

Measuring Performance: The Case of the Scottish Museum and Gallery Sector

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Abstract: This paper applies the concept of tourist destination lifecycle to explain visitor attraction performance as an evolutionary process. As a starting point it explores a critique of Butler's (1980) hypothetical model with a view to applying it to historical visitor attraction data. The paper builds on Scottish visitor attraction lifecycle analysis developed by Lennon (2001) by focusing on the museum and gallery sector. It will provide evidence that factors impacting on the lifecycle of these organisations are multifarious to such an extent that the sector operates in a highly chaotic environment. By analysing qualitative positive and negative impacts on visitor attraction performance commonalities will be identified to explain performance trends. Case study examples will be used to explain the experience of individual museums and galleries. The idea is to explore the scope of causal factors that impact on the lifecycle curve. It is expected that this paper will contribute towards further research that strives to develop a model of sustainable development for museums. This model will ultimately help guide visitor attraction managers to build a strategy to help combat decline. This will provide a useful tool for future planning and development as well as for forecasting performance.

Keywords: Lifecycle, chaos theory, visitor attractions, museums and galleries, performance indicators, tourism trends.

Defining the Visitor Attraction Sector

According to the 2003 Visitor Attraction Monitor the Scottish visitor attraction sector was compiled of 980 (VisitScotland, 2004) organisations that fit comfortably within the following definition,

“a permanent established excursion destination, a primary purpose of which is to allow access to 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 attraction 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 economic questions on revenue, employment, etc.”

(VisitScotland, 2004)

However, any analysis of the attraction sector is problematic due to the scope and distinctive characteristics of the organisations that make up the sector and the primary visitor segments they target.

A minority of attractions have been designed to generate profit and attract tourists while the majority are non-profit-making cultural heritage related sites

with a mission to serve their local community. For this reason it can be argued that their relationship with tourism is somewhat compromised. This is the case for most non-national museum and gallery developments.

Establishing the Research Context

According to the UKTS Surveys (2001 and 2002) Scotland depends primarily on domestic tourists. Although the highest concentration of international visitors originates from the United States of America and Europe, Scotland attracts visitors from across the world. Most tourist spend relates to accommodation (£890 million) and travel (£840 million) transactions, followed by eating, drinking (£790 million) and shopping (£560 million). In 2002 spending on entertainment accounted for £260 million (UKTS, 2002).

This paper will focus on Scottish museums and galleries which make up the largest category within the visitor attraction sector in Scotland. Table I shows the breakdown of visitor attractions responding to the 2003 Visitor Attraction Monitor of which 29% are museum and gallery organisations.

Table I: Visitor Attraction Monitor 2003

Category	Number of Attractions
Castle/Fort	64
Country Park	20
Distillery/Vineyard/Brewery	35
Garden	42
Heritage Visitor Centre	112
Historic House/Palace	41
Historic Monument/Archaeological Site	28
Industrial Craft Workplace	20
Museum/Art Gallery	190
Nature Reserve/Wetlands/Wildlife/Trips	17
Other Historic Property	15
Place of Worship	18
Safari Park/Zoo/Aquarium/Aviary/Farm	18
Steam/Heritage Railway	8
Other	23
Total	651

VisitScotland (2004: 12)

The museum sector is spread across Scotland with most sites being located in cities and towns. Approximately 45% of museums and galleries record in excess of 10,000 visits per year (VisitScotland, 2004).

Organisations within this dominant not-for-profit category are either owned by the public sector or by independent trusts. The sector has a strong free admission policy for core collections with 66% reporting free access (Visit Scotland, 2004, p. 16).

Museums and galleries are highly dependent on public funding and/or philanthropic sources of income, labour and assets (Lennon and Graham, 2001a). Most non-national museums and galleries suffer chronic financial insecurity (Ryder, 2001). Although these organisations were not designed to attract tourists and generate profit, more emphasis has recently been afforded to developing existing facilities and to 'added value' services like catering and retail to increase revenue streams as well as visitor volume (Lennon and Graham, 2001b).

Employment contracts are extremely diverse being made up of full-time, part-time and seasonal paid workers with an extremely high dependence on volunteer support. In 2003 39% of the museum labour force were unpaid staff (VisitScotland, 2004, p. 30). The skills base tends to focus on traditional museum expertise like conservation and education and is weak on the level of management skill required to understand and compete wholeheartedly as a player in commercial tourism (Lennon and Graham, 2001b).

