritain.com/MuseumsAllRegions.htm

http://www.aboutbritain.com/MuseumsNScotland.htm

http://www.scotsmart.com/c/museums.html

http://www.cali.co.uk/HIGHEXP/Toseedo.htm

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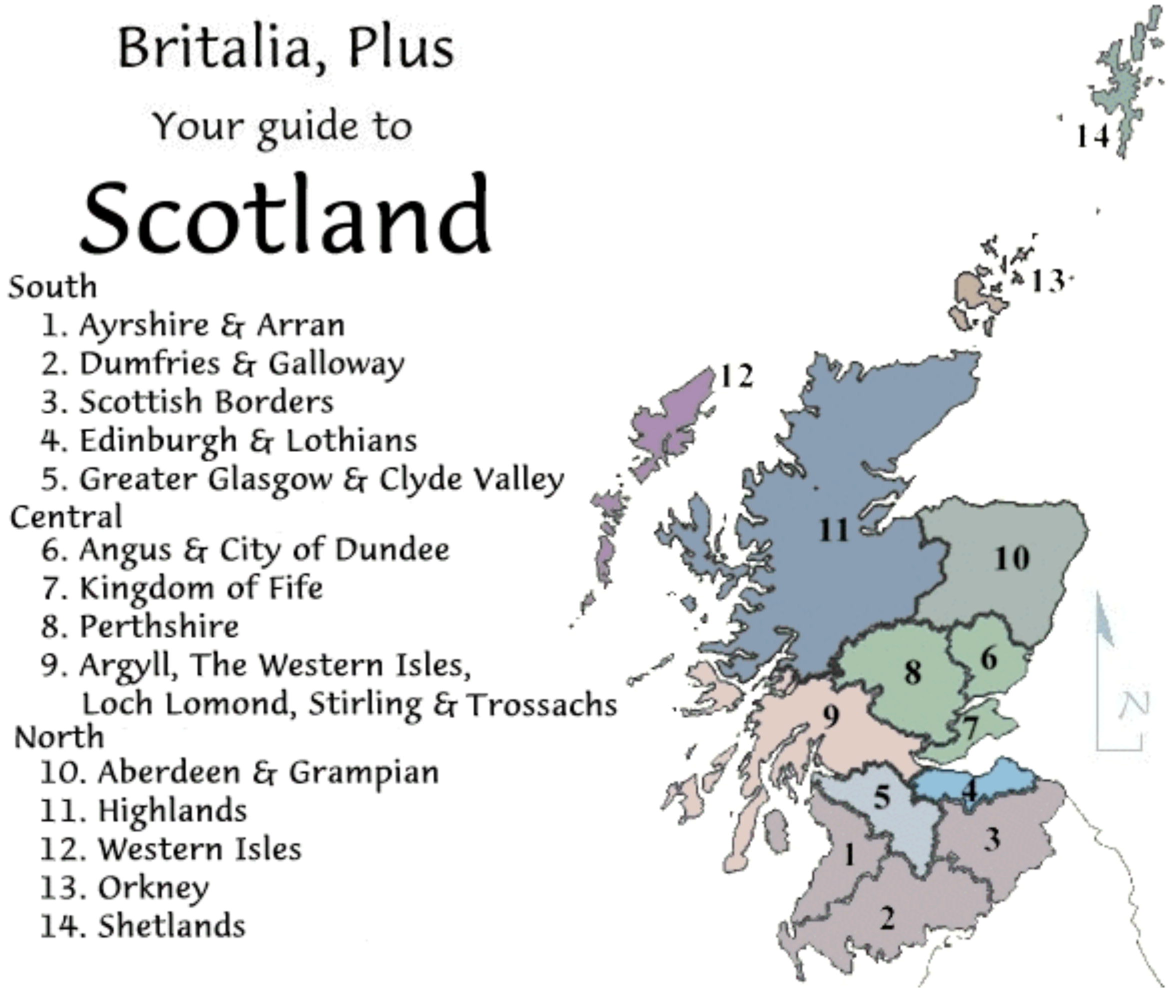
Accommodation Websites that promote museums

http://www.bellevuebandb.co.uk/dalbeattie.htm

http://www.hotels-edinburgh-scotland-hotels.com/

APPENDIX 1



Source: http://www.britaliaplus.com/scotland/map_sc.htm