

Volume 2 Number 2, 2004

ISSN : 0972-7787

JOURNAL OF  
**Hospitality**  
&  
**Tourism**



Culture & Environment  
Conservation Society



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Journal of Hospitality & Tourism  
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April, August & December

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## Editor's Dais



Heritage and Culture constitute vital resources for tourism development, and tourism in turn makes an important contribution to cultural development. The word heritage includes both cultural and natural elements. In the cultural context, heritage describes both material and immaterial forms, e.g. artifacts, monuments, historical remains, buildings, architecture, philosophy, traditions, celebrations, historic events, distinctive ways of life, literature, folklore or education. Heritage means "something transferred from one generation to another". In the natural context, heritage includes landscapes, gardens, parks, wilderness, mountains, rivers, islands, flora and fauna. Natural heritage also has cultural components, since its value is dependent on subjective human assessment.

Our present issue is devoted to Heritage Tourism, which is an effort of Dr David M. Silbergh and Dr Peter K. Falconer put up their sincere devotion for current issue. In future we will come up with some more special issues related to specific theme. From 2005 **JOHAT** will be published thrice in a year. Suggestions are always welcomed for the improvement of quality.

A handwritten signature in black ink, appearing to read 'Mukesh Ranga', with several diagonal lines drawn over it.

(Mukesh Ranga)



## Editorial

This special themed issue of the *Journal of Hospitality and Tourism* has been put together by a team of research colleagues at Glasgow Caledonian University in the United Kingdom, based around the theme of "Contemporary Perspectives on Heritage and Tourism". We are particularly lucky to have within this special issue contributions from both Prof. John Lennon and Prof. Malcolm Foley, who together are world-renowned for their work on Dark Tourism. This issue contains contributions from staff working in both the Caledonian Business School and the School of Law & Social Sciences, and spans a range of subject areas including heritage and the historic environment, cultural theory and management, museums and galleries, tourism business development and management and public policy and management. The papers contained within this special themed issue aim to provide critical perspectives on key issues facing those engaged in managing within and undertaking research into the heritage and tourism industries today, and all papers are based on the outputs of recent research.

The first paper is by Dr Ian Baxter, whose contemporary perspective begins by explaining both the conceptual shift that has happened in recent years in relation to 'the historic environment' vis-à-vis 'heritage'. He then addresses the growth of professional strategic management in the tourism and historic environment fields. Having established a hypothesis that these two issues are not simply co-terminous in time, he goes on to argue that they are in fact critically inter-related and that this inter-relationship can be seen most clearly in lessons learned by those working in the historic environment, ultimately leading to benefits for tourists as historic environment consumers.

The second contribution is by Dr Peter Falconer, whose contemporary perspective suggests that the cultural heritage sector in Scotland, which has for many years been largely run as a traditional public service, is entering a period of change. Dr Falconer outlines the move towards increased reliance on partnership working between public, private and voluntary sectors that has been seen in the UK and Scotland in relation to public service delivery. He then goes on to examine recent policy developments in relation to cultural heritage in Scotland and chooses to focus on the case of museums and galleries. Although, as he notes, the partnership agenda is better-developed in other public service areas, his analysis of recent cultural heritage policy does bring him to the conclusion that in the search for enhanced efficiency and effectiveness, "the cultural heritage sector too will increasingly move forward in the coming years within the organisational context of more partnership and network-oriented working."

Prof. Malcolm Foley and Dr Gayle McPherson's contemporary perspective examines the spectacle of 'Edinburgh's Hogmanay' and is based on a programme of research that has studied this event's operation from its formalisation in 1996. Foley and McPherson explain the cultural significance of Hogmanay in

Scotland, and trace the story of the unplanned yet large-scale development of public celebration of it in Edinburgh, Scotland's capital. In the 1990s, against a background of concern for public safety and in conjunction with the hosting of a European Summit, the public authorities sought to gain control over the Hogmanay festivities, and have now created a powerful 'Edinburgh's Hogmanay' image, one that is attractive to local participants, broadcasters, tourists and the police alike. Foley and McPherson analyse the Hogmanay event from the perspective of all of the key players, drawing the conclusion that, "the event confidently asserts Edinburgh as the home of the Hogmanay festival which is now global in its penetration and observance, and brands it alongside other global cities".

Dr Mary-Cate Garden's contemporary perspective addresses methodological issues and seeks to establish a new means of identifying how and why some heritage sites (or component parts of sites) 'work' for tourists and other visitors when other sites (or their component parts) don't. Her paper is highly relevant to today's tourism and heritage industries, developing as it does her notion of heritagescapes, which is both a conceptual framework and a practical tool for research and analysis that can be used by both academics and site managers. Dr Garden's paper draws on an extensive programme of research undertaken in a variety of countries, and uses case studies of four open-air museums in England, Denmark, the USA and Sweden to demonstrate the validity and versatility of the heritagescape method as a tool for helping to develop fulfilling visitor experiences.

Dr Margaret Graham and Ms Clare Bereziat's paper is, like that of Dr Garden, one which provides a contemporary perspective on methodological issues. Once again, innovative proposals are developed for understanding and predicting the perceptions of tourists and other visitors, as to whether attractions 'work' (in this case focusing on museums and galleries). The authors take Butler's well-known lifecycle approach as their starting point and review this in light of works by others, including Prof. John Lennon, whose thesis is explained by Graham and Bereziat as being, "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." Building on the work of Lennon, they present empirical data that support his thesis and argue that planning / re-developing attractions so that they 'work' for visitors is a highly complex task that must be based on an assessment of multiple variables in a chaotic environment.

Dr Catherine Matheson's contemporary perspective involves a social scientific analysis of festivities and tourism commodification. This paper provides the reader with a cohesive and timeous theoretical framework to aid understanding of festivities, the organisation of which plays a major part in the tourism strategies of towns and cities around the globe (for example, Edinburgh). In building her theoretical framework, she draws on a range of cultural, leisure and tourism theories and from these develops the proposition that, "tourism processes reflect broader social changes within society and the consumption

of festivities offers insights into identity creation, thereby contributing to an understanding of the arena of tourist lifestyles.” Dr Matheson examines the role of festivities in today’s world of commodified tourism, and goes on to suggest that such festivities can in fact be used by host communities as a means of providing an authentic cultural experience, even as part and parcel of a commodified tourism product.

The contemporary perspective provided by the Guest Editors of this special themed issue, Dr David Silbergh and Dr Peter Falconer, has a thrust similar to that found in Dr Baxter’s paper. Again, there is a focus on the interconnectedness of heritage policy and management and the tourism sphere and, additionally in the Silbergh and Falconer paper, the social policy sphere too. Using objective data, they argue that policies designed to increase social cohesion by using State money to subsidise free entry to museums and other heritage assets may in fact achieve little more than a redistribution of scarce resources away from valuable heritage conservation and tourism development objectives and indeed away from core elements of social inclusion policy itself.

The final paper, by Mr Craig Wight and Prof. John Lennon, focuses on research into the Imperial War Museum of the North in Manchester, which was opened in 2002 and which has been widely-debated in the UK media (it is an example of one of those heritage assets to which entry is free as per the paper by Silbergh and Falconer). Wight and Lennon’s contemporary perspective builds on Prof. Lennon’s seminal works on Dark Tourism and they set out to test the hypothesis that, “visitor perceptions of ‘dark’ issues in museum can be influenced using commentary and ‘live interpretation’.” Using a range of data from a study conducted in 2004, the authors find evidence to support their hypothesis, which by extension may have significance for professionals grappling with the special difficulties involved in interpreting Dark Tourism sites “within the bounds of veracity and appropriateness” as the authors put it.

We hope that you enjoy reading this special themed issue of the Journal of Hospitality and Tourism and would like to take this opportunity to acknowledge Mr Ruben Spreeuwers for his considerable efforts in helping us with editing the papers. Finally, we do, of course, also wish to record our sincere and heartfelt thanks to Dr Mukesh Ranga, both for inviting us to prepare this special issue and for his generous assistance and advice throughout the process.

(David M. Silbergh)

(Peter K. Falconer)





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Volume 2, No.2., 2004

ISSN No.: 0972-7787

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# From Heritage to Historic Environment: Professionalising the Experience of the Past for Visitors

Ian Baxter

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**Abstract:** The heritage sector in the UK has seen unprecedented change over the past decade as a result of changes in: Government attitude toward and intervention in the sector; new funding mechanisms; changes to legislation and policy; new methods of interpretation; and, in particular, the growing dynamism in the relationship between the sector and other sectors which utilise heritage as a resource. In this paper, changes in the utilisation of heritage as a resource for tourism will be reviewed, highlighting broad areas of common change and development, and will point to the notion of 'professionalisation' as the unacknowledged facilitator in the sectors' current respective trajectories.

**Keywords:** Heritage, historic environment, professionalisation, visitor attractions, resource management, organisational change.

## The Heritage Sector

Heritage is, at the same time, both a simple and complex concept. Many academic texts in recent years have striven to place heritage into the realm of academy as a subject in its own right (Carman, 2002; Howard, 2003), or at least to develop a body of theory which can account for its multivariant form and titular application to places, structures, items and objects which might otherwise be deemed the intellectual property of the museum curator, the architect or the historian (Graham et al, 2000; Merriman, 2004). For all the intellectual argument over the form and content of heritage as subject, it is in the practical application of heritage terminology and heritage procedure that has given the greatest body of evidence for defining heritage's role and *raison d'être* in a personal, professional, subjective and objective context. Thus, 'classic' heritage texts, typified in the past by Cleere (1984), Lowenthal (1985), Wright (1985), Hewison (1987) and more recently by Lowenthal (1998), Clark (2001) and Aplin (2002) show a clear divide in approach between heritage as applied history and heritage as historic resource.

Intellectual development of the subject aside, the historic and cultural connotations of heritage as place, heritage as identity, and the notion of the 'heritagescape' (Garden, 2004 - see also her paper within this issue) means that it has found its place in the modern world by acting as a socio-cultural resource for other interests and within business contexts. If perceived wisdom is accepted that definition of heritage is fraught with difficulty (Skeates, 2000), and one ignores those tortuous definitional arguments, taking heritage at its face value

highlights its place in official, unofficial, professional and personal parlance. At once, nobody can define exactly what heritage is, and yet everybody instinctively knows what is part of 'their' (personal or national, and even international) heritage. As this paper discusses, the democratising influence of management as a science and the inherent professionalism which it brings when applied to heritage, has also democratised heritage. Ownership of those historic and cultural connotations has never been easier, whether or not those owners have a legitimate right or authentic link to that past. In the UK, the heritage label is clearly seen in public life – ranging from application to organisations such as the Government's English conservation advisors (English Heritage) to the lottery-money distributor, the Heritage Lottery Fund. Central Government even established a Ministry called the Department for National Heritage in the late 1980s, with a broad cultural remit stretching from sport to arts and media. (It was later renamed for political reasons as the Department for Culture, Media & Sport when New Labour came to power in 1997).

### **Where did the Historic Environment come From?**

Persistent problems of definition spilling out from the academy, combined with the progress of management outwith as well as within the sector (as well as management more generally as a discipline (Baxter, forthcoming)) have given rise to a new moniker for the sector, which is now used more generally than 'heritage' – that of 'the historic environment'. This term has existed for some while (Baker 1983; Baxter 2003), though only recently has come into standard use in professional practice. This seemingly innocuous name change has achieved a number of things. Firstly, it has clearly differentiated the academic consideration of heritage from the professional practice of managing the historic environment. Secondly, it acknowledges clearly the role of proactive management and need for strategic direction and purpose within the sector, by recognising that heritage assets are part of a broader physical context which must be considered as a whole environment. This second effect has also placed the sector on a par with other 'environmental' disciplines with more developed management structures (and better public perception of what the sector does), i.e. natural environment and built environment. Environmental 'assets' can thus be identified, compared and valued (Countryside Agency, 2003). Thirdly, the tautological differences between conservation and preservation, and whether management of heritage assets is a barrier to development is removed (Kincaid, 2002). Administration and application of backward-looking heritage protection legislation thus becomes (in concept and perception if nothing else) modern and focused, valuing heritage assets amongst other aspects of our everyday habitat.

Most importantly, for the context of this paper, is that a change from heritage to historic environment has placed the sector at the heart of tourism

development and community regeneration, both as a stakeholder and strategic leader in the process, rather than simply as a provider of an asset for exploitation by tourism or other sector managers. It would be naïve to suggest that a simple re-branding of the sector from heritage to historic environment has brought about such a profound change, not least as there is no one organisation which directs heritage management in the UK, but usage of the term can be measured incrementally against equivalent changes to management structures, attitudes, treatment and acceptance of the role the sector can play as its external environment has changed over the past five years. It has also potentially brought scope for clarity of thinking about the wider role of heritage within society, acknowledging the interplay of the relationships between practical and theoretical considerations of historic assets existing in the modern world. Essentially, with heritage now being valued in differing ways (de la Torre, 2002; NERA, 2003; Jowell, 2004) management of the historic environment in the UK can now be compared more readily with Cultural Resource Management in the USA (King, 1998) and Australia (Australian Heritage Commission, 2003).

### **A Hypothesis on the External Perception of Internal Change**

The preceding sections have briefly summarised certain issues relating to the change in the sector which relate to terminological change from heritage to historic environment. However, it is important to recognise that this change is an internal management transformation which represents change behind the scenes in the sector (Baxter, 2002). It must be questioned whether such a label change has either been noticed externally by an external 'consumer' of sectoral products and, more importantly, whether an overall change of approach in management within the sector, due to internal and external pressures (and typified by this change in terminology) has affected the relationship between historic environment manager and product consumer. If, as has been hypothesised, a change in nomenclature is representative of a far wider-reaching change, then it should be tested at the consumer interface, where consumer reaction is most obvious.

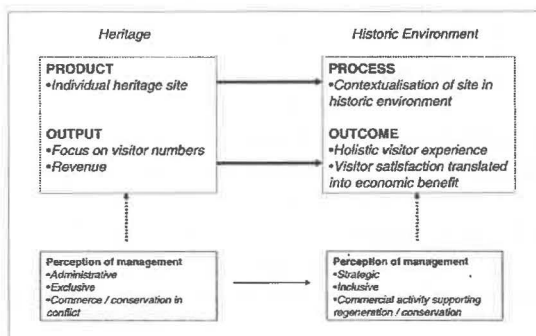
This is perhaps most obviously tested in the allied tourism sector, which arguably, in the UK, is underpinned by heritage products in the form of historic sites, monuments and the varied architecture which makes up street- and townscapes (BEFS, 2004). As within the core disciplines of archaeology, architecture etc. themselves, individual sites, buildings and monuments are now considered as a part of the wider physical environment, and as providing the historic dimensions to it. 'Characterisation' is the process by which identification and value of those historic features is most usually undertaken (Fairclough & Rippon, 2002). Individual heritage sites thus provide the main reason for visiting many of the UK's towns and cities, and the historic environment

## From Heritage to Historic Environment: Professionalising the Experience

therefore provides the backdrop to touristic activity within the cultural sphere (Richards, 2001; Timothy and Boyd, 2003). Two questions are foremost in examining the changing relationship between the historic environment (*née* heritage) and tourism (cultural tourism in particular) – firstly – what is the role that heritage now plays in tourism, as influenced by the new approach in its own sectoral management? Secondly, what is the implication of this newly developing role for the consumer or visitor?

What is therefore being suggested in the relationship is that a change can indeed be seen from simple administration of the heritage resource to a more sophisticated form of strategically managing the relationship of the resource and the resource user, and that this incremental change over many years has reached a critical point where the shift in balance can be clearly noted. The historic resource: the castle; museum; archaeological site; and even the listed building in the High Street is thus no longer treated as a static product for consumption and contemplation out of context from its surroundings. The tourist now has the option to consume (*ipse dixit* Urry, 1995) the product as part of a process of immersion in the historic environment / the past at a particular geographic location. This closely reflects the wider trend in tourism and site interpretation, focusing on providing for the visitor an immersive or authentic experience (Midtgard, 2003; Shaw & Williams, 2004). Internally, within the sector, the feedback to management strategy of heritage visitor attractions moves from visitor numbers as an output towards enhancement of the visitor experience as an outcome. This subtle shift seen towards soft targets for organisations, such as the governmental heritage agencies (English Heritage, 2003; Audit Scotland, 2004) in turn enhances the view of management of the resource, with a greater appreciation by visitors and the wider public of the necessities of commercial utilisation of heritage. The change in approach is shown diagrammatically in Figure I.

**Figure I: Actual and Perceived Change in Relationship between Historic Visitor Attraction Management and Consumer Understanding**



The visitor, as borne out in surveys conducted both within the confines of heritage sites and in other locations (MORI, 2000; MORI, 2001; Historic Scotland, 2003), is being given the opportunity to react and interact with heritage and the historic environment in new ways. Visitors are no longer treated as an homogenous group, but as users of a resource with specific defined needs (within the standard course of behaviour for touristic activity) as well as undetermined needs which may be fulfilled by heritage site operators who may offer 'bonus' experiences which appeal to a particular visitor segment (in turn generating additional income for the site operation, and enhancing satisfaction levels) (VisitScotland, 2004a). None of this should come as any surprise to management operations and organisations accustomed to operating as a full part of the tourism sector, however, heritage management is only now beginning to fully recognise its role within the tourism sector, and has never truly professionalised the relationship between the sectors, fully appreciating the demands within the leisure service sector.

### **Professionalisation of Heritage Tourism**

Professionalisation of the relationship between heritage and tourism has come largely by impetus from the tourism sector and changes brought about over the past decade in terms of both demographic demand for and expectation of its products and changes in the structure and infrastructure of the industry (dealt with at length elsewhere, such as Page et al, 2001). Heritage tourism, as a focused variant of cultural tourism (Timothy & Boyd op. cit.) has led to refinement in definition of visitor attractions, to include heritage visitor attractions as an identifiable cohesive grouping (Millar, 1999). These in turn can be broken down into a variety of different types of site and tourist experience, sub-groupings large enough to provide vital management information in the form of visitor statistics and revenue trends which typify the step-change in the tourist industry to base decision-making and development around a firm evidence base. The intricacies of the development of management information (statistical) are also considered elsewhere (Baxter, 2003), with their necessity due to recognising the role that tourism is an industry suffering from high levels of fragmentation and yet providing a huge economic mainstay for national economies on a global basis (WTO, 2003). Thus, as tourism management information has become sophisticated, by default information on heritage sites (where touristic activity takes place) has also become highly sophisticated. Typical of this are the surveys of visits to visitor attractions, undertaken by the national tourist boards in the constituent UK countries (VisitBritain, 2002; VisitScotland, 2004b). The importance of heritage sites can be seen at first glance of the league tables of visitor numbers at the top performing sites. Indeed, it is from tourism statistical sources that claims can be made for heritage providing the backbone of the tourism industry in each nation (VisitBritain, op. cit.).