Measuring Performance

This paper focuses on developing existing research which measures attraction performance using a method derived from product lifecycle analysis (Swarbrooke, 1998; Lennon, 2001; McKercher, Ho and Cros, 2004). However, other approaches provide an insight into the range of performance expectations museums and galleries are expected to achieve.

In 2002 the Scottish Museums Council published its findings from a national audit (SMC 2002a, 2002b) which served to,

“... identify the scope and significance of Scotland's Museum collections within categories . . . International, UK-Wide, National, Regional and Local”

(Scottish Museums Council, 2001)

The audit also provided the opportunity to assess the performance of museum stock and recommended the development of a new standards framework. This was developed in 2003 to set minimum standards, provide opportunities to improve performance and to reform inconsistencies in historic funding procedures (SMC 2002a, 2002b, 2003). Performance indicators are measured against minimum standards of service to the public, learning and access, use of new technology and management of collections. The findings of the audit are expected to inform strategic planning and development policy to argue for the resources necessary to maintain and raise standards (SMC, 2001).

However, measuring the performance of museums as visitor attractions places more emphasis on business success factors. In this context they operate in a highly competitive market place which lies at the heart of tourism (Swarbrooke, 1998). In recognition of this important contribution to the national economy,

since 1983 VisitScotland have undertaken annual visitor attraction surveys to monitor performance trends. Critical success factors used to measure attraction performance focus on visitor numbers and average visitor spend. This primary method of performance measurement separates the attraction sector from other business operations.

The work of McKercher, Ho and Cros argues that the delivery of museum experiences needs to take account of market knowledge. The authors explain why some cultural attractions are more popular than others. Quality of experience, a critical success factor, involves strategies that clearly define target markets and create compatible interactive, entertaining and educational experiences (McKercher, Ho and Cros 2004). They argue that tourists are unlikely to make repeat visits to museums if there is nothing new to capture their interest. The authors argue that revitalising museums and other heritage sites is more challenging than for other attractions because of limited resources, particularly staff and money.

Some other innovative methods of assessing museums include commentators who apply a yield management approach and focus on commercial performance (Kerr and Gibson, 1999). This approach is particularly problematic when the value of capital assets like buildings tend not to be regarded as part of the museum product.

Methodology

This paper will build on the work of Lennon (2001) by arguing that factors impacting on the lifecycle of the museum and gallery sector are multifarious to such an extent that it operates in a highly chaotic environment. This approach argues that movements in the popularity of visitor attractions are sensitive to shifts up or down that may not be consistent across each year. A critique of lifecycle research will provide a framework for analysis which will be developed to identify causal impacts that shape the attraction lifecycle curve. Quantitative and qualitative information will be drawn from historic museum and gallery visitor information gathered from comprehensive Scottish visitor attraction surveys undertaken between 1991 and 2003. Further qualitative evidence will be drawn from the Visitor Attraction Barometer (VAB), which since 1999 has monitored monthly trends in attraction attendance. The VAB is the most up to date national tourism-related survey in the UK. As well as visitor volume it records qualitative comments submitted by attraction operators to help explain factors that impact on visitor flows. These factors are provided on a monthly basis and can explain how unstable the visitor attraction sector is. This chaotic and unreliable environment makes forecasting demand and strategic planning extremely challenging, stressing a need for this type of research. The objective of this paper is to apply the product lifecycle approach to trends in visits to museums and galleries using some case study examples.

This paper will provide the foundation for further research which will aim to develop a model to assist attraction managers prepare a strategy to combat decline.