This sophistication in information, and identification of niche tourism markets over the past five years has been a parallel development with calls for evidence-based policy making across the public sector (which is the largest 'producer' of the heritage resource in the UK) (DCMS, 2004a). As Culture has established its place in the portfolio of Central Government ministries, so the spotlight has finally fallen on the so-called 'cultural industries' (DCMS, 2004b) to fully account for public support which it receives through the taxation system. Arts, crafts, museums and galleries arguably developed systems of accountability first in the cultural grouping, leaving the disparate heritage sector (a huge group of NDPBs, NGOs, local organisations and small private operators) on the back foot when it came to arguing for public support. Furthermore, whilst heritage was beginning to place its individual sites and objects into broader contexts of landscapes and historic environments, the natural environment sector (which shared those '-scapes') was heralding its achievements and justification for support through high profile 'State of . .' audits (Countryside Agency, 2004; English Nature, 2004). The heritage sector has therefore been playing a game of catch-up with both of its main linked sectors (natural environment and tourism) in terms of accountability, profile, presentation and strategic thinking.

The complicated picture is further confused by adding in the wider Government ideals of sustainability, social inclusion, community regeneration and economic stability, which are at the heart of New Labour thinking, and which are expected to be translated through Central Government Departments into the respective public and private sectors. Across all areas of the heritage sector there has been common thinking that it could as a sector deliver on these issues – but it needed to get its strategic thinking and management information systems in order. With some degree of effort, including huge investment by public organisations such as English Heritage and the Heritage Lottery Fund (in England), progress has been made on catching up – exemplified in the development of State of the Historic Environment Reports by English Heritage (English Heritage, 2002a, 2003; Baxter, 2003). It is unsurprising to note that the tourism management information pertinent to heritage sites provided the largest and most robust datasets in the pilot reporting (Baxter *ibid.*) given the faster development of strategy and requirements for currency in management information in the allied tourism sector.

### **Recognising the Contribution of Heritage to Tourism**

As already noted, there is no single factor which has brought about the levels of increased professionalisation in heritage management, but more a critical mass of expectations placed on the heritage sector stemming from academic development within and external pressures outwith. In recognising heritage as a historic environment, a historic overlay to our everyday habitat, there is reinforcement away from management of individual elements in isolation, to

a focus on the way in which the past is experienced in differing physical forms around us. Those physical forms of heritage, in the majority of cases by virtue of projected image and perception, are the heritage visitor attractions which we know of through individual expectation or as a generic resource group. Stonehenge, The Tower of London, Edinburgh Castle, Chatsworth and St Paul's Cathedral thus continue to be individually known as tourist itinerary hotspots. As a generic resource group, archaeological sites, palaces, castles, stately homes and cathedrals, are groupings with their own characteristics and significance which can be studied to provide insight into the experience that a visitor can expect at a certain kind of site in a certain kind of place.

This is an experiential approach which is bound closely to the successful development of niches within heritage tourism geared around historic locations and destinations, and also thematic niches which link social motivation and appropriate physical experiential tourist resource (such as genealogical tourism (McCain & Ray, 2003)). Within the academy, subject development has also seen a rise in appreciation of the sociological experience of place and space, through disciplines including archaeology, architecture, cultural studies and anthropology (such as National Trust, 1995 or Bender, 2001). From a tourism industry perspective, the driving forces in the definition of the heritage tourism subgroup include: the growth of niche tourism (Page et al op. cit.); post-industrial regeneration of urban areas for tourism purposes (Liverpool City Council, 2004); heritage visitor attraction development (and adaptive re-use of historic buildings) (Kincaid op. cit.); legible city initiatives (Bristol City Council, 2001); lottery development and Millennium investment in new attractions (HLF, 2004); development in cultural interpretation and use of technology; and, service quality enhancements (Drummond, 2001). These external driving forces have affected the managing agencies within the heritage sector substantially due to the fact that the sector's portfolio of sites (and key location of public interaction with the sector) has effectively been reconfigured from a standpoint geared around the consumer, rather than the overarching conservation ethic as applied to a site. Fuelled by media interest, the public in recent years has increasingly questioned (from an inquisitive rather than critical standpoint) how the heritage is preserved, what is preserved, and what is presented about it. British television series such as 'Time Team', 'Time Flyers', 'The House Detectives' and most recently 'Restoration' have put practical heritage management in the limelight. The enduring appeal of the television costume drama, nostalgic light entertainment such as 'Monarch of the Glen' and the increased filming of period novels such as 'Gosford Park' has brought an explosion of interest in experiencing the past as seen on the small or large screen. The sophisticated tourist has an increasingly well developed set of requirements for their heritage experience, and the heritage visitor attraction sector is expected to professionally deliver an enduring experience of history and the past. The combined pressure of tourist interest balanced with



conservation need for investment has required such professionalisation of engagement between heritage managers and tourism developers – and more often a synergising of these skills within the same organisation.

### **Current Expectations placed on Heritage Visitor Attraction Operators**

The tourist attraction stock as has been shown has become increasingly differentiated and through ongoing new development and reinvestment is subject to increasing levels of competition between sites (Yale, 1998). Heritage visitor attractions as a subgroup of tourist attraction are no exception, and whilst mindful of the broader cultural goals for the heritage sector, where sites contribute to our understanding of society and its past, management of the stock of historic buildings and monuments can no longer be on a privileged ‘showcase of the physical past’ basis. Regardless of the statutory or moral duties of the organisation which manages the site (which here includes private owners), heritage sites are in the same arena as other tourist activity sites and locations for leisure pursuits. In certain respects, the removal of the conceptual ‘picket fence’ from around many of the country’s historic sites (the boundary that divides past historic environment from present environment), means they are considered as just another part of the broad historic environment and has made the job of competing in the tourist market more difficult. Blending in to provide the heritage backdrop for urban and rural destinations therefore has a potentially disadvantageous side for heritage commercial tourism success.

One of the ways around this dilemma is to build a relationship between the heritage organisation and the consumer, using organisational channels rather than relying on the appeal of individual sites on an off-chance or itinerary basis. This requires a thoroughly business-oriented strategic approach to managing the tourism offering, and places the interaction with the tourism sector at the heart of any developmental strategy for a heritage organisation. This has been seen as a major developmental goal in the large heritage organisations over the past 4-5 years, led by the charitable organisations which are do not have a financial cushion from the public purse. The National Trust and National Trust for Scotland have undertaken brand development work, and are increasingly engaging the public in their organisations’ work through specialised audience engagement projects such as the Ben Lawers Historic Landscape Survey (see [www.benlawers.org.uk](http://www.benlawers.org.uk)). Equally, sites in their care are seeing increasing emphasis on interpretation and visitor service development, to attract and retain visitors for longer periods than the 61 minutes which are on average spent at a site (English Heritage, 2002a: 55). Equally, the public sector heritage organisations, including Historic Scotland, English Heritage, Cadw, Historic Royal Palaces and the Royal Parks Agency are increasingly concerned with their brand image, and have invested heavily in organisational

marketing and promotional campaigns as well as site improvements (reported in respective organisational annual reports).

The private sector heritage owners and operators, which is by far the most reliant on the market forces acting within tourism have also boosted their collective management support, through increasing diversity in activity and advocacy of their representative body, the Historic Houses Association. It has centrally developed marketing tools on its website (see [www.hha.org.uk](http://www.hha.org.uk)), has increased its regional campaigning work in devolved areas (Hervey-Bathurst, 2004) and is playing an active co-ordinating role in the developing strategic and research agendas for the sector and disseminating best practice work (BEN, 2004; Waterfield, 2004). It is worth remembering that the majority of heritage sites utilised for tourism visits were never intended for such use, and as such are subject to physical demands as well as the more general pressure of desire to visit by tourists.

Therefore, through major programmes of marketing, heritage brands have been developed by respective conservation organisations, providing a further relationship channel with the public that can last longer than the individual site visit. These brands have been extended through to membership schemes – the most enduringly successful being the National Trust with some 3.3 million members (National Trust, 2004). Museums and galleries, which need to be considered slightly differently to heritage sites for a variety of reasons (Dunlop et al, 2004) are also using ‘Friends’ schemes, which have attracted large numbers of supporters, developed as a core group of repeat visitors and therefore repeat revenue streams. This brand development is particularly important in the development of information distribution channels (advertising and interpretation) on the internet. This corporate image of heritage thus professionalised again places the sector on the same footing as other tourism businesses attempting to attract visitors and income.

This dynamic development over the past five years which has been seen between the heritage sector and the tourism sector has been aided by the policy clustering within the DCMS, and the increasingly business-minded focus for that Department (DCMS, 2004c). As the Government encourages its Agencies to engage with its socio-political priorities (already discussed), so the heritage sector which is dominated by the public sector as a consequence of market failure (NERA op. cit.) is required to minimise that reliance on public support by synergising further with commercially successful policy areas (i.e. tourism).

The key expectations placed on heritage visitor attraction operators can be summed up as the requirement to provide an improved experience in accord with developments across the tourism industry, reflecting consumer demand for value, quality and enjoyment. These three desires can be matched in public policy terms by the expectations placed by Government on the sector for access,

inclusion and minimisation of direct financial support from the taxpayer. The change in approach to management therefore has to have an in-built desire to deliver value for money and a high quality experience. Heritage sites are not accepted by either Government or the visiting public in their traditional form as austere, unwelcoming monuments with few visitor services and little interpretation. The democratisation of heritage as a historic environment owned by everybody has meant that the management ethos has changed to address the changing public need and also the commercial imperative (through competing in a leisure market, and also being required to minimise the costs of support for a social good).

Actual change at sites has been large-scale and widespread fulfilling visitor needs established as norms for attractions (Caulton, 1999). With access at the heart of tourism planning (Hall, 2000), sites have improved the experience using a range of developments in interpretation. Changes have been seen in static interpretation on-site, guides, web materials, virtual tours, educational materials, introduction of live events, handling boxes and so on. Publication schemes which are interpreting the broader aspects of the historic environment have also become available in increasing numbers, as have interpretive materials on the smaller heritage sites (the majority) which have no need or ability to support tourist visitor infrastructure but which can add significantly to a visitor's experience of a location (e.g. the 'Heritage Unlocked' series of guides produced by English Heritage (English Heritage, 2002b; 2002c)). Physical access has been improved through increasing awareness (and requirement) of the needs of disabled, less-able and elderly visitors (which comprise a significant segment of the potential tourism market). Service quality has also been addressed through comprehensive staff training schemes, and enrolment of sites into tourism industry schemes such as the Green Tourism Business Scheme (VisitScotland, 2004c). Guided tours, which were often a feature of heritage sites decades ago have come back into fashion as interpretation theory has developed, and the effects of the personal relationship made between site guide and audience has been acknowledged.

**Conclusion:** *Experiencing Heritage as Leisure-Managing Heritage as a Resource*

The exploration of changes seen across the sector has been necessarily brief and patchy in focusing on specific instances of change. The imperative has been, however, to highlight the fact that the heritage sector has changed substantially and to look at some of the driving forces behind those changes, particularly the effect of relationship development between heritage and tourism. The historic environment sector is currently a sector in flux. Heritage has found a place at the heart of culture, but still not necessarily within the ambit of cultural policy study (which still focuses on the arts and creative industries) (Dunlop et al op. cit.). Equally, heritage has become a key leisure

resource - in addressing the socio-political aims deriving from the government of the day it has not only reconfigured its resource as a niche tourism product, but has provided new ways of accessing and experiencing the past as an everyday resource within our urban built and rural environment. It is also as a social stimulus for regeneration and community development, yet heritage is still not fully linked into thinking on leisure and cultural policy. Furthermore, flux is seen in the shift from heritage to historic environment – symptomatic of change in management – yet still suspicious of management as a discipline. The sector is embracing change, but it is early days in terms of understanding such change and the driving forces and conflicts within it.

Much of the change and the tensions are behind the scenes. The experience of the past by the tourist, through visitation of heritage sites, is one of the most obvious barometers of this change however. The continuing success of heritage visitor attractions within league tables suggests that the approach taken by the sector as a whole in its relationship with the tourism sector is proving successful currently, although as visitors become more diverse and discerning the sector needs to keep apace of fast-changing demand issues. This visible change, though itself limited in scope, suggests that the concept of professionalisation is one which can be applied to the process of change, typifying the way in which the sectors are relating to each other, are effecting internal transformations, and are turning simplistic consumption of heritage products into a more complex and enriching experience of the past via the historic environment.

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# Cultural Heritage and Partnership: Public Policy and Museums and Galleries in Scotland

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**Abstract:** Across the UK, contemporary debates on the organisation and delivery of public services are replete with 'New Labour' references to the value of partnership as an essential element of governance, public policy formulation and implementation. Essentially, partnership involves co-operation between people or organisations for shared benefit, and is concerned with the added value that is alleged to accrue when a coalition of interests drawn from more than one sector is employed to organise and deliver public services. Since the election of 'New Labour' in May 1997, partnership has come to play an important part in the delivery of public policy goals across a wide range of subject areas, including mainstream areas of public service such as health care, education, transport, and housing. Since 1999, devolution has led to a decentralisation of responsibility for the delivery of services to devolved assemblies for Scotland and Wales. Nevertheless, the partnership agenda has been maintained with both the Cardiff and Edinburgh 'governments' demonstrating a continued commitment to its implementation. This article offers an early engagement with the role of partnership in relation to the sphere of cultural policy within one devolved part of the UK, namely Scotland, and considers its scope within the particular area of the museums and galleries sector. It provides an overview of the way in which the cultural policy agenda has developed in Scotland since devolution in 1999, and discusses the way in which partnership has informed the Scottish Executive's emerging policy agenda for museums and galleries.

**Keywords:** Partnership, cultural heritage, museums and galleries, public policy, Scotland.

## Introduction: New Labour and the 'Partnership' Agenda

"Partnership: 'The bringing together of representatives from different sectors/communities of interest to agree and work together towards set goals. Effective working partnerships require extensive investment of time and effort in planning, including clear details of roles, resources, and expectations. Museums regularly work in partnership with a wide range of bodies, including schools, colleges, tourist boards, other cultural agencies, and local authorities'."

*(Scottish Museums Council, 2004a)*

There is little doubt that a 'partnership' ethos has come to occupy a central role in the public policy and governance agendas of the 'New Labour' Government in Britain, with a particular emphasis placed on the development of partnerships between the public and the private sector for the purpose of enhancing the quality of public service provision (see, for example, Osborne, 2000; Akintoye et al, 2003). In many ways, this New Labour commitment to partnership is no surprise.



“It was Labour local authorities that first advocated the notion of improving public service provision through partnership and co-operation with the private sector. Moreover, Labour Leader Tony Blair is intellectually sympathetic to a move away from the heavy reliance on the state as a central feature of Labour thinking and . . . has advocated strongly the value of partnership between the public sector and private enterprise.”

*(Falconer and Ross, 1998: 133)*

Moreover, as O'Brien (1997: 32) reminds us

“The origins of partnership are to be found under the last Labour administration (1974-1979). Business and the voluntary sector were working together with state and city. Peter Shore, then environment secretary, visited the US in 1978 and saw how government intervened to regenerate depressed communities. He decided to see if such novel groupings could be stimulated in Britain, but after the 1979 election it fell to the Conservatives to take the concept forward. It was thus both accidental and enormously significant that partnership was born as a cross-party concept.”

The approach adopted toward partnership by New Labour following its election victory in 1997 was underpinned further by the revision of the Party's Constitution, promoting as it does.

“a dynamic economy, serving the public interest, in which *the enterprise of the market and the rigour of competition are joined with the forces of partnership and co-operation . . . with a thriving private sector and high quality public services*, where those undertakings essential to the common good are either owned by the public or accountable to them.”

*(Labour Party, 1995; emphasis added)*

The development of partnership as a guiding principle of 'New Labour' also derives from the Party's changing posture toward the business sector. A political party which at one time held firmly to the view that the State should play a leading role in the workings of the nation's economy now adopted a view that very little could be achieved in government without the active support of the private sector. For Labour, partnership is central to the success of public service delivery and it is through partnership activity that both the infrastructure of the public sector and the quality of public services are maintained and improved. Pollitt (2003) provides an interesting and useful overview of the various motivations that drive arguments in favour of partnership (see Table I), indicating that partnerships will be advocated for a wide range of purposes, from the desire to attract private sector funding for public services to the more general co-operative goal of sharing expertise and talent across areas of policy and service delivery.

**Table I: Motives for Partnership Formation**

<b>Attracting private finance</b>	By partnering, will be able to attract private finance, enabling them to pursue projects which could not be afforded from public budgets alone.
<b>Management reform and modernisation</b>	By working in partnership, public managers will learn how to run programmes more efficiently and effectively.
<b>Public legitimacy</b>	Participation in a partnership is seen as a good in itself – symbolic of a pooling of talents in the pursuit of worthy public purposes.
<b>Risk shifting</b>	In public-private partnerships, private partners assume part or all of the risk associated with projects.
<b>Downsizing the public sector</b>	Like contracting-out and privatisation, partnership may be seen by those who favour downsizing the public sector as a way to get tasks which were formerly performed by public sector staff handed over to the staff of commercial or voluntary organisations.
<b>Power sharing</b>	Partnerships may be seen a promoting more 'horizontal', less authoritarian and hierarchical relationships.

Source: Pollitt (2003: 58)

An examination of Labour's public policy rhetoric illustrates clearly the way in which the language of partnership has permeated across the wide spectrum of government: at the national, devolved and local level; between the public, private and voluntary sectors; and, between service providers, communities and citizens (see for example Fairclough, 2000; IPPR, 2001; Pollitt, 2003; Stoker, 2004; Ludlam and Smith, 2004). As an important element of New Labour's *Modernising Government* agenda (Cabinet Office, 1999), partnership involves 'a fundamental shift of thinking, putting behind us the ideology and dogma of the past. In the modern world, governments are judged not on what they own, or on how much they spend, but on whether they deliver' (HM Treasury, 2000: 5). For Labour, modernisation rests largely on the credo 'what matters is what works', and the partnership agenda offers a highly pragmatic approach to the provision of public services through the best use of what public, private and voluntary sectors have to offer. In this regard, an interesting question arises concerning the extent to which, and in what form, partnership has informed debates on cultural heritage policy within the devolved polity of the UK? In an early attempt to engage with his question, the article now turns to Scotland (that part of the devolved UK with, arguably, the strongest 'self-government' arrangements) and to the specific subject of cultural heritage policy and museums and galleries.

### **The Cultural Policy Agenda in Scotland**

With the creation of the Scottish Parliament and a devolved system of government came the hope that the area of culture and heritage would be able to be developed quickly and more easily than had previously been the case. However, at the time of devolution, cultural policy was not high on the agenda of Scotland's political parties, compared to other areas of public policy. It seemed

that an opportunity would perhaps be missed ‘to give a high and exciting profile to an area of policy which can only gain in importance with the coming of Scottish self-rule’ (McMillan, 1999: 13).

Prior to the creation of the Scottish Parliament, the Scottish Arts Council and the Convention of Scottish Local Authorities (COSLA) had in 1998 jointly produced a document entitled, *Creative Scotland: The Case for a National Cultural Strategy*, which called for the development of an explicit cultural strategy for Scotland. Following the elections to the Scottish Parliament in June 1999, which resulted in a Labour-led coalition administration, work commenced on a national cultural strategy, culminating in the publication, in August 2000, of *Creating Our Future . . . Minding Our Past: Scotland’s National Cultural Strategy* (Scottish Executive, 2000). In this document, a definition of ‘culture’ is adopted in accordance with that agreed by the United Nations Educational, Scientific and Cultural Organisation (UNESCO),

“In its widest sense, culture may now be said to be the whole complex of distinctive spiritual, material, intellectual and emotional features that characterise a society or group. It includes not only the arts and letters, but also modes of life, the fundamental rights of the human beings, value systems, traditions and beliefs.”

(*Scottish Parliament Information Centre, 2001: 1*)

As established, Scotland’s National Cultural Strategy was formed around four principal strategic objectives, as set out in Table II.

**Table II: Scotland’s National Cultural Strategy: Strategic Objectives and Key Priorities**

Strategic Objective	Key Priorities
1. Promote creativity, the arts and other cultural activity.	<ul style="list-style-type: none"> <li>• Facilitate a climate supportive to those working in the cultural sector</li> <li>• Enhance Scotland’s creative industries</li> <li>• Celebrate excellence in the arts and other cultural activity</li> </ul>
2. Celebrating Scotland’s cultural heritage in its full diversity	<ul style="list-style-type: none"> <li>• Promote Scotland’s languages as cultural expressions and means to access Scotland’s culture</li> <li>• Conserve, present and promote interest in, and knowledge of, Scotland’s history and culture</li> <li>• Promote international cultural exchange and dialogue</li> </ul>
3. Realising culture’s potential contribution to education, promoting inclusion and enhancing people’s quality of life	<ul style="list-style-type: none"> <li>• Promote and enhance lifelong learning in and through arts, culture and heritage</li> <li>• Develop wider opportunities for cultural access</li> <li>• Maximise the social benefits of culture</li> </ul>
4. Assuring an effective national support framework for culture	<ul style="list-style-type: none"> <li>• Develop a modern national framework of support for cultural provision</li> <li>• Improve the quality and management of cultural provision</li> <li>• Target funding to achieve clear priorities</li> </ul>

Source: Scottish Parliament Information Centre (2001: 2-3)

In regard to the delivery of this programme, the Scottish Executive announced its intention to 'work with a wide range of partners to implement the actions identified in the strategy' (Scottish Executive, 2000: 64), though the focus was less on the development of public-private partnership or the explicit question of generating private finance. Rather, the priority was more on the potential for closer co-operation between the various institutional stakeholders involved in the cultural policy domain: the Scottish Executive and Scottish Parliament; local authorities; the Scottish Arts Council; Scottish Screen; Historic Scotland; the Royal Commission on the Ancient and Historical Monuments of Scotland; the National Trust for Scotland; the Scottish Museums Council; the National Museums of Scotland; the National Library of Scotland; the National Galleries of Scotland; and, those companies with national roles - Scottish Opera, Scottish Ballet, the Royal Scottish National Orchestra and the Scottish Chamber Orchestra (see, for more detail on these various organisations, Scottish Parliament Information Centre, 2001).

With specific reference to the museums and galleries sector, the strategy paved the way for a national audit of Scotland's museums and galleries. In this respect, reaction to the National Cultural Strategy was generally supportive. For example, the Scottish Museums Council expressed its delight that the document,

"recognises . . . that there is a lack of strategic direction across the museum sector as a whole. The Government support for the national audit of museums and gallery collections . . . which will identify what is of national and local importance . . . is a great step forward for Scotland."

*(Scottish Museums Council, 2000)*

The national audit (Scottish Museums Council, 2002) represented the first-ever national survey of Scotland's cultural heritage as located within its museums and galleries, and was promoted as 'a first step towards a coherent national funding and policy framework for museums in a devolved Scotland' (Scottish Museums Council, 2002: 2).

According to the National Audit, there are over 400 museums and galleries in Scotland, including: the National Museums of Scotland (NMS) and the National Galleries of Scotland (NGS); museums and galleries operating under the auspices of local authorities; independent museums and galleries; university museums; and, regimental museums. The national museums and galleries, and the local authority museums receive the majority of their funding from a single identified source, with the Scottish Executive providing around 76 per cent of the funding for the NMS and NMG, and local government accounting for some 83 per cent of income for museums under their purview. The independent museums have a pattern of funding that does not rely on a single dominant source of income, though the single most important source of funding

is from admission charges which account for around 21 per cent of total income. Other sources of income include financial support from trusts, local government grants and various commercial and trading ventures. University and regimental museums receive a high percentage of their income from a single source. Military museums attribute over 40 per cent of their funding to private sources, while university museums receive 84 per cent of their income from grant-awarding bodies such as the Scottish Higher Education Funding Council (Scottish Museums Council, 2002: 5; Scottish Executive, 2003a: 2).

The National Audit was merely the first stage, albeit an important one, in the development of public policy toward the museums and cultural heritage sector in Scotland. While making no formal recommendations, it did offer guidance on what were perceived to be key issues for development. In so doing, it identified that any policy formulated for the sector would have to recognise the role and contribution that would come through enhanced partnership activity.

### **Partnership and Museums and Galleries in Scotland**

In August 2003, the Scottish Executive published the results of a major consultation exercise conducted in the wake of the National Audit of cultural heritage. This document, *An Action Framework for Museums – Consultation and Response* (Scottish Executive, 2003), provided the Executive's response, delivered within the context of the Partnership for a Better Scotland (PABS) agreement of 15 May 2003, the Labour-Liberal Democratic governing coalition's programme for government. This agreement set out the Scottish Executive's commitments for the next four years of Scotland's governance and gave commitments to emphasise the importance of cultural heritage. Among the key issues addressed in this action plan was the promoting of partnership through a range of initiatives:

- A formalisation of the outreach role of the national museums and galleries, through which they would adopt a greater role in support of the non-national sector, providing advice, expertise and other assistance;
- The creation of a regional development network in order to enhance the capacity and sustainability of the cultural heritage sector through partnership;
- The establishment of regional centres of excellence;
- The creation of partnerships between all heritage and enterprise agencies.

In advancing this agenda, the Scottish Executive stated its intention to work with 'key partners' to (Scottish Executive, 2003a: 1)

"identify existing and planned research to articulate the enriching role heritage plays in the lives of Scottish people, the value they place on it, and to find

reliable measures for the most significant cultural, economic and social impacts of museums.”

In emphasising the partnership ethos, it was noted that museums and galleries have a wider role to play in various policy agendas, such as education, social justice and social inclusion, economic policy and links between museums and the tourism sector. In this regard, one particular element of the action plan for museums is worthy of further examination - namely - the proposed role of regional development networks. The establishment of a regional development framework was viewed by the Scottish Executive as essential to the formation of critical social and economic partnerships and was geared toward the development of the cultural heritage sector through.

“active partnerships: across local authority boundaries; between local authority and independent museums; enabling a new level of productive interaction with the Nationals and providing opportunities for museums to link into, and be part of, other initiatives within developing regional partnerships. In particular:

- A network of regional museum development officers with some strategic funding will be created. These officers will work across local authority boundaries, at an appropriately senior level to ensure effectiveness and influence, developing capacity and skills through regional public / voluntary / private sector partnerships.
- They will take on a general role of developing the local presence of museums – as educational and cultural facilities and as visitor attractions.
- They will help local museums to plug into the processes of community planning. They will be points for the development of funding proposals and education.
- Through their connections to each other and to central support from the Scottish Museums Council and the Nationals they will promote benchmarks for quality and ensure access to relevant expertise.
- In developing the capacity of regional ‘clusters’ they will enable the improved interface between the Nationals and non-nationals.”

*(Scottish Executive, 2003a: 8)*

The value of these regional networks had long been recognised by the museums and galleries community. For example, the Scottish Museums Council had been advocating the establishment of such arrangements for local museums for some years and had, in 1998, stated that support for museums should be focused on regional groupings which should be designed,

“to cross local authority boundaries, creating opportunities for formal and informal benchmarking . . . There should also be support for specialist networks,

including staff of NMS and NGS whose expertise should be viewed as a national resource and funded accordingly.”

*(Scottish Museums Council, 1998: 7)*

The Scottish Executive proposed financial support for this framework in the form of a ‘Regional Development Challenge Fund’, formally launched on 22 December 2003. As announced, the fund was aimed at encouraging,

“the development of partnerships at regional level, cross local authorities, between museums of all types and other agencies . . . (It) will facilitate the development of ‘regional clusters’ and infrastructure which will . . . encourage the building of cross-sector partnership working in areas of learning, tourism, community planning and workforce development.”

*(Scottish Executive, 2003b)*

As established, the Fund was made available from April 2004 and is administered on the Scottish Executive’s behalf by the Scottish Museums Council. In providing this support, the Executive envisaged the creation of around six to ten partnerships across Scotland which will be expected to include, as lead partners, either an independent or local authority museum. As envisaged, these networks would be able to use funds in order to promote the development of regional cultural tourism, regional partnerships between museums and non-museums organisations, cross-regional initiatives and the enhancement of the educational capabilities of museums. The importance accorded to the ‘partnership ethos’ is clear from a reading of the four main themes identified as comprising the strategic focus of the fund,

- “Learning – development of partnerships between museums and the formal and informal learning sector, resulting in improved resources and services for learning through museums.
- Access – development of partnerships between museums and other agencies or community planning partnerships, which increase access to museums for excluded groups.
- Tourism – development of partnerships between museums and other agencies to promote regional tourism initiatives.
- Workforce development – regional initiatives, aimed at developing the museums’ workforce, paid and volunteer, for example through training and skills development.”

*(Scottish Museums Council, 2003: 2)*

### **Museums, Partnership and the Future of Cultural Heritage Policy in Scotland**

Toward the end of 2003, the Scottish Executive commented that significant progress had been made in relation to cultural policy development, and insisted that a 'strong and vibrant cultural identity for Scotland' was being promoted by its strategy (Scottish Executive, 2003c: 1). Around the same time the First Minister (Jack McConnell MSP) used his St Andrew's day speech to present his vision of a new direction for cultural policy in Scotland. With a theme of 'cultural rights', the First Minister stated that (Scottish Executive, 2003d: 1),

"Culture cuts across every aspect of government . . . each member of the Scottish cabinet will use the power of cultural activity to help them in their work – culture will not be an add on, it will be at the core of everything we do . . . I want to see imaginative and new proposals coming forward from all ministers . . . The planning system can be a powerful tool to encourage creativity in our open spaces and the built environment. Our health team will look at the range of ways the arts have been used around the world as therapy and see how we might apply them here in Scotland. One of the biggest barriers to people attending cultural events is transport – changing that is a challenge for the transport team as much as it is for the cultural sector . . . Scotland's local authorities have long recognised many of the benefits of cultural investment, but we will ask them to examine how they can take that even further."

In 2004, the First Minister announced the launch of a further review of cultural policy through the establishment of a Cultural Commission, headed by James Boyle, former chairman of the Scottish Arts Council, and comprising eight other members<sup>1</sup>. As established, the remit of the Commission covered the full canvas of cultural policy, including museums, galleries and heritage. The full remit of the Commission is summarised in Table III. Commencing its work in June 2004, the Commission produced an interim report in October 2004 (Boyle, 2004), with a final report due in June 2005.

In regard to the relationship between museums, the review of cultural policy and partnership, there is a clear vision among the museum sector that partnership will continue to play an increasingly important role. For example, responding to the Cultural Commission's Interim Report, the Scottish Museums Council advocates,

"a dynamic structure (for the museums sector) that will see the national and non-national museums working together in an innovative partnership. This vision is underpinned by a desire to see museums and galleries play an increasingly important role in Scotland's cultural life and for the sector to become an international model of best practice."

*(Scottish Museums Council, 2004b: 1)*

The Scottish Museums Council proposes the establishment of a Scottish Museums Partnership, supported by a museum strategy agency to create a structured approach to the development of the museums sector that,



## Cultural Heritage and Partnership: Public Policy and Museums and Galleries in Scotland

**Table III: The Remit of Scotland's Cultural Commission**

Area	Remit
General	<ul style="list-style-type: none"> <li>• Explore the notion of cultural rights for the Scottish citizen, and those of its creative community and define how these might be translated into a scheme of entitlements</li> <li>• Redefine the institutional infrastructure and governance of the Scottish cultural sector to enable it to deliver the entitlements that spring from rights</li> </ul>
Cultural Rights	<ul style="list-style-type: none"> <li>• Define a set of cultural rights that will have application across Scotland</li> <li>• Consider the issue of entitlements and how these might be delivered</li> </ul>
Wider Objectives	<ul style="list-style-type: none"> <li>• Provide guidance and advice on initiatives which affect the wider objectives of Scottish government</li> <li>• Provide specific guidance on how cultural bodies should relate to other Scottish Executive policy areas. in particular education, enterprise, sport, tourism, major events</li> <li>• Provide specific guidance on the responsibilities of other public sector agencies and local authorities</li> <li>• Comment on guidance for the private and voluntary sectors in this regard</li> <li>• Assess the merits, and potential, of cultural planning in this regard</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>• Assess the current institutional infrastructure in terms of being fit for purpose, impact on sector, cost effectiveness and best value, relationships with other institutions, relationships between sectors (i.e. public, private, voluntary)</li> <li>• Consider the designation 'National' and how it might be more appropriately determined</li> <li>• Give special consideration to the national companies and how their potential might be realised more effectively</li> <li>• Comment on the role and potential of the cultural sector's international presence</li> <li>• Consider the role of new and emerging technologies and the IT infrastructure on the sector and the potential for engagement</li> <li>• Assess the need for, and nature of, a cultural 'think tank'</li> <li>• Assess the adequacy of the current built infrastructure of the cultural sector</li> <li>• Suggest more effective alternatives for the institutional infrastructure in light of the above</li> </ul>

Source: Scottish Executive (2004: 1-4)

“would be capable of delivering a measurably enhance museums service across Scotland in as little as five years’ time. The Partnership would provide the means by which Scotland could be placed at the forefront of museum organisation and deliver internationally, by working as a sustainable network that shares collections, resources and expertise.”

*(Scottish Museums Council, 2004: 1)*

Indeed, in its submission to the first phase of consultation on the Cultural Commission, the Scottish Museums and Galleries Working Group emphasise the important role envisaged for the widespread use of partnership in the development of the sector,

“Like the wider cultural sector, museums are no strangers to partnership. At their best, partnerships share best practice, develop skills and enable win-win collaborations. Most deliver at least some of their services through a variety of partnerships, both within the museums community and cross-domain. These range from partnerships between non-national museums and NGS and NMS for loans, research, fieldwork and conservation; international collaborations involving university museums and NGS and NMS; partnerships with libraries and archives for exhibitions and learning resources; projects with regional Social Inclusion Partnerships for delivery of community based learning programmes; partnerships with agencies such as Scottish Arts Council for arts based projects; relationships with the private sector for sponsorship and other support.”

*(Scottish Museums and Galleries Working Group, 2004: 5-6)<sup>2</sup>*

For the Working Group, the critical issue now facing the future of the museums sector is the need to develop a broad strategic policy framework within which partnerships, and the proposed Scottish Museums Partnership in particular, will have a central role to play (see Scottish Museums and Galleries Working Group, 2004: 8-10).

## **Conclusions**

The evolution of public policy toward museums and galleries in Scotland clearly demonstrates the increasing prominence accorded to the role of partnership activity. Through the development of Scotland’s national cultural strategies and the response of the museums sector to these developments, partnership arrangements are increasingly viewed as a positive way forward in the drive for a more efficient and effective museums and galleries policy agenda. Although the use of partnership as a driving force in public policy has, to date, been more prevalent across other public policy areas (such as health and education) it seems clear that as the Cultural Commission continues its work in Scotland, the cultural heritage sector too will increasingly move forward in the coming

years within the organisational context of more partnership and network-oriented working.

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<sup>1</sup> The members of the Cultural Commission are: James Boyle (Head), former chairman of the Scottish Arts Council; Craig Armstrong, composer; Ian Ritchie, a Director of the Edinburgh International Film Festival; Lucy Mason, Chief Executive of Dance Base; Shonaig Macpherson, President of Edinburgh Chamber of Commerce and Enterprise; Gordon Jeyes, Director of Children's Services at Stirling Council; George Black, Chief Executive of Glasgow City Council; Brian Lang, Principal and Vice-Chancellor of St Andrews University; and, Colin Marr, Director of Eden Court Theatre (Miller & Duncan, 2004).

<sup>2</sup> The Scottish Museums and Galleries Working Group comprises the NMS, NGS, Association of Independent Museums, Group for Scottish Local Authority Museums, University Museums in Scotland, Glasgow Museums and the Scottish Museums Council.



## Edinburgh's Hogmanay in the Society of the Spectacle

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**Abstract:** This paper is based upon a continuous study of the cultural event entitled 'Edinburgh's Hogmanay' as it has operated since 1996 and, specifically, of the gated and televised late evening spectacle immediately leading up to the turn of each New Year held in and around Princes Street, Edinburgh's main street. The paper is based upon a series of interviews held with current and former members of the planning group for the event, an examination of media coverage between 1996 and 2003, the consideration of other documentary sources such as committee minutes and marketing literature and, finally, personal observations from attendance at the events themselves.

**Keywords:** Cultural heritage, festivity, authenticity, visitor experience, media coverage.

### Background<sup>1</sup>

The Scottish festival of 'Hogmanay' (31 December of any given year) is variously defined as "the last day of the year" or "New Year's Eve" and derives from the Gaelic 'oghe maidne' meaning 'New Morning' ([www.dewarswow.com](http://www.dewarswow.com)). No doubt, these descriptions accurately define the precise location in time of the festivity but it could be argued that they do little to present the cultural significance of Hogmanay in the construction of Scottish identity, the representation and transmission of 'scottishness' globally, the reproduction of cultural values taking place or the expectations and memories that the term evokes for those who count themselves among Scots. Although all cultures have mechanisms and means of recognising, recording and celebrating the transitions from one calendar year to the next, some aspects of the Scottish celebration of Hogmanay within the 'westernised' calendar appear to have resonated world-wide in the Twentieth Century. Particular elements of the Scottish experience of Hogmanay that have travelled well include: the tradition of travelling 'home' – within or back to Scotland – to participate in the celebration among friends and family; the importance of visiting family, friends and neighbours as a 'first foot' (the tradition of crossing the thresholds of others' homes for the first time early in the new calendar year – in practice, often the small hours of the morning of New Year's Day, 1 January – bearing symbolic gifts such as coal or shortbread, [www.onlinedictionary.com](http://www.onlinedictionary.com)); the corollary of warmly welcoming individuals (including strangers) into the home at this time; and, the cultural significance of alcohol (especially Scotch whisky in the 'orthodox' observation of the festivity) during and in all of these exchanges and transactions. Principal among the traditions of Hogmanay is the spirit and (sometimes) performance of 'Auld

Lang Syne', a song codified by the Scottish 'bard', Robert Burns (egalitarian ploughman poet and collector of traditional 'ballads' in the late Eighteenth Century). This song hectors its participants and audience alike with the exhortation that "auld acquaintance" should "be forgot, and never brought to mind" – put simply, that prior acts and deeds committed upon us should be forgiven, and that the metaphorical slate is wiped clean – a recurrent theme in the spirit of Hogmanay as 'renewal' and 'regeneration' of self and community.