Tourism Lifecycle

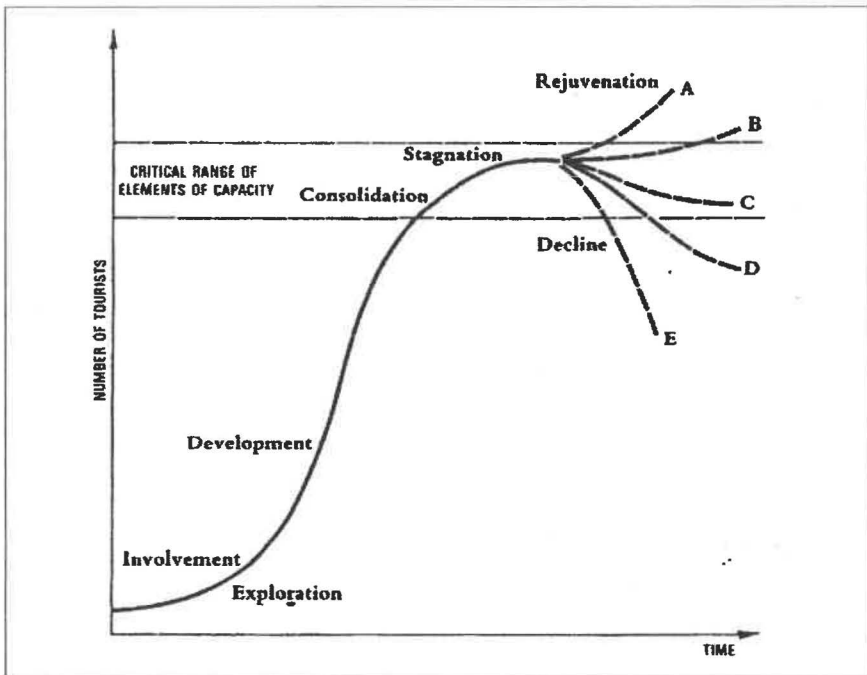
Butler (1980) constructed the vision that the developmental processes emerging within tourism systems evolved and was susceptible to change over time. He argued that tourist attractions are finite non-renewable resources. This argument can be applied to the preservation and maintenance of natural and cultural attractions such as those that interpret landscape and manmade artefacts. He focuses his argument on demand theory suggesting that planning and development managers need to monitor changes in the type and needs of local people and visitors. Critical to this argument is the need to develop tourism planning strategies that will maintain or increase the motivation and the desire to visit. This may involve the demise or redevelopment of attractions that are outdated, the development of conservation programmes to maintain existing provision, the creation of new developments and activities or to undertake appropriate marketing to stave off competition. He refers to Christaller's argument that different tourist areas attract different types of tourists. To explain this diversity he applies Cohen's tourist typology. The different tourist types he identified range from those who are either 'institutionalised' or 'non-institutionalised', those who are 'drifters' or 'explorers', those who travel alone and those who can be described as part of the 'mass tourist' market.

Butler applied his 'tourist area cycle of evolution' concept to explain slumps and booms in tourism performance. If there is a marked change in tourist motivation, a destination becomes less attractive to visitors and popularity declines. This may be due to seasonality factors, a change in consumer tastes, opportunity brought about by new technology or the rise of competitor destinations. He uses the example of older resorts such as on Scotland's Firth of Clyde which reached the decline stage when it became less involved with tourism due to the rise of mass tourist destinations in the Mediterranean. Alongside this argument he uses the example of destination rejuvenation when resorts like Aviemore in Scotland targeted a winter sport market to supplement declining summer trade.

The diagram in Figure I shows Butler's adaptation of the product lifecycle to explain this.

Butler identifies a five-stage cycle of destination development that monitors tourism flows through phases of exploration, involvement, development, consolidation and stagnation. The initial period of growth and development is measured according to increasing market demand from tourists until the consolidation stage is reached. At this mature stage the destination is under

Figure I: Hypothetical Cycle of Area Evolution



Source: Butler (1980)

threat of stagnation as tourist interest declines. His diagram suggests that decline is inevitable unless there is intervention to rejuvenate the destination to maintain or increase tourist interest and demand.

More recently critics of Butler's theory have refined his model. Lundtorp and Wanhill (2001) argue that his lifecycle analysis is idealistic and represents a tourist market involved in repeat visits. Lundtorp and Wanhill argue that this trend was typical of historic tourist behaviour. They use the example of repeat domestic visits to the Isle of Man and the Island of Bornholm in Denmark which sustained popularity up to the late 1960s. Butler ignores the growth of tourism opportunity, changing tourism trends and the fast growing international market. The international travel market grew rapidly from the 1930s into the mass charter era established by the 1970s. The authors argue that the major flaw in Butler's theory is his lack of consideration of changing trends and the market who visit a destination only once.

Swarbrooke (1998) adds that tourist desire to seek out new experiences, combined with competition from new destinations, is shortening the lifecycle of established destinations and sites. Development is inconsistent therefore it can be difficult to predict what stage of development a destination is

experiencing. He raised the importance of carrying capacity by identifying six types, physical, environmental, perceptual, infrastructure, socio-economic and economic. This important aspect of sustainable development promotes preservation and conservation over maximising visitor volume.