Another recurring motif of Hogmanay is the negotiation and reconciliation of both private and public celebration within the envelope of the festivity itself. Private incarnations of Hogmanay are well recorded in the pages of Scottish popular culture icons such as the DC Thomson organisation's respectable urban working class family rooted in the 1930s, 'the Broons' (offered as a comic strip weekly in the Scotland's largest selling Sunday newspaper, *The Sunday Post*). The Broons are also available anthologised, usually published in time to reach the Christmas gift market. This version of the privatised Hogmanay typically involves the women of the Broon household furiously conducting family chores of cleaning and washing during the daylight hours of Hogmanay and, often, cooking delicacies for the impending arrival of (well-behaved) revellers at the midnight hour. The men are unlikely to be involved in such activity and are more likely to be represented as the well behaved visitors and beneficiaries of this symbolic cleansing and preparation of the 'feast'. First foots always arrive with what are purported to be the traditional and acceptable gift of a lump of coal and are greeted with a black bun – a rich fruit cake. Alcohol is seldom, if ever, on the agenda (mirroring the general conservatism of the editorial policies of the organisation) but it is common for a visitor to have brought some form of entertainment for the collective enjoyment of the household, e.g. a piano accordion. This romanticised portrayal of Scottish urban tenement life in which those living together within one block of flats or street (Glebe Street in this case) celebrate their collectivism and communitarian well-being in a situation where women are domestic workers, no-one is intoxicated and behaviour is self-regulated, ordered and respectable seems increasingly incredible in the face of actual lived experiences in working-class communities. Please see Figure I for an example from Glasgow's *'Evening Times'* of the image of first-footing in times past.



Figure I: *TIMESPAST* -  
First-footing, Glasgow, 1954  
(Source:  
<http://www.eveningtimes.co.uk/lo/features/7010950.html>)

As far as public celebration is concerned, there is also a history of group participation at well-established gathering points which are usually

taken to be symbolic foci for their communities as well as vantage points for the collective consumption of the moment when a public time-piece announces (by bell or chime) the arrival of the new calendar year. Outside Scotland, Trafalgar Square in London and Times Square in New York are examples of such sites that have evolved a 'tradition' of people celebrating the occasion, together with varying results in terms of public safety and public order. Within Scotland, gathering places were usually in town or city centres, where crowding was possible (and easily policed, of course) due to the nature of the site and where the time could be (more or less) accurately and objectively counted and marked. In Edinburgh, the place taken by generations as this symbolic heart of the city was the Tron Kirk, a historically resonant Church of Scotland building midway between Edinburgh Castle and the Palace of Holyroodhouse in the (so-called) Royal Mile – all of which were the centre for tourism in Edinburgh throughout the mid to late Twentieth Century. These public gatherings have often been sites of anxiety for those concerned to regulate and monitor behaviour (e.g. the decision to 'discourage' any gatherings at Trafalgar Square after the 9/11 attacks upon the USA, ostensibly because of fears of terrorism). Some of the main concerns included: moral welfare in the face of the carnivalesque (e.g. 'over' indulgence in alcohol, drugs, sex and fighting in public); corporeal welfare at a time of year (in the United Kingdom) when night-time temperatures regularly fall below zero Celsius – this an even greater concern when taken alongside some of the moral concerns cited above; administrative risk aversion, particularly of liabilities for crushing and impact injuries or deaths in the climate of public policing post-Heysel and Hillsborough Stadium disasters; and, finally, the possibility of damage to public and private property as these other factors (and responses to them) interact to produce what could be interpreted as 'volatile' situations.

### **Public Safety, Public Order and 'Edinburgh's Hogmanay'**

Close to the end of the Twentieth Century, the annual gatherings at the Tron Kirk in the City of Edinburgh had become fairly well-attended, especially by local young people, exhibiting most of the causes for concern among authorities with public responsibilities as cited above. The gatherings could not themselves be labelled as 'events' as they remained unorganised by any administrative authority, uncommunicated to any potential participants and largely contingent in their unfolding at the occasions themselves. Nevertheless attendances at the Tron Kirk rose steadily from an early 1950s low (in an era of austerity and rationing) and attendance policing policies became progressively more visible and officer numbers more numerous. It seems that Hogmanay at the Tron Kirk had become an 'unofficial' celebration by some citizens, demonstrating elements of what some historical commentators label as 'rough' behaviour when discussing popular recreations and pastimes of the Nineteenth Century (e.g. Malcolmson, 1982). Equally, policing in the face of the anxieties of city



government resulted in the inevitability of arrests and the recording of injuries and other casualties of the occasion via its ancillary elements. Perhaps the persistence of the occasion of Hogmanay for those who chose to celebrate out with their homes and their immediate communities is best illustrated by the growth of participant numbers (in police estimates) throughout the late Twentieth Century, despite only a sporadically functioning clock at the Kirk!

By the mid-1990s, it was beyond question that, in the United Kingdom at least, the local constabulary (Lothian and Borders Police) had considerable experience in the handling of large scale events, perhaps second only to the Metropolitan force in London. Mainly this arose because of the necessity of handling arrangements for the annual arrival of the Monarch (nominally on holiday) at the Palace of Holyroodhouse and of other activities associated with this visit. Various annual events connected to the Edinburgh International Festival and the Festival Fringe also contributed to this experience base. However, the event which most respondents assert galvanised the impetus for change to the Hogmanay celebrations was the European Community Leaders' Summit held in Edinburgh in late 1992. This event had considerable impact upon Edinburgh for a range of reasons, some apparently contingent. Firstly, the experiences of the police force in responding to high-profile situations requiring sensitivity, security and (cheerful) public compliance grew considerably as a result. Secondly, tourist authorities and city government alike appear to have reflected upon Edinburgh's winter product and its aesthetic, economic and cultural aspects. Equally, these bodies began to consider trends in out-of-season visitation to cities and recognised that British cities were being overtaken by recently available mass market competitors such as Prague. That much of Edinburgh's emergent service economy, like the rest of Scotland, was effectively closed for business (hotel and guest house bedrooms, retail and café outlets) from late December to early January - a time commonly taken to be a traditional holiday for all in Scotland - was easily established. In the development of a range of related, local, small-scale festivities of an appropriate scope for winter and of 'recognisable tone' for European media consumption, it was also intended to assure the ownership of the Summit by the citizens of Edinburgh, ameliorate its inevitable disruption to their daily lives and give meaningful connection between Edinburgh and Europe. Within these initiatives lay an apparent realisation that, with a change in attitudes, practices and venues, a business opportunity for Edinburgh could emerge. Nearly all of the agencies involved in the evolution of the 'Edinburgh's Hogmanay'.

In research interviews, respondents make it clear that at the outset, the vision for a Hogmanay celebration on 31 December would be the culmination of almost a week of activities and visitor opportunity to participate and spend (all of which would be badged under the banner of 'Edinburgh's Hogmanay', thereby extending the economic impact to almost all of the post-Christmas to

Once inside the cordon (there are five entry points and seven exit points) participants have free access around the Princes Street and adjoining areas with a range of film and live events available. Principal among these events are: the 'World Stage', offering contemporary, live 'world music' acts; the 'Celtic Stage' presenting live acts of music and dance grounded in a Celtic tradition and the (chargeable) 'Concert in the Gardens' which has regularly featured both contemporary pop music and a revival of an act formerly famous. In 2002/3 this amounted to Mercury Music Prize winner Ms Dynamite and Culture Club respectively. The sounds of all of these events carry well across the city centre – beyond the confines of each outdoor venue. These events are accompanied by a fireworks display after the turn of the year – an element replicated (for 2002/3) across the seven hills upon which the city is built, thus effectively reaching any viewer anywhere in the city as far as its outermost suburbs.

Once the New Year has arrived, the managers of the event are keen to ensure that it winds down quickly and that the streets are cleared, so live acts cease soon after 00.30 and little or nothing (except public transport out of the city centre) is offered after 01.00.

### **Consuming Edinburgh's Hogmanay Street Party - Constructing Identity for the Occasion**

On the streets themselves, the behaviour is usually described as 'revelry' in media coverage. This media coverage is a key to understanding some aspects of the success of the Street Party. From the mid 1970s, television coverage of the moments of one year becoming another in the Scottish 'tradition' was an increasingly thorny problem for Scotland's televised media organisations. Faced with viewers at home who were aware of what constitutes authenticity within the occasion, they struggled to offer programmes that reproduced its actuality or even its spirit. Programmes were pre-recorded in a 'White Heather Club' (a variety show providing sanitised elements of a ceilidh, a bothy evening and the Music Hall for the early television mass market of the 1960s) studio-type of format, some time in late November. These programmes showed rather sheepish and embarrassed studio 'guests' nursing a couple of small drinks at what was purporting to be a Hogmanay party while a few minor (usually, but not only, Scottish) celebrities went through the motions of performing some songs connected to the occasion and some professional dancers gave exhibitions of Scottish country dancing, with occasional opportunities for everyone to take to the dance floor for a sedate waltz accompanied by a small band live in the studio. Some of these broadcasts were shared with networks in England. Some companies experimented with actual live outside broadcasts on Hogmanay itself, but found that the cost of hiring staff and recognising that many customers chose to stay within the opportunities for things to become

'unplanned' where alcohol was involved were considerable and probable. Successful replication of the Hogmanay experience for Scottish and other audiences had been a difficult goal to achieve

Thus, the revelry on the streets that Edinburgh's Hogmanay Street Party offered was a welcome opportunity for the company that could secure access to coverage. Not only was there something 'real' and 'worth seeing' to cover using outside broadcast cameras, there was also an opportunity to syndicate pictures to a far wider audience, where a spectacular event was occurring and when news media were usually 'quiet' (thereby offsetting some of the costs of production). Programmes could be constructed for the home market around the event, based in venues close to the city centre and be able to use both anchor staff and live acts in these makeshift studios while also benefiting from coverage of the audience and acts on the streets themselves. Here was an opportunity to get coverage of the 'true' Hogmanay - authentic voices from the street, albeit monitored and sanitised - together with coverage that would keep viewers tuned-in, rather than have them reaching for alternatives (Wessblad, 2003). It offered a chance to 'be somewhere' where something was actually happening, rather than an artificially constructed set or false situation. Equally, it offered those with both a stake in Edinburgh's Hogmanay and in Edinburgh as a year-round venue to present the city in particular ways and to reach markets that would cost millions of pounds to penetrate in other ways (Green, 2002). Having a rather (perhaps unjustified) stuffy reputation as a destination for an older audience of cultural 'elitists', Edinburgh needed to demonstrate its cosmopolitan youthful credentials as a vibrant European capital that was spectacular to see and fun to be in. Media coverage of the Edinburgh Hogmanay event, culminating in the Street Party, could both deliver this message and reach these markets - whether live or in recorded format during early January (Evans, 2003). Thus, enabling media coverage of all types and from a wide range of local and international sources became a crucial part of the organisation of Edinburgh's Hogmanay. Often, media coverage is presented as necessary for securing local 'ownership' of spectacular events - and this was an important issue, given the level of tax-payer support - but this seems to have been secondary to a desire for developing public relations and marketing opportunities and for image and identity construction (de Bres and Davis, 1998).

As for the streets themselves, there is a relatively patient resignation to the security elements of entering the Street Party cordon. These include a checking of tickets, with few people presenting themselves ticketless and demanding entry. In practice, the culture of ticket acquisition or the expedient of getting inside the cordon prior to it being secured has become fairly well-established among the young locals. Visitors will tend to secure tickets via their accommodation or have heeded the warnings about the need to get into the

centre before 22.00. Most young visitors are carrying alcohol, many in glass containers which are not now permitted, and have this decanted into large trumpet-like plastic containers proved free by the sponsors of the event (Royal Bank of Scotland). Once inside the cordon, in theory, spectators may move around freely. In practice some areas, particularly junctions, become very crowded with people attempting to move in contradictory directions, thereby causing 'tailbacks' of pedestrian traffic in a number of directions. This restricts practical possibilities of movement, despite police attempts to secure channels in each direction. There is a general air of bonhomie, perhaps rather 'forced' in places, with three obvious segments to the spectators. Firstly, local youths, both male and female, who are taking advantage of a free (at point of use) popular culture event in their home city and who are often in large groups. They are often visibly intoxicated. Secondly, young people who have travelled for the occasion whether they are culturally Scottish or not (again both sexes, usually in smaller groups, sometimes staying in the city for one night only and with the desire to be 'part of' the event). Such young visitors, who are less likely to seem drunk, give a young, cosmopolitan 'aura' to the event. There seem to be many antipodeans, some from the USA and Canada and English-speakers from mainland Europe. Lastly, there are 'mature' visitors who have come 'for the experience' and may have stayed for more of the near week-long events. Usually in couples or with teenage family, these visitors are more likely to be staying in hotels or guest houses. These visitors are less likely to show signs of inebriation.

With all of the above visitors becoming part of the media spectacle, outdoor television coverage has tended to concentrate upon the high-profile acts performing (briefly) upon the stages and on demonstrating the international dimension to the festivity by interviewing visitors from outwith Scotland (Watson, 2003). It also seeks to ensure spectacular backdrops to any filming – hence the fireworks, the lit Edinburgh Castle and camera sweep of the 'pressure points' of crowded corners and near-stage fandom. All of this serves to deliver a media spectacle that provides an image of heritage (both built and cultural), youth, excitement, zeitgeist (in some of the acts chosen), of irony (in some of the acts chosen) and not taking itself too seriously, global accessibility as well as 'liberal' attitudes to 'high-spirits' on the streets – a tolerant, vibrant and expressive public culture (Green, 2002; Evans, 2003).

### **Regulating Edinburgh's Hogmanay Street Party – Sanitising Spectacle**

Policing responsibility for the Street Party falls to the Lothian and Borders Constabulary. As previously mentioned, this force has considerable experience as a result of handling the visits of monarchs, handling foreign dignitaries and the opening of the Scottish Parliament in recent years. The force also manages

crowds at the annual fireworks event towards the end of the Edinburgh International Festival in the summer – in policing terms, an annual dress rehearsal for officers covering the Hogmanay event.

Policing such events is often taken to be a reconciliation of aspects of public order and public safety (Hughes, 1999). However, all of the officers interviewed in this research stressed the primacy of their public safety role. On the one hand, this is not surprising. By reputation, even if it is not admitted openly, the large crowd at the 1996/1997 event fuelled by the appearance of the band Ocean Colour Scene – relatively unknown when booked but having broken into the mainstream of popular culture at the time of the Street Party – caused considerable congestion (the term ‘crushing’ is never used except when objective measures of it can be provided) in the parts of Princes Street connected to Hanover Street. This gave serious cause for concern and led directly to the imposition of a ticketing and numerical control at future events. Taken together with the ‘history’ of injury when citizens gathered at the Tron Kirk, media speculation upon terrorist attacks aimed at the event (especially in 2002/3) and the potential impact upon those directly and indirectly affected by a hypothetical fatality, the focus upon safety is not surprising. Temperatures are usually below zero after dark at this time of year, the city centre environment is not designed for large crowds and everything from street furniture to fencing can become injurious in crowded circumstances. On the other hand, the necessity for public order is not incommensurate with public safety – clearly disorder has potential to lead to a compromise of safety (Ravenscroft and Matteucci, 2003). Moreover, it seems politically expedient, at the very least, to ensure that behaviour that would not be tolerated on a ‘normal’ Saturday evening, is handled consistently at this flagship event. Yet, arrests are few and can be counted on one hand.

A number of reasons can be proposed for the relatively low number of arrests. Firstly, any arrests will lead to officers having to relinquish street duties so that they can charge the alleged offenders. Clearly, a ‘zero tolerance’ approach could eliminate any visible police presence fairly quickly. Police refute any suggestion that they do not handle this occasion like any other, but some participants seem to be able to undertake some activities (e.g. cannabis smoking) that might not be tolerated at other times. Secondly, marksmen and women are used as ‘spotters’ on the roofs of buildings, ostensibly to warn the officer in charge of any crowd pressure points but they are also able to anticipate and indicate any difficult situations. More importantly, everyone interviewed asserted that the behaviour of those in the crowd was very different from that which could be expected on any similar occasion equally fuelled by cultural identity and alcohol (e.g. the aftermath of a football match between Edinburgh’s rival teams, Heart of Midlothian and Hibernian) or almost any Saturday night. This was described by one respondent as a ‘tartan army effect’ – the said ‘tartan

army' being the general term used to describe football supporters who travel to see the Scottish national team (as well as the specific – and some would say, gentrified – official travel club of the Scottish Football Association designed to enable supporters to follow the team to matches away from home). The tartan army has acquired a reputation that is distinctly ambassadorial – as well-behaved, law-abiding but always 'up for a good time' representatives of the Scottish nation, not only when dealing with supporters of other nations and when abroad, but also as hosts to others visiting Scotland – functioning almost as cultural *attachés*. Undoubtedly, there is a good deal of alcohol involved in the practices of the tartan army, but this does not seem to have become associated with negative behaviour, as it has done in other cultural contexts – e.g. what government refers to as 'binge-drinking' and associated behaviours. The hostility sometimes associated with confrontations between the supporters of some national teams does not seem to apply to the 'tartan army'.

This effect can be seen as a form of self-regulation. It is not to suggest that Scottish participants are somehow the same people as the tartan army, but that the technologies of the self involved in regulating behaviours are applying at the public celebration of Hogmanay in Edinburgh. Many of the local participants felt a need to explain that they had a responsibility to ensure that 'guests' enjoyed themselves – some obviously cherishing the possibility that such assistance could lead to a romantic encounter – and that they understood the significance of the occasion in Scotland. This self-regulation appears to function strongly at cultural occasions such as Edinburgh's Hogmanay, and is a key factor in securing 'acceptable' media coverage (Waterman, 1998). *Vox pop* coverage becomes possible and fairly reliable, lending an air of authenticity to the proceedings as a reporter interviews participants. Camera sweeps are unlikely to detect or select 'inappropriate' behaviour, leading to programmes that are fairly safe for family viewing while seeming to be 'of the street'. Equally, this form of social control contributes greatly to securing public order in the aggregate, even if there may be 'small' transgressions in the specifics of some situations (Ravenscroft and Matteucci, 2003). Where public order is subsumed within the envelope of public safety, self-regulation enables a 'hands-off' attitude to be adopted with confidence, while concerns about crushing or impact injuries (rather than, say, rioting) remain the priority of the authorities. Crucially, this event lasts for only some three hours – perhaps the key to maintaining order at the event. Those involved may be able to be contained within their personal and collective spirit of ambassadorial identities for that length of time, before returning to 'real' street behaviour in the less rarefied, less crowded, uncordoned world of the 'normal' city street.