Hovinen (2002) focuses his research on Lancaster County, Pennsylvania, a region of study used by Butler to formulate his lifecycle model. Although this destination has been important since the 1960s it was in crisis by the 1990s due to significant tourism landscape changes. These included major new leisure developments which displaced visitors from established attractions and other tourism businesses. The area has a long established heritage market. His work focuses on changing behaviour within existing markets and the rise of a range of new market segments such as the convention market. In 1995 a heritage tourism programme had been progressed to provide authentic interpretation of cultural groups such as the Amish population. By 1999 new tourism trends confirmed shopping as the primary reason one-third of visitors' chose to visit the area. Findings suggested that lifecycle analysis should focus on individual destination products rather than the destination itself. Both the heritage and conference market was viewed as attracting the more educated high spend market which was particularly desirable to target in promotion. Hovinen suggested that chaos and complexity theory would provide a useful complementary view to Butler's to help deal with the changing dynamics of tourism. For example, it would consider issues of conflict that may arise between tourism related entrepreneurial activity and planning regulations. This issue relates to Swarbrook's (1998) finding that destination management is controlled primarily by the public sector even although they control only a small proportion of the actual tourism product. He identified conflict of interests between public sector policy and the more commercialised approach required to boost tourism.

Russell and Faulkner (2004) add weight to this argument by claiming that Butler's lifecycle model is useful as a guide for investigation but fails to accommodate unanticipated impacts. The model fails to reconcile that each phase of the lifecycle is fraught with uncertain outcomes that may either stifle or further growth. They argue that entrepreneurs play a critical role in tourism development because the sector is unregulated and chaotic, making it particularly attractive for enterprise development. They focus on the attractive prospects tourism offers entrepreneurship as an under-researched area. The volume and diversity of tourism related business increases the chaotic state and unpredictability of tourism. Their work concentrates on different types of entrepreneurship as well as other types of triggers that influence tourists, like natural disasters or the threat of terrorism. They suggest that change is a constant process, caused by external and internal factors that are often unforeseen. They refer to the 'butterfly' effect when even a small change can

have a major knock on effect on the existing system. Without intervention the sector is continually on the brink of ruin when even one small change can have major impact on the product lifecycle.

A range of theorists have applied Butler's theory to help explain the performance of a specific tourism business sector or single operation. Moss, Ryan and Wagoner's (2003) empirical study of emerging and established casino markets in the United States, tested Butler's product lifecycle by applying his staged approach to casino development.

In the early first and second stages of casino expansion, seasonality was identified as having an increasing impact on the destination lifecycle. They argued that there was a correlation between poor weather conditions and a decline in gamblers. At this stage most casinos were small operations with some providing modest lodging facilities. Stage three began to emerge during the early 1990s when there was a considerable increase in casino development, particularly larger developments which became favoured by tourists. Successful intervention to rejuvenate and counteract decline led to many casinos providing significant lodging accommodation to meet the needs of the visitor market. This preceded stage four when growth in tourist demand was threatened by poor transport infrastructure which was unable to cope with increased traffic.

The industry had reached a plateau by stage five demonstrating a fairly mixed performance. Although local people provided the market for small developments there was a rash of casino closures by the mid-1990s. To increase revenue casino developments began to include other high order attractions and amenities to draw the tourist market. They argue that casino lifecycle has currently reached the fifth stage of maturity and is on the precipice of decline which will mark stage six.

Benedetto and Bojanic (1993) focus their research on the impact strategic and environmental factors had on the lifecycle of Cypress Gardens in Florida. They developed a step-logarithmic approach to modelling the lifecycle using historical attendance figures to Cypress Gardens across 35 years, that is, from November 1949 to August 1984. Their argument demonstrates how major attractions can stimulate tourism to a destination while the lifecycle of secondary attractions is much more fragile.

From the threat of stagnation Florida's tourism cycle was revitalised in 1971 with the opening of Disney World. This benefited established attractions like Cypress Gardens that experienced short-run increases in visitor numbers. Their model confirmed that the new attractions like Disney World and Sea World had a short-run positive impact on Cypress Gardens while other environmental impacts such as the missile and fuel crisis incurred a short-run decrease. Seasonality also had a significant effect on visitor numbers with the spring and summer season recording highest visit figures.

In order to adapt to the rising status of Florida as a tourist destination, management had to supplement existing provision in order to meet competition and maintain visitor interest. As a result of their work, the authors argue that the initial 'newness' of an attraction can be exploited through marketing and sustaining tourist involvement across two years before the consolidation stage is reached. Their research demonstrates that interruptions in the S-shaped curve of Butler's life cycle model can occur due to environmental factors which they estimate can incur a one-year decline in visitation. Rejuvenation strategies to maintain interest included adding a range of paid attractions with a view to extending the lifecycle of Cypress Gardens. Three of these garden developments, 'Islands', 'Ski Show' and 'Gardens of the World', incurred significant visit increases. However, other developments, Fantasy Valley and the Sports Museum, realised less significant visit increases.