## Conclusions

Edinburgh's Hogmanay Street Party has transformed the celebration of the festivity in that city, from an element of 'rough' but naturalistic crowd behaviour

to a sanitised version of the event, planned, mediated and socially engineered to become a spectacle in which the spectators are also participants and, thus a key part of the event itself (Waterman, 1998). Like a televised football match played in an empty stadium, there is the effect of viewing an empty city as the bells ring and the fireworks ignite is not likely to garner many viewers. The sight of city streets filled with well-behaved revellers integrated across international divides and clearly enjoying a 'good-time' portrays the global city image that Edinburgh wishes to have. Not only is this the equivalent of countless marketing and public relations expenditure that would be politically difficult to sustain in the public sector but also it provides a site for hedonistic pleasure once a year for the citizens – and their compliance is vital to the continued success of the occasion. Moreover, the event confidently asserts Edinburgh as the home of the Hogmanay festival which is now global in its penetration and observance, and brands it alongside other global cities regularly featured on British television at this time – Sydney, Beijing, Moscow, Paris and New York. It appears to steal a march on London, still wrestling with forms of behaviour and policing that Edinburgh has left behind by adding the element of tourist visitation (whether apparent or real or both) to the social mix of the crowd and, thus, developed the expectations of diplomatic behaviour for both the cameras and for the guests. No longer is Hogmanay a local celebration encompassing forms of sexism, racism and 'rough' practices and pastimes. It has been sanitised and re-packaged for a new era where market expectations demand consumer friendliness, service sector economy values, 24/7 availability and smiling faces for transmission across the globe (Atkinson and Laurier, 1998).

The effect of this transition upon Edinburgh in particular, and Hogmanay in general, is for investigation elsewhere. It appears to democratise elements of the Hogmanay experience that were resolutely populist in their formation. However, it surely has a more hidden effect upon the homes of the citizens who have chosen not to come on to the streets for their celebrations (Hughes, 1999; Beckett, 2003).

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### *About the author*

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## Edinburgh's Hogmanay in the Society of the Spectacle

**Dr McPherson** is a Senior Lecturer in the Division of Media, Culture and Leisure Management at Glasgow Caledonian University and her main research interests lie in the area of cultural policy. Her doctoral thesis utilised Steven Lukes' theories of power to examine the leadership and management of a local authority museum service. Other work has focused on leisure and health policy and she has also edited a book on leisure and social inclusion. She has published in the area of museum management and, most recently, has conducted research in the area of festivals and events as tools of public policy.

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<sup>1</sup> Please see the URLs listed in the references to this paper for further background information on Hogmanay.

## Visiting the Past: Creating the Visitor Experience at Open-Air Museums

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**Abstract:** Open-air museums have long been part of the cultural scene and for over a century have been one of the many different experiences available for tourists. Created around a tangible landscape of heritage, open-air museums offer their visitors a chance to 'step back' in time and experience 'the past' in an interactive and accessible manner. Open-air museums are complex social spaces that operate as a significant medium to portray 'the past' but which remain imperfectly understood. This omission, it is suggested, has a direct impact upon our ability to understand and evaluate the visitor experience offered at such places. Research undertaken to date has failed to offer a coherent, flexible and replicable means of analysis. This paper advocates a new, overarching methodology - the *heritagescape* - as a way to begin to understand the specific qualities of open-air museums and how they work within the broader context of heritage sites. At the same time, this method will enable researchers to gain a better understanding of the visitor experience as it relates to the landscape of heritage on offer at open-air museums and other heritage sites.

**Keywords:** Open-air museum, visitor experience, heritage sites, heritagescape, landscape.

### Introduction

*"Then, you step back in time through the portal of living history . . . The history depicted here is more than that something you'll observe and hear. You'll touch it. Smell it. Even try your hand at some of it . . . You may have a sense you were actually there."*

Jamestown-Yorktown Foundation (April 2001)

At one point in their travels most people will have visited an open-air museum or living history site. These places, which come in a number of different shapes and sizes, are found throughout the world. Open-air museums are unique social spaces that portray the past by using a combination of old structures, the spaces in between - gardens, fields, streets and paths - and sometimes even people in strange dress engaged in unfamiliar activities to create a place of 'the past'. Here, rather than viewing 'the past' at a distance (as at 'traditional' museums) visitors to open-air museums and other living history sites are offered the opportunity to interact with the past, to walk into another time and to hear, touch and smell 'the past'.

Open-air museums and living history sites have long been part of the cultural scene and, for over a century, have been one of the many different experiences on offer to tourists. They provide their visitors with a vivid and interactive encounter with 'the past' and since 1891 when the Swedish museum, Skansen, opened its doors as the world's first open-air museum, visitors have been drawn

to these places. Although open-air museums go by a variety of names (including folk museum, living history museum, eco museum)<sup>1</sup> they all share the characteristic of “utilising a combination of buildings, objects and open space to communicate their message to the public” (Matelic, 1988: 79). The ‘message’ for open-air museums is portraying ‘the past’. The focus of this paper will be to investigate how open-air museums communicate that message to visitors and, in doing so, how they create a sense of place and offer visitors an experience of ‘the past’ that is engaging and appears credible.

## Open-Air Museums

Before turning to these critical questions it is important to look first at some of the characteristics of open-air museums. Next, in order to understand how they ‘work’ in their larger context of heritage sites and to begin to understand how they operate as distinct social spaces, it is essential to review some of the research that has already taken place.

Open-air museums offer one of the most common, accessible and tangible manifestations of the larger group ‘heritage’. Found all over the world, they come in any number of different forms, portray a vast array of pasts and cover a wide variety of time periods. Open-air museums - along with a number of other places - have as their primary mandate, a brief to portray ‘the past’. Like heritage sites in general, open-air museums tend to be widely acknowledged as places where individuals can identify with the past and locate themselves in it (Ashworth, 1998; Devine-Wright and Lyons, 1997: 33; Piccini, 1999; Teather and Chow, 2003; Walsh, 1992: 103). Furthermore, the material components of these sites are accepted to be key mechanisms in the creation and development of personal narratives (including identity) that may arise out of such places (e.g. Handler and Gable, 1996; Lowenthal, 1985, 1998; Uzzell, 1998: 22). The buildings, the streets and paths, the properties and even individual objects or artefacts offer a tangible hook on which individuals may hang their own stories of history, identity and membership in the larger group past. What is particularly remarkable about open-air museums is that even when the past that is being portrayed is unfamiliar visitors nonetheless appear to be able to consistently engage - physically and emotionally - with these sites.

As a form of heritage site, open-air museums are distinguished by their use of combination of buildings, objects and properties to (re)create a landscape of the past. While some open-air museums have been constructed in-situ and on their original site (e.g. Colonial Williamsburg in the United States), many more have emerged out of a set of buildings that have been removed from their original location(s) to a new and unrelated site. This means that from the outset open-air museums must create a sense of place. A sense of place is a key ingredient in producing a space that appears natural and distinct yet is also integrated with its surroundings - visitors to the site must be able to recognise

that they are somewhere else. For open-air museums this sense of place is complicated by the fact that they must also successfully achieve a sense of the site as a place of 'the past'.

For visitors the allure of open-air museums may be found in a number of factors. First, the past that is on offer at an open-air museum has a particular quality that often allows an individual a closer relationship or greater familiarity with a past which may, in turn, offer an opportunity for visitors to buy into a national heritage. Alternately, the draw may lie in that as a learning experience, open-air museums offer an experience that is less tedious than that found at 'traditional', display-based museums. In sharp contrast to these latter places, open-air museums are almost entirely experiential places where the past not only appears close at hand but it is often presented in a friendly and accessible style. There is an innate appeal to these sites.

Like other tourist sites and attractions, open-air museums are dependant on visitors, thus, these sites must develop strategies for marketing the site to the public by offering a valuable, enticing and enjoyable experience (Yale, 1998: 3). In the instance of open-air museums people are, for a variety of reasons, seeking out an experience of 'the past'. Open-air museums, as we have seen above, do however have another job and that is to create a distinct place apart, a place 'of the past', that will allow visitors to 'step back' and to engage with a place and a time that is significantly different to that in which they live. In essence, open-air museums must both create and maintain an illusion of 'the past'. What this means in practical terms is that along with the amenities and in addition to the health and safety measures that all sites must provide for their visitors, open-air museums must undertake to supply these same features within the context of a 'past' landscape. As we shall see, out of these circumstances particular issues arise.

### **Open-air Museums as Heritage Sites**

Heritage sites are complicated and complex entities. Besides open-air museums they come in a variety of different forms: from roadside stop to stately home and from open-air museum to ancient monument, the variation amongst heritage sites is enormous. As yet, despite considerable effort, researchers have failed to come to agreement on just what a heritage site may, or may not, be and how these unique social spaces 'work'.

Over the past twenty years that heritage has been studied as a formal discipline (e.g. Fowler, 1992; Hewison, 1987) heritage sites and open-air museums have come under considerable scrutiny. Despite this there has been a failure to develop a replicable and flexible means of analysing heritage sites. At first glance this may appear a long way away from our consideration of the visitor experience at open-air museums. However, this author suggests this is because

we have not yet fully grasped what it is that characterises heritage sites. We have an imperfect sense of how these places 'work' as unique social spaces and as a medium for conveying experiences of 'the past', thus we are unable to comprehend fully the impact and interaction of visitors with the site. Further, this lack of an articulated and standardised methodology has seriously impeded our ability to understand how heritage sites are recognised and perceived. Both of these are key elements in comprehending, and indeed providing for, the visitor experience.

Extending this another step, this failure (to develop a methodology) has also resulted in an inability to distinguish between different sorts of encounters with the past. Not only are we unable to determine this between *different* types of site (i.e. open-air museums and theme parks), nor are we able to distinguish between different experiences at the *same* sort of site. As result we neither have the means nor the vocabulary to mark the differences between individual places. Given the enormous variation among open-air museums this is a critical omission.

There are two other trends which have emerged out of the way that heritage (as a cultural phenomenon and as discipline) has been approached. Both of these trends have had considerable impact on the way that open-air museums have been viewed and investigated previously. The first of these centres on the issue of knowledge exchange.

Over time, within the discipline of heritage studies several splits have developed. One of the most prominent is a divide between the practitioners (e.g. site managers or policy makers) and the academy. The former tends to be almost exclusively located in practical applications whilst the latter tends to locate itself in analyses of the processes underlying heritage as a social construct. Unfortunately, because the transfer of knowledge between these two groups is not always efficient or sustained this means that there is a tendency for work to fall into the category of *either* management/policy *or* theory. Academy and practitioner have not been fully integrated.

In the end this means that because, in general, management decisions, whether daily or long-term, do not seem to be linked to the theoretical developments and because the knowledge gained in one part of the sector does not feed into the other parts, two things occur. First, management decisions - while thoughtful - are not always linked to underlying and universal processes. In some cases this may mean that the predictive qualities of those decisions could be impeded. Second, the lack of regular, consistent and coherent transfer of knowledge may lead to the syndrome of 'reinventing the wheel'. Instead of developing an overarching methodology that offers a coherent, consistent and transparent means of investigating open-air museums and other heritage sites,

the trend has been for many researchers to resort to using different language and methods for each new site (or sites) that they analyse.

### **How to Identify the Visitor Experience**

What has become clear over the course of the preceding discussion is that open-air museums and heritage sites both tend to be intuitively recognised but poorly comprehended. Without this critical understanding and without developing an overarching and replicable method to investigate these places, any future investigations will be hampered and will no doubt fall into the same patterns as the previous analyses. Without a common language and a common methodology we will be unable to move research forward.

Clearly the lack of a comprehensive understanding of open-air museums and other heritage sites lies in the way of moving research forward. It is suggested here that the best way of circumventing this is to consider the sites as landscapes. This has the benefit of providing a methodology that can take into account their unique role as socially constructed and highly experiential places. Thus, a new method of analysis, the *heritagescape* (Garden, 2004) provides a coherent means by which sites may be evaluated. The *heritagescape* is predicated first on the understanding that all heritage sites are made up of a landscape and second, that there are universal processes which may be found at these sites. Critically, the *heritagescape* is made up of a set of 'guiding principles' that allow features at an individual site to be assessed against a constant rather than against each other. Instead of imposing a set of criteria, the individual personality of a particular site is allowed to emerge and we are able to begin to discern those universal features that make heritage sites 'work'.

In practical terms this means that sites will be evaluated on their material components (e.g. buildings, signs, objects, etc.) that will be assessed against the guiding principles. Concentrating our efforts on the 'furniture' that makes up a site means that our attention is drawn to the individual components. This means that not only are the underlying processes (notably change) that accompany a site over time highlighted, we are also able to start to the identifying the elements that work together to create a place of 'the past'. Ultimately, this will allow us to gain a better understanding of how visitors experience, perceive and react to a site as it changes and develops.

There are a couple of critical points about the *heritagescape* and the guiding principles that need to be elaborated before continuing. The *heritagescape* is a very specific form of landscape that relates wholly to heritage sites. It defines a particular space that is distinct from but, at the same time, related to the larger landscape (environment) in which it is located. In turn, the guiding principles are the means by which the *heritagescape* may be identified and analysed. Each of the guiding principles has a specific role within the analysis

and is based upon ideas of *boundaries*, *cohesion* and *visibility*. It is critical to the understanding of the heritagescape to recognise that not only must all three of the guiding principles always be present, it is also the interplay of the three of them together that will create the heritagescape and will, in turn, determine the way the heritagescape is manifested at different sites. It is this aspect that relates directly to the quality and the nature of a particular encounter with the past. It is the resonance of the heritagescape that contributes to the final appearance and operation of the site and it is this quality that is directly related to the overall visitor experience.

The following pages will analyse the visitor experience that is offered at four open-air museums, within the specific context of the three questions asked in the introduction: (1) how do open air museums communicate the past to their visitors? and, in doing so; (2) how do they create a sense of place and of 'the past'? allowing them to; (3) offer an experience of the past that is engaging and credible. The author will use the concept of the heritagescape to explore how these places manage to present an engaging and credible past (or pasts) and, at the same time, satisfy visitor needs, accommodate health and safety provisions and incorporate other modern elements into the tangible landscape of heritage that is on offer at these sites. All of this will be wrapped in larger ideas of place and the way that open-air museums 'work' as distinct, social spaces. Along the way we will begin to respond to Bella Dicks, as she ponders the idea of a 'historical place-identity' and asks "What place do they [the visitors] imagine they have visited as they passed back out through the turnstiles?" (2000: 195).

### **Case Studies: England, Denmark, USA and Sweden**

Turning now to the case studies, we can now directly apply this idea of the heritagescape in order to begin to answer some of the questions that are critical to this paper. The process begins with visits to sites. The physical components of the site: the fences that define the edge of the space, the gates and buildings that provide the means to enter the site; and, the signs and maps that direct us through the site are just some of the ordinary and omnipresent features that come under scrutiny. Applying these individual elements against each of the guiding principles means that we will begin to understand how the landscape of the site is made up and how it works to create both an experience of 'the past' and to exist as a place apart that engages visitors.

The first site, *Beamish, the North of England Open-Air Museum*, is located in the North-East of England near Durham. Opened in 1970 this site has consistently attracted high numbers of visitors - including many repeats - and has garnered a number of visitor and sector awards (e.g. Best UK Attraction for Group Visits 2002) and is an English Tourism Council 'Quality Assured' Visitor Attraction. Yet Beamish has also come under considerable scrutiny. Figuring in both Robert Hewison's 'Heritage Industry' (1987) and later in Shanks and Tilley's treatment

of various means of portraying the past in their 1992 book 'Reconstructing Archaeology' this site has come under criticism for soft-focus nostalgia and for removing this past from the larger historical context.

Beamish is made up of four thematic areas: the Town; the Colliery Village (with Drift Mine); Home Farm and Pockerley Manor; and, the Waggon Way. Each of these areas offers a slightly different encounter with the past. Most of the interpretative areas offer a strong sense of being 'in' the past and among these the Colliery Village is particularly resonant. Here, the stage-setting devices are strong. The gardens with their ramshackle sheds, the dusty road and the pithead building all contribute to the experience of this area. As well, the view outwards to a wooded area helps to define this area as a distinct space. Yet, the village is not free of modern intrusions. There is ample evidence of security systems and other modern devices. Many of the pit cottages are blocked off to visitors and the drift mine must provide all of its visitors with red plastic hardhats. The 'Town' with only a very few exceptions, *overall* is able to sustain a sense of the past which is remarkably intense in the outside spaces along the High Street. Post boxes, a 'To Let' sign and window dressing all contribute to the illusion.

This vivid sense of the past is not as strong in the two remaining areas. Pockerley Manor and Home Farm are also, in varying degrees, quite resonant spaces but in both instances the farmyards and outside areas are empty and, in the case of Pockerley Manor, weed-filled. This feeling of abandonment or inactivity stands in high contrast to the actively interpreted interiors. Home Farm in particular suffers because it is separated from the rest of the site by a road and is located on the side of the site that has a weaker interpretative focus. The fact that it is itself made up of a combination of modern barns and pens and historic structures - some of which house the tearoom and toilets - gives the Home Farm area a very 'mixed' feel. It is not surprising that the site identifies this area as one of its most poorly visited spaces (Woolley, 2003).

Another problem at Beamish, as at so many very large sites, is that the space between the areas is vast and it is hard to maintain the experience and the sense of the site. In terms of the guiding principles, it is clear that each of them is quite strong and together the three operate at roughly the same sort of level/strength. Beamish tends, on the whole, to be both a distinct space and, at the same time, well-integrated into its larger surroundings. The problem is that there are areas (the Town and the Colliery Village) within the larger site which seem almost to be sites within a site and it is little wonder that museum staff identify these two places as the most visited of all the areas at Beamish. It could be argued that these areas seem to have their own individual heritagescapes that often threaten to overwhelm that of Beamish as a whole.



*Den Gamle By*, located in Århus, Denmark, is composed of buildings of different ages and from a variety of places which are sent around a pond. The job of creating a place 'apart' and of 'the past' is particularly difficult as *Den Gamle By* is located within an urban environment at a busy city intersection. Nonetheless, this site has managed to create a very strong sense of being 'elsewhere' within a larger landscape. As the museum considers that "the streets are rooms too" (Kjær, 2001) the outside spaces become much more than the means to move from one place to another. As one moves through the site one can see and recognise the layout of town squares, city streets and even miniature neighbourhoods, all of which work together to create cohesion. Critically, at *Den Gamle By* one tends to remain within the past. The guiding principles are all very strong at *Den Gamle By* and one has a very strong sense of the experience of being in the past and, as such, the site as an entity is recognised.

All of the above would seem to suggest that the landscape of *Den Gamle By* is very 'clean' with few modern intrusions. In fact, this site has chosen to mark each of the buildings with blue and white signs which offer, in three languages, the name of the structure and its original location and function. Furthermore, some buildings have an extra brass sign marking a corporate sponsor. While neither of these signs is large, they are quite visible. However, these elements, whilst visible and present on the landscape, do not dominate. The author suggests that this is because the site as a cohesive unit and, as a place, creates a strong heritagescape meaning that the experience of the past and of the place are enough to carry over and include these modern elements.