Ravenscroft argues that "visits to major attractions are not based primarily on demand for a leisure experience but on a mix of motivational factors linked to leisure, culture and commerce" (Ravenscroft, Chua and Reeves, 2001, p. 156.) He uses the example of the failure of the Millennium Dome to achieve projected visitor volume. Ravenscroft argues that the Dome's developers failed to acknowledge changes in leisure behaviour and the needs of the market they were targeting.

Lennon (2001) focused his research on the impact of innovation and its role in rejuvenating the UK visitor attraction lifecycle. He argued that the attraction market had become saturated with new leisure products. In the run up to the Millennium he acknowledged a major boost in attraction developments that were funded by the European Regional Development and Heritage Lottery Funds. Over-optimistic demand forecasts and projections were related to poor performance. However, at the same time a decline in visitation to traditional stand-alone attractions was evident. His work also looked at the importance of leisure developments and retail centres that provide visitors with a variety of leisure activities. To remain competitive he recommends that traditional attractions should look towards providing multiple leisure services to include retail and catering.

Identifying Market Drivers and Monitoring Lifecycle to Counteract Decline

In order to explain the evolution of attraction development Lennon (2001) charted the lifecycle of a selection of Scottish visitor attractions that secured more than 10,000 annual visits across a period of up to ten years from 1988 to 1998. Findings identified an initial period of growth in the first two years of opening, declining to consolidated average attendance levels by year four. He identified that paid admission attractions managed to retain a higher degree of growth and stability across the four years than those with free access. Lack of innovation and investment was more evident within the paid sector which

helped explain this. A revival in year four was identified in attractions that had counteracted decline through refurbishment and/or marketing. Only a minority of attractions planned beyond year four and sustained year-on-year growth through consistent innovation, product diversification, upgrade and development.

The European Commission (2002) has pulled together arguments on destination lifecycle and management to help tourism managers develop sustainable strategies to prevent destination decline (European Commission, 2002). The report highlights the need for tourism destinations to provide a differentiated package of tourism products that are coherent with the range of market niches being targeted. It recommends establishing a monitoring system to measure the effectiveness of policy. This monitoring process will test policy effectiveness and identify violations. Testing will measure performance against preset performance indicators under the following four variables,

- *Input* resources and people
- *Output* performance of resources and people
- *Outcome* results e.g. achievements and violations
- *Environment* external factors

The performance indicators would be measurable, such as visitor flows, spend and length of stay, which would provide an early warning of imminent decline. The quality of tourism activities and exogenous factors such as terrorism or fuel costs would also be used as indicators that threaten tourism. Monitoring would be used to identify threats to inform a rejuvenation strategy that would strive to develop a more effective tourism profile. The general message to tourism managers is to monitor progress, measure performance, identify early warning signs and prevent decline through appropriate intervention such as management change or product development.

Presentation and Analysis of Data

Various internal and external factors have had major impacts on the visitor attraction lifecycle across the ten-year period from 1994 to 2003. Some of these have persisted while others are unanticipated. Table II shows key market drivers which have proved to have a significant bearing on the performance of museums in Scotland across a ten-year lifecycle.

Each year reasons related to the weather were reported as one of the most important factor influencing concentration of visitors. Other most important reasons included travel related costs and the strength of sterling which suggested Scotland as an expensive destination. Marketing, innovation, capital investment, local events and exhibitions also had a significant influence on visitor flows. Other market drivers had isolated impacts on a specific year's

Table II: Market Drivers Impacting on the Performance of Scottish Visitor Attractions

Positive	Negative
Marketing	Weather
Special Events	Strength of Sterling
Signage	Financial insecurity
New/Temporary Exhibitions/Displays	Cost of fuel
Weather	Catering/retail
Increase opening hours	Fewer of specific niche e.g. USA visitors, coach parties, schools etc
Price change	Poor Signage
Increase in specific market niche, more coaches, more schools	Competition
New facilities/services e.g. catering, retail, activities for children	Lack of Marketing
Special Offers	Lack of innovation
Increase Hours	Closure/repairs/development etc
Improved access e.g. for disabled	Shorter opening hours
Price change	Price change
Capital Investment	Political e.g. terrorist threat
New staff e.g. management, marketing	Other exogenous e.g. FMD