*Den Gamle By* also offers a chance to examine the role of change and the impact that this process may have upon a site and the individuals who interact with it. Beginning in 1998 the Mintmaster's Residence, a very large and imposing structure, was added into the central Town Square area. This necessitated the removal of a significant portion of the hillside (which formed one of the boundaries of the site) as well as the relocation of two other buildings. As this is a familiar landscape to *Den Gamle By*'s many visitors, it would be logical to assume that an intrusion like this into the centre of the site and into one of their central interpretative areas would have quite serious ramifications. Critically, it appears that this was accomplished without taking away from the essential identity of the site, the boundaries changed but the site did not. Both visibility and the marked, physical boundaries were altered, yet the site seems to have remained a cohesive entity and this new element has been assimilated into the landscape of the past at *Den Gamle By*. Because *Den Gamle By*, as a site, is able both to achieve a strong sense of place and to be fully integrated into its larger environment, change has been subsumed by the strong identity of the site. Here, each of the three guiding principles is very robust and the site has a strong and vibrant heritagescape offering an experience of the past that is vivid and sustained.

The heritagescape at *Henry Ford's Greenfield Village* in Dearborn, Michigan appears quite different to the above two sites. Made up of a variety of structures (original and recreated) the site celebrates American Invention and is an homage to Ford's idol, Thomas Edison (inventor of the light bulb). Most of the buildings at Greenfield Village come with a pedigree. All in one place visitors can see Thomas Edison's workshop, the bicycle shop owned by the Wright brothers before their historic Kitty Hawk flight and a seventeenth-century Cotswold cottage. Around all of this runs a boundary, which in the area of the site closest to the entrance and most apparent to visitors, is marked by a very visible, very solid red brick wall.

Using the guiding principles to identify the visitor experience at this site allows us to see almost immediately that cohesion has a much-reduced role. The spaces between the buildings are just that - spaces - there are few street signs or other stage setting devices that create a sense of the past. The signage does nothing to improve this situation. There is a huge variety of signs and the only 'standard' one is a green sign found in front of the buildings that offers the name, date, original location and sometimes a brief social history of the structure. These signs tend to feel like giant labels on display cases. Because the cohesion is so weak it is difficult to identify (visibly or otherwise) what is or is not the site. As a result, when one regularly glimpses the Ford plants situated beyond the limits of the site the apparently strong, physical boundaries tend to fade and the site as a discrete entity tends to blur. The lack of cohesion may also have arisen out of the emphasis on the individual building rather than the site as a whole. While it is a hallmark of this institution it may also be that it is a strong factor standing in the way of an experience of 'the past'. This also means that Greenfield Village becomes more of a 'museum of buildings' and less of a place. What one sees at Greenfield Village is that all three of the guiding principles are quite weak which, in turn, means that the site does not stand strongly as either a place apart or of the past and, in the end, the experience is much more display-oriented. Finally, because the site is so firmly set as a sort of a tableau it appears that it would be virtually impossible to accommodate any kind of sustained change seen at a site (like Den Gamle By) and that would not impact the overall identity of the site.

As the final site example we will turn to the world's oldest and perhaps best-known open-air museum: *Skansen*. Located on the Djurgården, an island in the Stockholm archipelago, this site has long been used as both a template and exemplar and, over time, it has become a sort of shorthand for all open-air museums. It might, therefore, reasonably be expected that Skansen would have a strong heritagescape. Locating itself within its environment, Skansen incorporates the immediate topography and vegetation into the site and has created a natural-looking environment. In several places, including the entrance

building, the site appears to deliberately draw the view outwards to modern skyline of Stockholm.

Inside Skansen there are very 'strong' areas where an encounter with the past is particularly vivid. Yet on the whole, partly because of the size of the site and partly because of the variety of different roles that Skansen as a place performs, the site does not hold together very well. The spaces between the interpretative areas are not always well thought out and often visitors lose track of 'the past', despite the fact that in the farmsteads and around some of the interpretative areas there is considerable stage setting. As a result of its great size the visual clues need to be strong and in many cases not only are they weak, they are absent. Furthermore, several of the areas at Skansen have been given over to modern functions so that as a visitor one is constantly moving in and out of the past. One minute the site appears like a public park, the next like a fair and the next like something of 'the past'. Simply put, Skansen fulfils too many different roles to be a cohesive and defined place of the past. Although Skansen occupies a strong role in the hearts and minds of Swedes and acts a cultural and folk icon (Wikander, 2003), in fact, on the ground it melts into its surroundings and takes on the appearance of just one more among the many attractions on the Djurgården.

## Conclusions

An important theme of this paper was to explore how the visitor experience was created at open-air museums. Along the way, it became apparent that without a better sense of open-air museums as places and without taking into account their unique qualities as highly experiential places that convey a message of 'the past', our understanding of these museums will remain static. The key to getting at the heart of the visitor experience was provided by the use of a new methodology - the heritagescape - that allowed a consistent and coherent means of analysis and that enabled us to view each site individually. Previously, the trend towards locating analyses outside the site meant that not only were the underlying processes and some of the more subtle changes being obscured, there was also a tendency for these sites to acquire a veneer of 'sameness' and to appear as largely homogeneous entities (Prentice, 1991).

The remit to portray the past means that open-air museums must achieve a balance between creating a convincing landscape of heritage and, at the same time, accommodate the many modern devices that will guarantee the safety of visitors and will ensure that their needs will be satisfied. The case studies demonstrated that open-air museums achieve this in different ways and with varying degrees of success. Den Gamle By was an example of a site that managed to carve out a distinct space of the past despite being located in the heart of a city. The new method of analysis revealed that this site managed to knit together the inside and outside spaces into a larger whole. This meant that visitors had

an unbroken sense of 'the past'. On the other hand, Greenfield Village offered a look at an open-air museum that created a very different type of visitor experience. Here, the museum focused on the interior spaces that were much stronger than the generic and modern spaces outside. This, along with a mixed approach to the interiors and a lack of standardised signage, means that visitors are constantly walking in and out of the past. All this worked together to make Greenfield Village less a place of 'the past' and more a 'museum of buildings'.

What is important about this new means of analysis and about the new data that has emerged - giving us a broader and more complex view of the visitor experience at open-air museums - is that it is *not* a judgement on the quality or 'credibility' of a specific interaction with the past. This is one of the most important aspects of this investigation. Previously, researchers attempting to evaluate the visitor experiences at open-air museums have framed their investigations in terms of 'good/bad' or 'real/not real'. One of the most damaging consequences of this approach is that it has tended to polarise the view of the visitor experience. This also tended to obscure the underlying elements that actually contribute to the nature of the encounter with 'the past' that visitors will experience. Instead, considering the mechanics of the experience i.e. the 'how', allows us to explore the visitor experience in much greater depth. By looking at the means by which open-air museums manage to create a distinct place of the past not only can we assess these places on a site-by-site basis and compare one to another, we now also have the means to determine why within one particular place some areas of a site 'work' better and are more compelling to visitors than others.

This is a critical advance both for open-air museums and for heritage sites in general. As has been seen in the course of this paper, a comprehensive understanding of the open-air museum as a unique social space is tied directly to the visitor experience at that place. However, the lack of a consistent and coherent methodology meant that researchers were unable to move forward from the innate understandings that were driving research. Critically, this meant that for investigators trying to differentiate between the many kinds of sites that portrayed the past there were few alternatives but to rely on sets of fixed criteria (e.g. Stone and Planel, 1999: xix). Given that these standards are often shared by a number of very diverse places it was difficult, if not impossible, to differentiate between them. At its simplest, this meant that we were unable to distinguish between an open-air museum and a theme park - despite the fact that often not only is the purpose of these places usually quite dissimilar - they also provide significantly different experience of 'the past'.

Looking at open-air museums from a new perspective and with a new approach has allowed us to begin to comprehend the many different ways that these complex places convey the message of the past to the public. A strength of this new method also lies in its ability to offer a means to bridge the gap between

the academy and heritage practitioners. The heritagescape provides us with a means of analysis that is flexible, replicable and transparent and, in doing so, it gives us the words with which to describe these places. Our understanding of open-air museums and particularly of the experience of the past that they offer can only benefit from this.

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Dr Mary-Cate Garden is a Lecturer in Heritage Studies. She trained as an archaeologist and has spent many years working in museums, with government and with private heritage agencies in Canada and in the United States. Her recent research has examined open-air museums and living history sites.

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<sup>1</sup> For the sake of clarity, the term 'open-air museum' will be used throughout this paper. It should be read in the broadest sense and taken, in this context, to include the many similar sites that portray the past.



# 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
<b>Museum/Art Gallery</b>	<b>190</b>
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
<b>Total</b>	<b>651</b>

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**

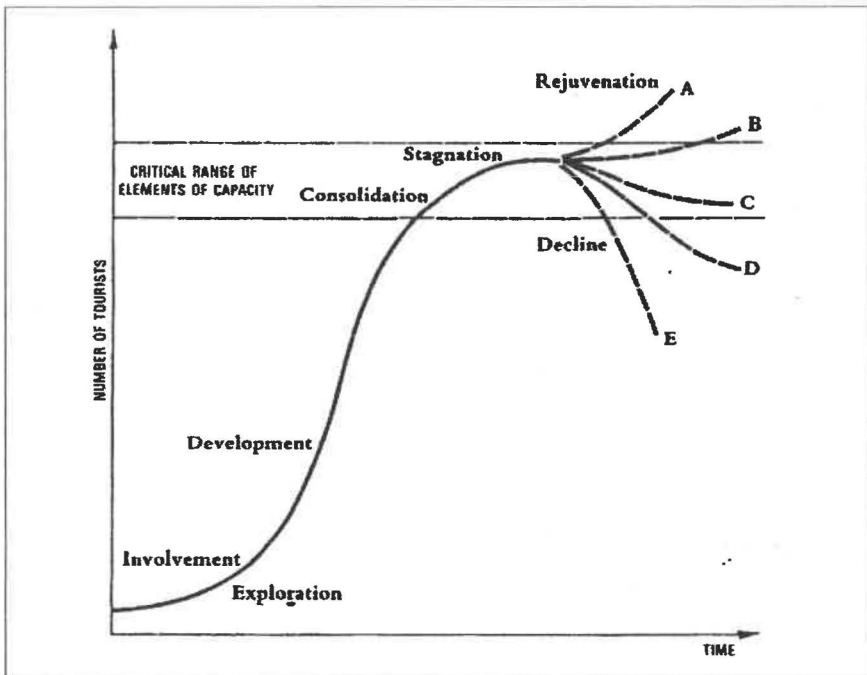
Butler (1980) constructed the vision that the developmental processes emerging within tourism systems evolved and was susceptible to change over time. He argued that tourist attractions are finite non-renewable resources. This argument can be applied to the preservation and maintenance of natural and 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

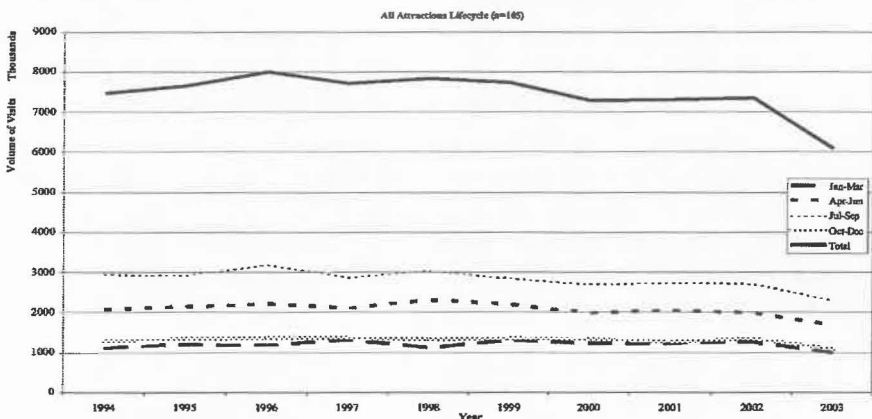
performance. They included major museum developments, particularly in celebration of the Millennium, the foot and mouth disease epidemic of 2001<sup>1</sup> and the threat of terrorism. These market drivers help explain lifecycle curves and seasonal variations in visits highlighted in the next section.

### 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

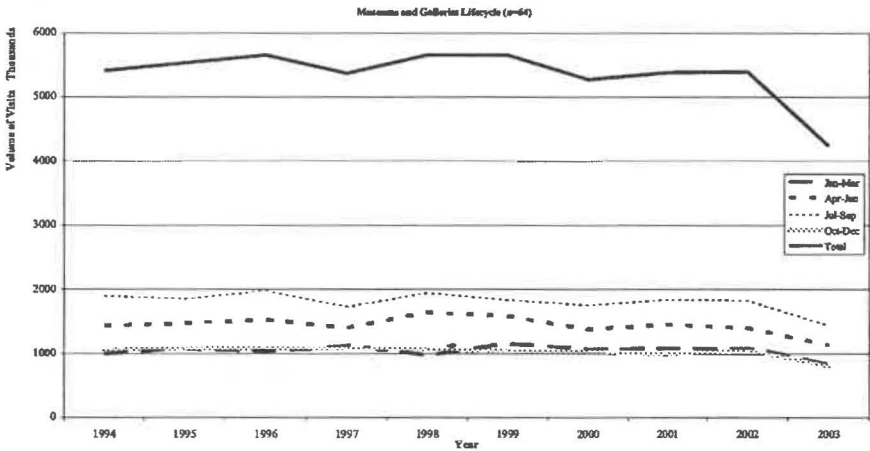
**Figure II: All Attractions: Lifecycle Curve 1994-2003**



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**

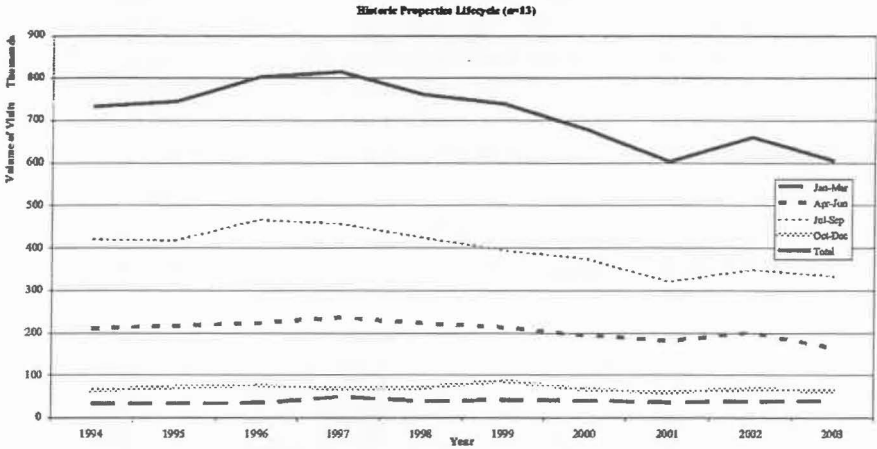


Due to the prominence of the museum sector in terms of number of organisations and high visitor flows the museum lifecycle would be expected to shape the curve for all attractions. However, decline appears more prominent for museums in 1997 with rejuvenation clearly evident in 1998 mirroring levels achieved 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

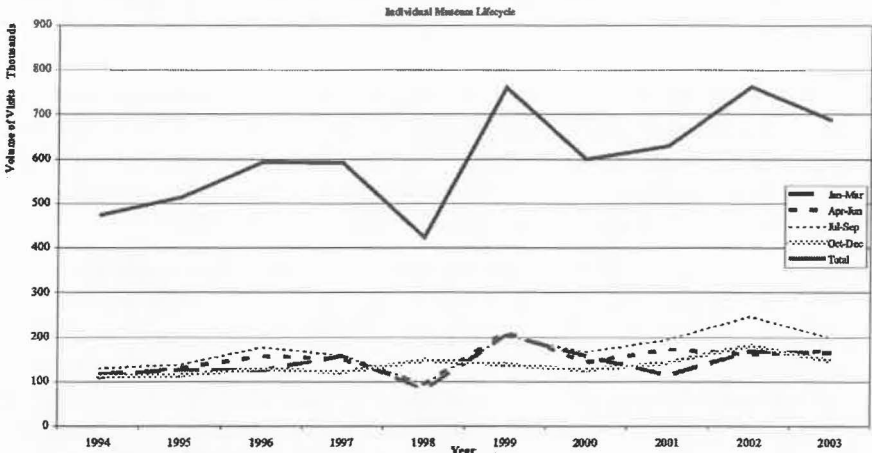


Figure V, the ten-year lifecycle curve shows annual visits consolidate at around the £600,000 mark. However, it is quite striking how visitor volume declines sharply in 1998 followed by a sharp spurt in growth during the following year.

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

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.

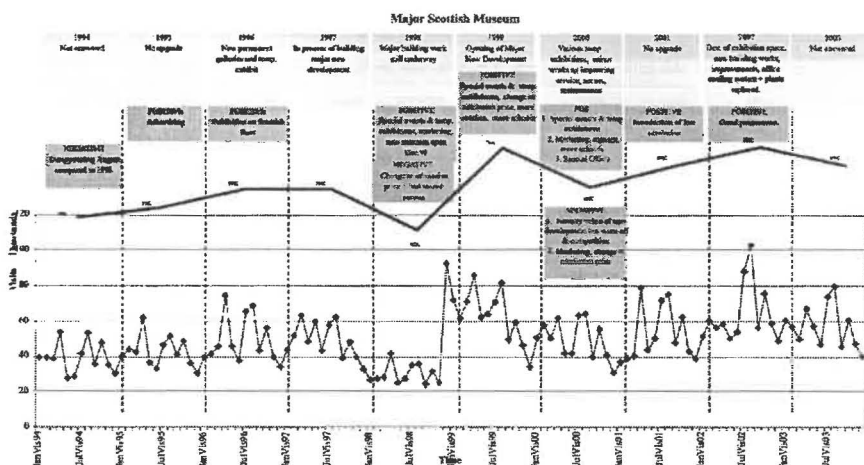
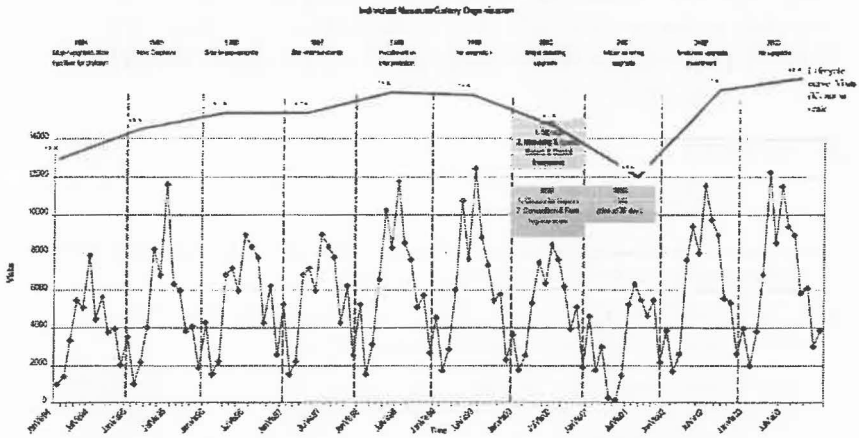


Figure VI confirms Lennon's (2002) argument that investment in marketing and innovation stimulate growth and increase popularity. However, it also shows the radical impact on visitor volume of major new development from building to opening it to the public. Changes in admission charges in 1998 and 2000 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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<sup>1</sup> Foot and mouth disease is a highly contagious infection spread among cloven-hooved animals.