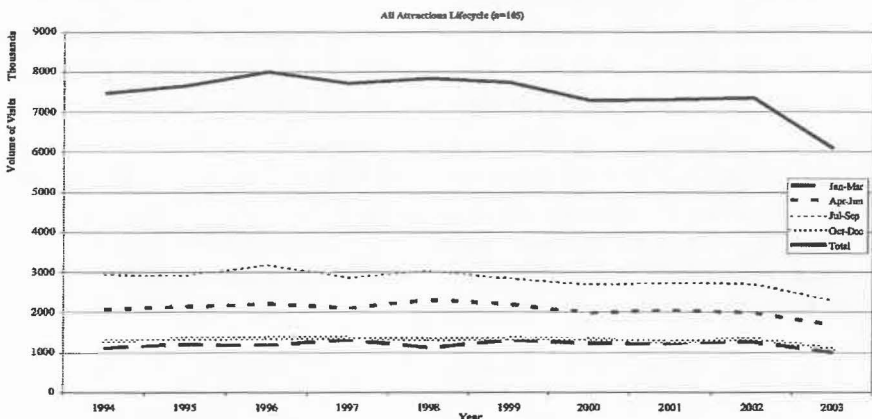
performance. They included major museum developments, particularly in celebration of the Millennium, the foot and mouth disease epidemic of 2001¹ and the threat of terrorism. These market drivers help explain lifecycle curves and seasonal variations in visits highlighted in the next section.

Visitor Attraction Lifecycle Curves

The lifecycle curve shown in Figure II represents the 105 Scottish attractions that provided data across the ten-year period 1994-2003.

Growth peaks in 1996 followed by a steady decline in visitation, which by year 2000 falls below the volume of visits realised in 1994. Note the sharp decline

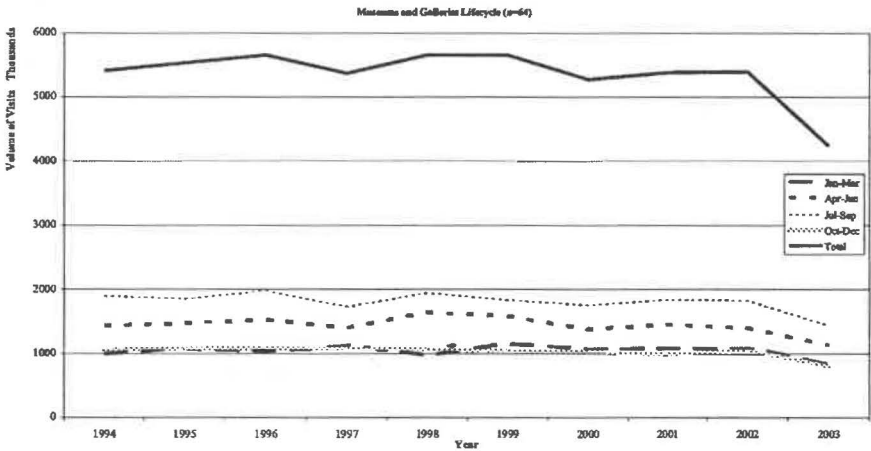
Figure II: All Attractions: Lifecycle Curve 1994-2003



experienced in year 2003. The quarterly lifecycle curves show the importance of the summer and spring season with much lower concentrations of visits being experienced in the shoulder months of January to March and October to December.

The lifecycle curve shown in Figure III represents all 64 museums and galleries that provided data across the ten-year period.