# The Heritage of Festivities

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**Abstract:** As host communities seek to enhance and diversify their attractions base through the creation and development of festivities, there is a need for a conceptual underpinning to the nature and character of these events. This paper offers a theoretical overview of the heritage of festivities by tracing their chronological development, from the medieval to the modern day. Bakhtin's classic theorisation of festivity within traditional and medieval society, which is the precursor to their modern equivalent, is subject to critical examination. With reference to modern events, Rojek's thesis of Modernity 1 and 2 is drawn upon. In addition, key stages in the changing shape of modern festivities are identified and attention is paid to the changing face of tourism demand and the meaning of the tourism commodification process. Finally, the implications of tourism and festivity-based empirical research are noted. It is proposed that tourism processes reflect broader social changes within society and the consumption of festivities offers insights into identity creation, thereby contributing to an understanding of the arena of tourist lifestyles.

**Keywords:** Festivity, tourism, medieval, modern.

## Introduction

Festivities are often interpreted as an integral part of the human existence given their relationship to 'play' dimensions of life. These festivities can assume various guises in their production and representation of cultural and geographical contexts. Immersing oneself, however ephemerally, in festivities can offer a sense of release from everyday existence. The individual may be released from social mores and hierarchical boundaries (Bakhtin, 1968). Sociability and participation can form the backbone to the festival experience and the way the individual participates offers insights into the inner structures and workings of a society (Gilmore, 1998). Festivities may encapsulate the identity of a place and its people and a people's participation in an event, therefore, has the potential to affirm or reject the identities conveyed. However, entrepreneurial pressures can threaten the authenticity of such emblematic moments of identity and, in this context, the tourism commodification process brings to light tensions regarding the culture and enterprise relationship.

Although there is a body of literature exploring not only the relationship between tourism and festivity, from a production and consumption perspective (Bossen, 2000; Green, 2002; Jeong & Santos, 2004; Saleh & Ryan, 1993), and theorizations that have endeavoured to ground the nature and meanings of festivities (Bakhtin, 1968, 1984; Turner, 1974, 1982, 1983a, 1983b, 1984), there remains scope for a conceptual offering pertaining to the development of festivities. As host communities seek to enhance and diversify their attractions base through the creation and development of festivities, and there is evidence to suggest that they act as a stimulant to the tourism market (Getz, 1991;

Prentice & Andersen, 2003), there is a need for a conceptual underpinning to the nature and character of these events. This paper seeks to offer a theoretical overview of the heritage of festivities by tracing their chronological development, from the medieval to the modern day. Hence, Bakhtin's (1968, 1984) classic theorisation of festivity within traditional and medieval society, which is the precursor to their modern equivalent, is subject to critical examination. With reference to modern events, Rojek's (1995) thesis of Modernity 1 and 2 is drawn upon. In addition, key stages in the changing shape of modern festivities are identified and attention is paid to the changing face of tourism demand and the meaning of the tourism commodification process. Finally, the implications of tourism and festivity-based empirical research are noted. It is proposed that tourism processes reflect broader social changes within society and the consumption of festivities offers insights into identity creation, thereby contributing to an understanding of the arena of tourist lifestyles.

### **Bakhtin and Medieval Festivities**

The Bakhtin Circle of Russian thought focused their intellectual talents upon the philosophy of culture with Bakhtin at the helm. Signification in social life and artistic creation and, more specifically, the way in which language registered conflicts between social groups was a particular focus of study within the group (Brandist, 2001). A substantive portion of Bakhtin's work was embedded within the realms of literary theory, but his articulation of the concepts of heteroglossia (different languages in a discourse), dialogism (power relations within language), polyphony (multiple voices in texts), chronotype (time-space) and the carnivalesque (disruption of the social order and the profane) have extended far beyond that (Vice, 1997). Such has been the influence of these concepts, given their application and relevance to the contemporary world, that they have permeated film, post-structuralist, post-colonial, (*ibid.*), psychoanalytic, linguistic and literary theory. The role of tourism in mediating cultures and, more particularly, in mediating cultural performances provides an opportunity to examine Bakhtin's conceptualisation of the carnivalesque. For example, in the sense of whether there remains an inversion of the social order in those contemporary festivities that are subject to tourism commodification. There is evidence to suggest that the concept of the carnivalesque has been used in contemporary studies of festivities (Eco, 1984; Kates & Belk, 2001; Gilmore, 1998; Waite, 1998), but the application of Bakhtin to tourism and festivities is an area that has largely been left unrealised. Certainly there are particular difficulties in doing so, not least of which, is the application of the medieval to the modern, but Ooi (2002) has made considerable inroads towards an application of Bakhtin's dialogic approach to tourism studies. At this juncture, one must first outline the key tenets of Bakhtin's theory in relation to medieval festivities and the carnivalesque.

Rabelais' mythicised literary history of medieval festivities provided Bakhtin (1968) with a platform from which he could explore his conceptualisation of the carnivalesque. A clear distinction was made between festivities that either challenged or affirmed the existing order. Official festivities in the Middle Ages strove to legitimate and reaffirm the existing order of the day and sought to assert "all that was stable, unchanging, perennial: the existing hierarchy, the existing religious, political and moral values, norms and prohibitions" (Bakhtin, 1968: 9). In the production of festivities, histories were put to use within the carnival frame of reference in an effort to sanction the regime. The celebratory and spontaneous spirit of festivities was strictly controlled by the organising powers and, in such circumstances, the freedom to engage in participatory social relations was severely curtailed. The reason being that the fundamental purpose of these festivities was not to celebrate, but rather to maintain and reinforce the hierarchical structures in place. Bakhtin was sharply critical of these official, ecclesiastical, feudal and political festivities due to the restrictions placed upon them and the concomitant consequences upon participation. He argued that "the true nature of festivity was betrayed and distorted" (ibid: 9) for they did not create a "second life" for the people, the second life that was based around celebration and participation. Such an interpretation stands up to critique up to a point. One can hardly dispute his proposition that political festivities had the potential to preserve hierarchical structures and curtail the celebratory aspects of festivity for the purposes of social order. However, within the orbit of ecclesiastical festivities the situation is quite different, medieval festivities notwithstanding. Central to many religious festivals (e.g. pilgrimage to Mecca) is the opportunity to participate within a group and engage in authentic social relations with others, albeit within a different framework. Moreover, within such festivities there is the potential for a 'second life', but a different second life to the type that Bakhtin outlined, for this is not based according to an inversion of social order but rather of a second life in terms of the devout communing with the Divine Other.

It was those festivities that were the incarnation of play that Bakhtin devoted considerable attention and which are particularly significant within the current frame of reference. Celebrants had opportunity aplenty to overthrow the existing power structures and revel in the freedom that was thence accorded to them. Both Church and State temporarily suspended their regulatory powers and made concessions to the populace. Central to Bakhtin's arguments was that festivities were "the second life of the people, who for a time entered the utopian realm of community, freedom, equality and abundance" (1968: 9). Liberation, in the duration of the carnivalesque, was embodied in the structure of social relations. The participatory nature of festivities meant there was no division between performers and spectators. All were involved and all lived

the carnival experience for the duration as carnivalistic life was "life turned inside out" (1984: 122). Liberation extended to the rank and distance between people and resulted in free and familiar contact among all.

Structures governing everyday life were suspended. Hierarchical boundaries and their associated mores and symbolic codes of conduct were no longer adhered to but rejected. Within the carnival environment a sense of familiarity in attitude, the carnivalistic *mésalliances*, developed. The suspension of existing hierarchical structures and the change in social relations encouraged the development of violent comic images. Popular festive images were littered with violence, for example, bloodshed, dismemberment, burning, beatings, deaths, blows and curses and, on the surface, this had humorous connotations, but at another level, these images were infused with deep meaning. The deep meaning of these images arose from their relationship to what Bakhtin termed "merry time" (ibid: 211). Merry time was essentially regenerative time in the sense that the old could not be maintained and the new and youthful were self-generating. It was a time of death and regeneration. For example, images of death and uncrowning were linked to birth and renewal. Regeneration was related to death of the old. Popular festive images were a way of understanding the nature of reality and illustrating the process of its meaning and direction. Violence was part of Bakhtin's festive imagery and has the potential to be borne into realisation with explosive tendencies. Gilmore's (1998) ethnography of Andalusian festivities invokes the modern equivalent of the aggressive spirit whereby it was instigated against the authorities and peer group deviance. The power of the people in play can be recognised and acted upon by the state and a case in point is the Spanish Franco regime which banned carnival in 1937.

For Bakhtin, playful celebrations were authentic and unfettered expressions of intense emotion and sociability. Unhindered by regulatory forces, and free movement and participation for all contributed to a spontaneity in celebration. The authenticity of festivities centred around their structure, organisation, and the social relations that participants engaged in. The individual was part of a group in the mass of carnival attendees and, to an extent, lost a sense of the individual self while part of the group self (Bakhtin, 1968). However, the spirit of the carnivalesque was not exclusive to carnivals as they were also to be found during private family occasions (ibid.). As to their longevity, Bakhtin suggested that the carnivalesque spirit was indestructible. Though the spirit of festivities was subject to change ultimately it could not disappear altogether. Festivities offered a temporary respite from a utilitarian attitude and society and a release into a utopian realm (ibid.).

Bakhtin (1968) identified a number of features that characterised playful festivities. Their roots lay within ancient pagan festivities which were agrarian

in character, however, some forms of festivity were linked to feasts of the Church. Festivities enabled the celebrant to embark on a process of self-actualisation, albeit temporarily, as regeneration of the self and nature was at the heart of these activities. Indeed, change and renewal of the self was both welcomed and celebrated. Folk culture was expressed in three distinct forms during the carnivalesque. First, ritual spectacles that comprised of carnival pageants and comic shows of the marketplace. Second, the use of comic verbal compositions within festivities meant that humour was invariably directed at the upper stratum of society and the sources of power, namely the Church and State. Third, various types of what Bakhtin termed as *billingsgate*, which referred to curses and oaths.

The aforesaid unquestionably contributed to the shape and character of festivities but perhaps one of the underpinning characteristics of festivities was their relation to time, whether it was through an event in the natural cycle, or a period of historical or biological significance. The relationship between festivities and the cosmic cycle signalled a move to the future whereby the regeneration of nature and the self was intertwined with the change in seasons. Carnival time also signalled that it was a time of freedom for the participants, a time where all could participate and the boundaries, implicit and explicit among people, was suspended for the duration. The distinction between actual time and the meaning of time is developed and elaborated upon by Foley and Lennon (2003) in their conceptualisation of 'chronos' and 'chairois'. The former is related to the measurement of time and the latter to the experience of time. Hence, to apply such a conceptualisation to Bakhtin it may be suggested that the chronos relates to the actual cosmic cycle whereas the chairois denotes the suspension of order. To do so, illustrates the multi-faceted nature of conceptions of time and the way in which it may be deployed. A further dimension of the relationship between time and festivities is the way in which it can be commodified. In a study based upon the 'night-time economy' and the Edinburgh Hogmanay Street Party, Hughes (1999) argues that the extent and depth of festivity promotion has become such that time is subject to increasing commodification. In this capacity, the actual temporal sign (e.g. Hogmanay) and period is commodified to the extent that it is divorced and removed from its original signifying value. He goes to argue that to "relate something as seemingly superficial as a 'party', to cosmic time, is a reflection on the extent to which we have emptied these occasions of their ritual and mystical depth rather the absence of their cosmic origins. All we are left with today are the visual signifiers and decorative artefacts of earlier ritualistic practice – such as feasting and drinking at Christmas and the practice of exchanging greeting cards and presents" (ibid: 129). Hence, while the relationship between time and festivities is incontrovertible, the actual shape and character of this relationship is far removed from that discussed by Bakhtin,

in the sense that the meanings attached to it are subject to commodification forces which has implications for its meaning and significance.

Hence, the pertinence of Bakhtin's work is that it is not only a classic in the field, thereby warranting attention, but in addition it offers a theoretical framework to the realms of festivities. Given that his theorisation is located within medieval and traditional societies it can offer insights into the precursor to their modern equivalent and, furthermore, provide a platform to examine the development of contemporary festivities. Certainly, those festivities that are free from regulatory forces can be seductively liberating for their participants. In the midst of festivities that are infused with a sense of play, the hierarchical and social structures that govern society are temporarily suspended, thereby ensuring that all can socialise and participate freely. These are immensely powerful concepts to behold as one is entering into the realms of utopia - a utopia of egalitarianism and community spirit. For a fleeting moment power, status and class are inconsequential within the festival environment and this freedom accords its participants with a quintessentially sociable and participatory experience.

Nevertheless, there are certain limitations with Bakhtin's thesis. Bakhtin was inherently dismissive of ritualistic festivities that were subject to official manipulation. The restrictions placed on such festivities distorted and confounded their innate authenticity to the point of it becoming irrecoverable. The actual experience of ritual festivities became inauthentic as a result. The limitations and restraints placed upon both the event and participants meant the ability to participate freely was restricted, to the extent that participants were unable to pursue and engage in authentic social relations with others. In essence, there was no 'second life' for the people. Perhaps one interpretation of this could be that Bakhtin equated the manipulation of festivities as inauthentic, thereby contributing to an inauthentic experience for the self, and equated the spontaneous, free-flowing festivities as authentic thereby leading to authentic experiences for the self. There are particular flaws with such a proposition, particularly when one turns to ritual pilgrimages and the authentically social experience for their participants and, to a lesser extent, within political rituals.

Undoubtedly, the political manipulation of festivities alters the experience. However, this is not quite enough to support the argument that the politicisation of rituals negates their authenticity. In times of peace, participants may not fully recognise the ideological significance of events. It is at times of social conflict that it becomes visible. The politicisation of rituals does not necessarily detract from the fact that participants can resist the ideological claims of an event by pursuing an authentically social experience. Further, there is evidence aplenty to suggest that ritual pilgrimages can be utilised as a means for the authenticity of the self. For example, Turner (1974) maintained that in embarking on a pilgrimage the individual had opportunity aplenty to

engage in authentic social relations with others. Individuals pay homage to a Divine and genuine Other for whom they make this pilgrimage. The intention being to satisfy a question for existential inner or outer liberation. Pilgrimages to Lourdes, France by those who are physically incapacitated and/or seek internal solace would testify to this. In the midst of this, pilgrims engage in the social bonds of the *communitas*. Hence, pilgrims seek authentic liberation of the self and to participate in authentically social relations with others, all of which is intertwined with the authenticity of the experience.

To relate to Bakhtin's proposition, the relationship between external pressures and festivities, one must reflect upon his position for purposes of conceptualisation. It may well be significant that Bakhtin was influenced by the political regime in place at the time, the Stalinist dictatorship. Immense pressures were placed upon the personal and public lives of the people and, it is in this context, that Bakhtin must be understood and placed. There are commentators who suggest this thesis means something else altogether, "it is very tempting to see Rabelais as a dangerous joke at the expense of the Soviet authorities, and that it is they who are being lampooned obliquely when Bakhtin describes . . . medieval culture" (Vice, 1997: 151).

Bakhtin's assertion that all may participate freely within the play frames of festivity is debatable in the modern context. Although there is ample evidence to support the contention that hierarchical social structures are suspended during festivities (Boissevain, 1992c; Konrad, 1983; Walens, 1982; Da Matta, 1984), the cessation of structures does not function in all scenarios. Festival structures can replicate traditional gender roles (Lavenda, 1983) and the boundaries between 'insiders' and 'outsiders' in the community (Crain, 1996). In these situations, although they are firmly located within play frames they can serve to affirm the prevailing order.

Thus, it is evident from the aforesaid that the festivities literature is littered with concepts of 'ritual' and 'play'. What is notable is that these concepts can all be applied to the field of tourism. Elements of tourism indisputably focus upon play, play frames that are central to tourism, and act as a respite from the ritual and the order in one's life. In relation to ritual, MacCannell (1976) argued that tourism has become a ritual within contemporary society whereby there is a quest to escape from modernity and seek something else, the authentic. While this illustrates the value of the aforesaid theories and its applicability to the frame of reference, one must reiterate that the festivities discussed by Bakhtin were based in medieval and traditional societies. Such festivities are the precursor to their modern equivalent. However, the nature and character of festivities have been subject to change within modernity, and to enable an understanding of this transition Rojek's (1995) conceptualisation of Modernity 1 and 2 can usefully be employed in situating and place the tourism commodification process regarding festivity.



## Modernity, Festivals and Tourism

The move to an industrial and capitalist modern society invariably had an impact upon the nature of the carnivalesque. Indeed, under modernity festivities became much more controlled. The carnivalesque play frames that Bakhtin described were based upon temporary insurrection in that they could act as a safety valve for the people. Under modernity, festivities became increasingly subject to order. Rojek (1995) differentiates between Modernity 1 and 2. Although these concepts can be separated on a theoretical basis, Rojek argues that these processes are in fact interdependent. Modernity 1 was based on order and Modernity 2 centred on disorder. He argues that "in the name of 'progress', Modernity 1 sought to control both nature and society. This involved prioritising certain personality types and spaces in the social and geographical landscape and annexing others. The ideology of Modernity 1 identified normality with white, Christian, work-centred and propertied attitudes . . . [It] called upon individuals to commit themselves to a particular kind of self-making. The self was organised as a machine to accumulate value from leisure as well as work, and to consume commodities and 'civilised' experience" (ibid: 56). Hence, leisure was firmly linked to order, both order of a people and the activities in which they engaged in as it was part of the modern social order and inextricably intertwined with the civilising influence and morality. Leisure became related to progress and 'deviant' behaviour was marginalised. Consequently, the carnivalesque was suppressed under Modernity 1 for it was a visible and tangible symbol of obstruction to the power of the state. In addition, they were sites of disorder and irrationality, as the festivities that Bakhtin described threatened the social order and celebrated disorder and chaos. Rojek (ibid.) suggests that specific elements of the carnivalesque were pushed to the periphery of society, namely entertainment and freak shows, for these were not aspects of leisure that could usefully promote the civilising influence.

Modernity 2 occurred simultaneously to Modernity 1. "Modernity 1's attempt to arrange the rational differentiation of society generated irresistible de-differentiating tendencies. Modernity 2 should be understood basically in terms of a process of de-differentiation" (ibid: 101-102). This can be understood as a reaction arising from the social pressures of Modernity 1 and resulting in a degree of conflict. Thus, in such scenarios, the demonisation and repression of the carnivalesque under Modernity 1 contributed to their glamorisation and continued appeal. It is within these simultaneous forces, Modernity 1 and 2, that one can understand the commodification and consumption of festivities for such processes are a central and fundamental element of capitalist modern society. Ultimately, in the modern context, the shape and character of festivities was substantively altered as a consequence of the scope of civilising influences.

Furthermore, their commodification within capitalist society is in part due to the tourism commodification process as illustrated in the following discussion.