Figure III: Museums and Galleries: Lifecycle Curve 1994-2003

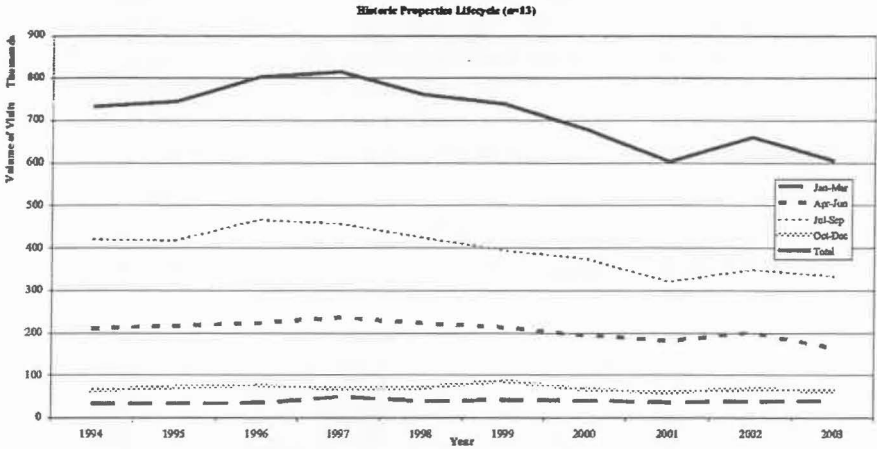


Due to the prominence of the museum sector in terms of number of organisations and high visitor flows the museum lifecycle would be expected to shape the curve for all attractions. However, decline appears more prominent for museums in 1997 with rejuvenation clearly evident in 1998 mirroring levels achieved in 1996. Note how the strong performance during the period April to September influences this finding.

For contrast purposes, Figure IV shows how significantly different the lifecycle curve is for historic properties when compared to that representing museums. Historic properties include historic houses, castles and monuments.

Historic properties peak in 1997 falling steadily to an all-time low in 2001. Marginal growth in 2002 is not sustained with decline evident the following year. Note the highly seasonal aspect of the sector with the majority of visits being secured in the summer season July to September. The prevalence of attraction closure during the shoulder months, January to April and October to December, accounts for low level visitation during both quarters.

Figure IV: Historic Properties: Lifecycle Curve 1994-2003



Museum Case Studies

The following case studies show the lifecycle of individual museum attractions that provided data across the ten-year period 1994 to 2003. They have all year round opening and show seasonal variations in visitor volume.

The first case study looks at the lifecycle curve of one of the most visited museums in Scotland which is located in a major tourist honey pot.

Figure V: Major Museum: Lifecycle Curve 1994-2003

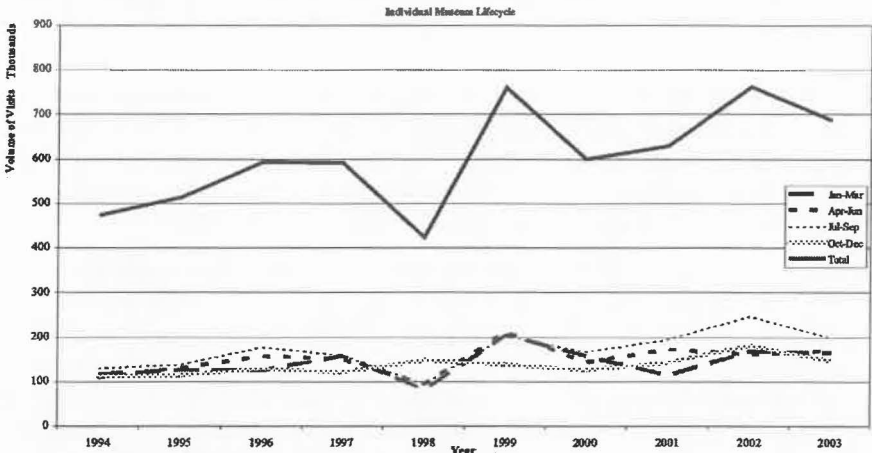


Figure V, the ten-year lifecycle curve shows annual visits consolidate at around the £600,000 mark. However, it is quite striking how visitor volume declines sharply in 1998 followed by a sharp spurt in growth during the following year.

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Although visits decline to consolidate in 2000, recovery is realised in 2002 only to decline again in 2003. The seasonal curves show that shifts in visits from 1997 to 2000 occur from January to September yet recovery by 2002 shows the importance of popularity during the summer months. Interestingly visitor flows between October and December remain fairly static across the ten-year period. Note the sharp decline in visits experienced in 2003.

Figure VI shows monthly visits and critical market drivers that help explain year-on-year performance trends. Although not positioned to scale, the lifecycle curve has been superimposed on the table to show major slumps and booms in visitation.

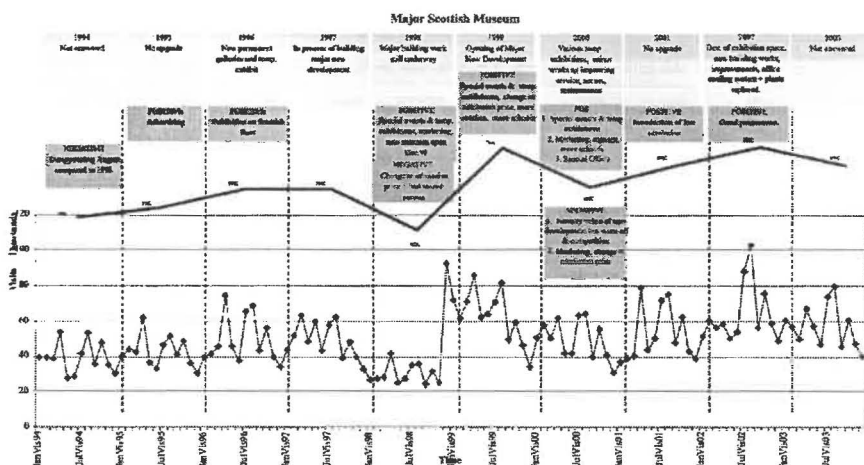
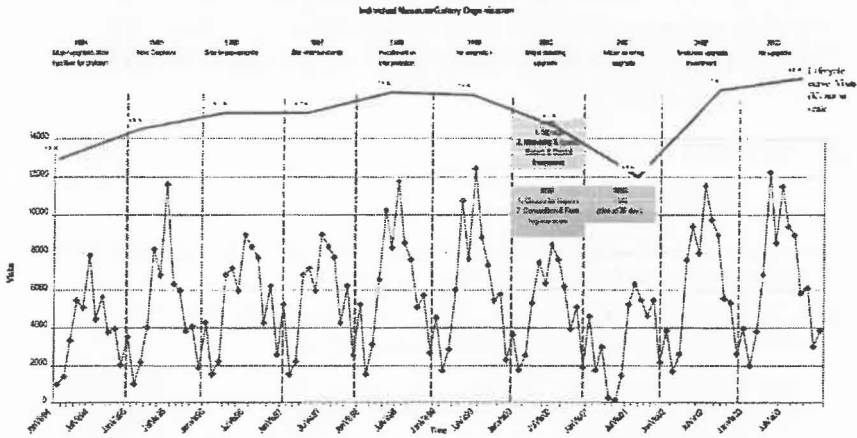


Figure VI confirms Lennon's (2002) argument that investment in marketing and innovation stimulate growth and increase popularity. However, it also shows the radical impact on visitor volume of major new development from building to opening it to the public. Changes in admission charges in 1998 and 2000 also had similarly dramatic impacts on visitor flows.

The second case study demonstrates how an unanticipated naturally occurring crisis negatively affected one museum operation. Foot and mouth disease (FMD) reached epidemic proportions during the winter season of 2001 devastating animal farming across Scotland. The epidemic led to a significant unanticipated downturn in visits to visitor attractions located in rural settings and involved in many cases complete closure. However, the tendency for museum organisations to be located in towns and cities led to displacement of visits from rural attractions resulting in increases in museum visitation. Museum and galleries who suffered visit losses tended to be those whose access and transport routes were affected by regional access closure or restrictions.

Figure VII: Individual Museum: Lifecycle, Performance and Market Drivers 1994-2003



The performance of this museum organisation suggests sustained growth as the lifecycle curve shown in Figure VII experiences a fairly steady rise across the initial five-year period 1994-1999. However, what is striking about this table is the impact closure has on visitor volume. In the first instance, in 2000, losses were incurred following closure for repairs but were compensated marginally by increases in publicity and special events. However, the unanticipated impact of the FMD epidemic shows a significant decline in visits from January to July 2001. However, recovery occurred fairly rapid during the following two years. Note the rise in visits during 2003, which is not typical of the sharp decline in aggregated analysis for the sector.

Conclusion

This paper builds on the work undertaken by Lennon (2001) and argues that the lifecycle of organisations operating within the visitor attraction sector are vulnerable to stagnation and decline due to the highly chaotic internal and external environment within which they operate. The concept of tourist destination lifecycle has helped explain visitor attraction performance as an evolutionary process. However by applying the findings of the critique of lifecycle analysis to historical visitor attraction data, this evidence has suggested a whole raft of market drivers that threaten future progress. The persistence and the extent of this threat clearly suggest that attractions operate in a highly chaotic environment. The case study examples have only touched on the impact market drivers have had on the performance experience of individual museums and galleries. From this basis the idea is to progress research to explore the scope of causal factors in more depth. These will include more emphasis on the sector’s unique dilemmas emerging from policy, funding and staffing. It is expected that this research will strive to develop a model of sustainable

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development for attractions. This model will ultimately help inform visitor attraction managers and help them build a strategy to help combat decline. This will provide a useful tool for future planning and development as well as for forecasting performance.

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¹ Foot and mouth disease is a highly contagious infection spread among cloven-hooved animals.