Historically, festivities in traditional society were primarily intertwined with the agrarian cycle. The demands placed upon agricultural workers were physically taxing, and, consequently, festivities usually took place following the completion of a major agricultural task (e.g. harvesting). For a brief period, agricultural communities were liberated from their commitments and had the opportunity to engage in sociable activities whereby affirmation of both community and culture was central to the event (Rolfe, 1992). Festivities continued to take place on a seasonal basis long after links with the agrarian calendar had ceased (Abrahams, 1982). Boissevain (1992a) elucidates upon the decline of European festivities following World War Two in an edited collection of ethnographic texts. Migration and the concomitant loss of festive manpower, increasing secularisation, and agricultural industrialisation were influential factors in their decline (Boissevain, 1992b). For example, Cruces and de Rada (1992) identified a number of minor religious festivities linked with the liturgical calendar (April-June) that had either disappeared or were in decline as a result of secularisation and changes within the Spanish agricultural economy.

However, this period of decline was relatively short-lived as new celebrations have been created and older ones revived in both industrialised and developing countries (Manning, 1983). This is contrary to received academic wisdom whereby it was suggested that in addition to the aforesaid factors, the rationalisation of production, mobility, mass media and liturgical reforms of the Vatican would have an adverse impact upon public festivities. Instead, festivities contain elements of invention, revival, resurrection and retraditionalisation (Boissevain, 1992b). Boissevain (*ibid.*) argued that festivals may be revitalised via a revival and resurrection of earlier traditions or they may be subject to a restructuring process of retraditionalisation to make them seem more authentic. At the core of festivity renewal is an element of the invention of tradition whereby customs are constructed and institutionalised for authentication purposes.

Explaining the growth in European festivity is problematic. The cause of their decline is well-documented and given that festivities have been subject to wide ranging and long-term external influences, a further decline may have been anticipated. However, a series of multi-faceted factors can be drawn upon to offer sustenance to the debate. First, the social costs of modernity are readily recognisable and festivities proffer an opportunity to recover something of the alienated self and react against homogenising forces of globalisation and consumption. In moments of play, however ephemeral, participants can regain a sense of community and belonging (Boissevain, 1992b), or, may engage in what Turner (1974) terms the spontaneous *communitas*. Second, the desire to

engage in sociable activities may be unquenchable and Bakhtin (1968) argued that the carnival spirit was essentially indestructible. Third, festivities may act as a means to reaffirm and rejuvenate social identities (Poppi, 1992). Finally, the resurrection, rejuvenation or indeed creation of festivities may also be seen as part of the commodification process, which is central to the modernity that Rojek (1995) discussed. In this regard, the commodification process through tourism has a direct impact upon the creation and reinvention of such events.

That this is the case can be attributed to the changes in the tourism product. The 1960s was characterised by a sun, sea and sand orientated tourism product within Europe, which by its very structure and mode of activity entailed a range of potentially detrimental environmental, economic, social and cultural issues that are well rehearsed (Britton, 1982; Cohen, 1978; Crick, 1989; Greenwood, 1989) within tourism studies. The maturing of the tourism product has since entailed significant segmentation. Increasing attention has been paid to both alternative tourism (Ryan, 2002; Smith, 1994; Weaver, 1995) and cultural tourism. With respect to the latter, commentators have noted that since the 1980s, cultural tourism has been considered a growth area (Craik, 1997; Richards, 1996a; Smith, 2003). Richards (1996b: 24) offers a conceptual definition of cultural tourism, "the movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs". For host communities, such a trend can be interpreted as beneficial given that these modes of tourism do not entail the equivalent detrimental impacts associated with mass tourism and, moreover, tend to be undertaken by higher socio-economic groups (Craik, 1997; Richards, 1996c) thereby offering particular economic rewards. These changes in tourism demand, in the form of cultural tourism and alternative tourism, also reflect wider social changes within society whereby greater emphasis is paid to cultural consumption, most especially to cultural activities that relate to stylised modes of living as a means of self-making (Featherstone, 1991). In this regard, the demand for cultural tourism activities relates to the mobilisation of consumer identity choices. Within the broad arena of cultural tourism, festivities and events act as one particular type of attraction that are subject to tourism commodification. For host destinations, the benefits of investing in events are multi-faceted. Getz (1991) suggests that events may be used as a means of contributing to sustainable forms of tourism development, act as an animator for attractions and facilities, expand the tourist season and place of destination, contribute to image-making in the destination, and act as a catalyst for urban regeneration. With regard to urban renewal, there is evidence aplenty to suggest that events are employed as a place marketing strategy and to stimulate the local economy and create employment for regeneration purposes (Evans, 2001; Gomez, 1998; Harcup, 2000; Hughes, 1995). However, the tourism commodification process brings

to the fore a set of circumstances relating to its impact upon the product and experience.

“Commodification’ refers, literally, to the extension of the commodity form to goods and services that were not previously commodified” (Jackson, 1999: 96). The commodification process is contentious and emotive due to the alleged deleterious impacts upon the authenticity of the cultural product and experience. In specific terms, questions have arisen as to whether commodification pressures have altered or squeezed the authentic carnivalesque spirit from events. Broadly, two interpretations of such processes may be delineated. The conventional wisdom suggests that tourism commodification pressures may render the cultural product inauthentic and the social relations therein. In this regard, host communities commodify their culture for economic gain. So seductive is the allure of tourism commodification that host communities commodify their festivities for economic gain (Boissevain, 1996) and the celebrant is unable to negotiate through commodified festivities and experiences a meaningless facet of local culture. Within such a scenario, the very authenticity that MacCannell (1973, 1976) argued tourists were desirous of attaining in the backstage region of social space - partaking of authentic social relations - is thwarted. However, alternative commentators have drawn upon post-modern theory to provide a counterpoint to conventional constructions of the commodification process. It is suggested that the individual is not a passive dupe of consumer society and that leisure and tourism roles can relate to practices of self-making, in realising the existentially authentic experience (Hughes, 1995; Wang, 1999). Certainly, cultural rituals can maintain their authenticity within the tourism commodification process (Daniel, 1996; Halewood & Hannam, 2001) and, furthermore, the possibility for the authentic experience can remain intact (Matheson, 2004).

Finally, the tourism commodification process in relation to festivities offers the potential delineation of a set of interlocked social and cultural factors. At one level, commodification illustrates the tensions between culture and enterprise. These tensions are not readily remedied and debates pertaining to commodification are likely to continue, particularly as host communities endeavour to widen their attraction base. At a more fundamental level, the commodification of festivities and, more particularly, the demand for cultural products relates to the negotiation and creation of identities and modes of lifestyle consumption. In this context, one may surmise that tourism reflects broader social changes within society. In general, one may reflect upon an increasingly secular society whereby politics and religion has less purchase. Further, consumption, both in terms of its economic and social functions, relates to identity structures, and their creation and maintenance. Leisure and tourism capitalises upon such an orientation towards consumption whereby consumers look to the marketplace to satisfy an increasingly broad range of

needs and desires. Commentators have sought to emphasize the role of tourism as a ritual and contemporary enactment of pilgrimage (MacCannell, 1973, 1976) and such ideas are encapsulated in the various manifestations of tourist lifestyles through the tourism markets. The increasing emphasis upon the cultural and environmental aspects of host destinations offers a way to understand what such consumers are seeking for in their identity construction and, therefore, relates to the broad arena of lifestyle marketing. Such an area warrants further empirical research and is one that can offer inroads into the demands of lifestyle consumers, thereby contributing to strategic development and innovations in the tourism product.

### Conclusion

In sum, this paper has outlined the heritage of festivities with regard to the medieval and modern event. Bakhtin's theorisation of medieval festivities has been outlined and subject to critical review. His exposition is fundamentally situated within medieval and traditional societies thereby entailing certain limitations. Although it is possible to draw links between the traditional festivities that Bakhtin describes to their modern counterparts, it would be foolhardy to apply these theorisations to the contemporary given the timeframe involved. This is not to dismiss his theory in its entirety for the value of Bakhtin lies within the historical contextualisation and conceptualisation of festivities. Moreover, it offers a platform from which one may frame and base the study of festivity. In an attempt to address these challenges attention has been paid to Rojek's (1995) theory of modernity. This offers a means by which one can understand the transition to modernity and the concomitant impacts upon festivity, namely the tourism commodification process. In this regard, phases in festivity development and the relationship to the tourism product and commodification process are outlined. The implications of tourism and festivity empirical research in relation to the tourism product are also considered. Finally, the implications of an analysis of the heritage of festivities are twofold. First, the competitiveness of the tourism industry, as demonstrated by the multi-faceted nature of tourism demand and, the very diversification of the tourism product, necessitates a greater understanding of the culture of tourism practices. An increased emphasis upon cultural tourism, of which festivities are an integral element, is but one manifestation of the changing shape of tourism demand and, in this context, has significance for tourism producers. In this context, the heritage of festivities offers one particular avenue to comprehend the culture of tourism practices. Second, the study of festivities, as Gilmore (1998) noted, offers insights into the inner structure and workings of society. As such, festivities are consumed, in part, as a means of identity creation and, therefore, provide a means by which to comprehend the creation of lifestyles and cultures of consumption.

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# Heritage Assets and Policy Tensions: Managing for Tourism and Social Inclusion

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**Abstract:** In recent years the UK Government has advocated changes in the way that heritage assets are managed, in particular the extension of free access to museums and other heritage resources, with the purpose of encouraging socially excluded citizens to make greater use of these assets. This paper will draw on empirical evidence from Scotland and argue that it is far from clear whether the imposition / lack of entry charges plays a significant role in encouraging or discouraging the use of such assets and, may in fact amount to a subsidy to wealthy tourists, in an area where there is evidence to suggest that they themselves seem willing to pay. In the conclusions to the paper it will be noted that given the lack of clarity as to whether policy is having its desired effect, it may in fact be desirable that monies currently spent on *integrating* social inclusion and the management of heritage assets might better be disaggregated, re-allocated and spent on more focused policy activities in the following three fields: social inclusion; the conservation of the heritage resource base; and, the development of the tourism product.

**Keywords:** Public policy, tourism, heritage, social inclusion.

## Background: Recent Policy Reforms

This paper seeks to examine the unplanned effects that changes in the British Government's social policies since 1997 have had on the management of heritage attractions and tourism in Scotland and the UK. Specifically, it will focus on recent changes in policy and administration and will refer directly to examples of the management of those heritage resources that underpin the British tourism product and which are crucial in understanding visitor motivations.

Following election in 1997, Tony Blair's 'New Labour' Government has sought to pursue the so-called 'third way' in its management of public affairs (see Giddens, 1998; Horton & Farnham, 1999; Greenwood et al, 2001). Since 1995, the language of the 'third way' has been used by Tony Blair to describe his political philosophy, one that is characterized as being beyond neo-liberalism and social democracy. Simply stated, the 'third way', as offered by its adherents, represents something of a renewal of social democracy for a political world in which the 'old left' lacks relevance and the utility of the 'new right' is negated by contradictions and inadequacies. As defined by Anthony Giddens (1999: 25).

"The Third Way seeks to go beyond the two hitherto dominant political philosophies of the postwar period . . . Each of these positions . . . still has its adherents. Yet it is plain that each is out of touch with the demands of the

moment. Few people – certainly not the bulk of the electorate in the developed countries – want to go back to top-down, bureaucratic government. But it has become equally obvious that society cannot be run as if it were a gigantic marketplace . . . People want something different . . . The Third Way is that something.”

In the early years of the Blair Government the ‘third way’ programme (together with the similar approach of Bill Clinton in the US and Gerhard Schroeder in Germany), was admired, courted and copied throughout the developed world. The clarion call of the ‘third way’ is pragmatism, growing out of its avowed aim not to be driven by the dogma of free-marketeters or democratic socialists. Even within the UK, a state lacking a codified constitution, with a gradualist political culture and tendencies in public policy towards incrementalism and contingency, the extent of the pragmatism underpinning the ‘third way’ is unusual.

The pursuit of the ‘third way’ has led to reforms in most areas of public policy. Some of these reforms have been specific to given areas of operation e.g. the modernisation of tourism structures (such as the 2003 merger of the British Tourist Authority and the English Tourism Council, see Department for Culture, Media & Sport, 2004) but many have been more general in their application. It can be argued that, as a result of the pragmatism incorporated within the ‘third way’ approach, recent policy reforms in the UK have less of a clearly identifiable ‘ideological stamp’ than those associated with previous British Governments such as those led by Lloyd George, Attlee or Thatcher. The pragmatism of the ‘third way’ allows for the continuation of Conservative programmes of privatisation in the public services to be combined with more traditional social democratic measures such as increased regulation of labour markets. Indeed, if anything can be identified as forming the core of Blair’s ‘third way’ it is a focus on trying to get the public sector (and industry) to think and act in a ‘joined-up’ way to tackle long-standing (and some may say intractable) issues that cut-across Departmental boundaries e.g. social injustice and sustainable development. As the Deputy Prime Minister noted (1999: 96), “it is essential that we find better ways of involving all sectors, and the public at large, in decisions. The government has sought to adopt an inclusive strategy . . .” Moreover, this quote also makes reference to the second clearly identifiable feature of the ‘third way’ in the UK, that is, partnership working between public, private and voluntary sectors.

The pressure for ‘joined-up thinking’ and ‘joined-up government’ has been partly driven by the European Union, which, since the Treaty of Amsterdam in 1997 has required all Member States to consider issues relating to equal opportunities and sustainable development when formulating, implementing or evaluating *any* policy (see European Union, 2004). However, in the UK in particular, the incrementalist nature of policy-making has meant that it has

not been unknown in the past for actions by the Government to result in giving with the right hand and taking away with the left. For example, maintaining low levels of personal income tax whilst pursuing redistributive social inclusion policies has led in part to considerable increases in the cost to payers of less progressive local property-based taxes, which are less effective as a redistributive mechanism than personal income tax (Press Association, 2003).

Thus, the third and final piece of the 'third way' jigsaw is the focus on social inclusion. This is supposed to permeate the work of all Government Departments and public bodies, including those for whom social concerns have not previously been of high priority. In the context of this paper examples of such Government Departments and public bodies would include those with responsibility for conserving the nation's heritage. Included here would be the Departments and public bodies that manage cultural assets (e.g. museums and galleries) and the nation's environmental assets (e.g. landscape and wildlife). In years gone by, such Departments and public bodies may well have paid attention to and indeed devoted resources from their budgets towards the pursuit of social goals. The difference today however under the 'third way' programme is that they are now all *required* to pay attention to and divert resources towards objectives of social inclusion, as part and parcel of 'joining up government', and to work in partnership with others to achieve this as necessary.

The authors of this paper do not wish to question the noble nature of the Government's aims. Joining-up efforts to tackle poverty and other forms of social exclusion is to be applauded, as is ensuring that actions are focused on problem-solving, through the adoption of organizational forms and managerial techniques that are based on notions of efficacy rather than dogma. However, the conclusions to this paper will also note that the pursuit of the 'third way' and its focus on joined-up government, partnership and social inclusion is also having unintended side effects, not entirely positive, for the management of the heritage and indeed for the wider tourism industry.

In summarising this introductory section to the paper it is important to note that the discussion will now proceed to give an overview of tourism policy (in this case focusing especially on Scotland as the organisational structures found in the constituent nations of the UK differ, as do the strategies which they pursue). Thereafter consideration will be given to the unintended effects of social policy objectives on the management of the nation's heritage attractions and conclusions will be drawn.

### **Tourism in the UK & Scotland: Overview**

The UK's decline from its dominant global position as the first industrialised nation can be traced back further than may be imagined. Indeed, the last quarter of the Nineteenth Century, often referred to as the 'Great Depression' (see

Bédarida, 1976) saw the UK lose industrial leadership of the world to others such as Germany and the United States. The decline in British manufacturing industry has been more or less continual since that time (although the rate of decline has varied greatly over the period) and today the UK's economy is heavily dependent upon the service sector. In today's service-sector economy, "Tourism is one of the largest industries in the UK, worth approximately £75.9 billion in 2002" (VisitBritain, 2004: 1). Indeed, according to Liz Forgan, Chair of the UK's Heritage Lottery Fund (2003), tourism is now the UK's sixth largest industry. The industry today accounts for about 4% of the UK's Gross Domestic Product and is even more significant in terms of employment, accounting for 7% of the workforce or some 1.9 million people (British Tourism Development Committee, 2001: 4). Its role in the Scottish economy is especially significant, employing as it does some 9% of the workforce here (VisitScotland, 2004: 1).

Britain is not known for its outstanding accommodation or cuisine, so why does it have a considerable tourism sector? The British Tourism Development Committee (2001: 4) notes that the UK's tourism product is based on "the rich diversity that Britain and its constituent countries have to offer – the unique environments, landscapes and heritages." If this assertion is correct, it can be assumed that most tourists choose a holiday or short break in the UK because of the cultural and environmental assets that the country and its constituent nations have to boast. This is especially relevant in the Northern parts of the UK. With beach resorts and weather patterns more similar to those of Northern France along the South coast of England, it is possible there to attract visitors seeking a beach holiday. This is not the case in Scotland, where it is, on the face of it, more likely that the tourism sector will be dominated by visitors seeking to explore the nation's cultural and environmental heritage. The Scottish Executive confirms this, noting that (2000: 4), "Scotland has the assets to be a world class tourism destination. It has magnificent scenery; a pristine natural environment; cultural and historic richness . . ." Data show that over two-thirds of the UK-domiciled tourists and over half of the overseas tourists who come to Scotland for holidays do so to experience this rich heritage (the balance come for reasons such as business and visiting friends and family). Moreover, these tourists are a wealthier and better-educated group than one finds in the population at large (for source of data and further information see VisitScotland, 2004).

When on holiday, the top ten activities undertaken by these wealthy and well-educated tourists to Scotland are as reproduced in Table I.

With the exception of swimming by UK-domiciled tourists, those activities that are less dependent on the cultural and natural heritage of the nation (swimming, golf and theme parks) are not rivalling in importance those activities that do depend upon Scotland's cultural and natural heritage (in

Table I: Key Characteristics of Tourists in Scotland (2003)

Activity Undertaken on Holiday	By UK-domiciled tourists	By tourists from overseas
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	16 %	16 %
Golf	8 %	2 %
Visiting theme parks / activity parks	8 %	6 %
Traditional regional music events	7 %	n/a
Fishing	6 %	3 %

Data extracted from VisitScotland (2004: 5)

particular castles etc., walking and museums etc.). As a consequence of these data, it is no surprise that VisitScotland has recently engaged in a branding activity that promotes Scotland around the following four themes: 'Culture and Cities'; 'Active Scotland' (outdoor recreation); 'Freedom of Scotland' (short breaks); and, 'Business Tourism' (VisitScotland, 2003).

To summarise, from the data in Table I it would not be inappropriate to conclude that a very large proportion of holiday activity in Scotland involves tourists engaging with the cultural and natural heritage. Furthermore, it is reasonable to assume that any policy which has an effect upon the management of these assets will also impinge upon the tourism industry. The inter-relationship between the cultural and natural heritage and tourism is crucial and it is of course for reasons including the improvement of performance when dealing with such inter-related issues that the focus on 'joined-up government' has been central to Tony Blair's 'third way' approach. Indeed, at both Scottish and UK levels there are now single 'joined-up' Ministries with responsibilities both for cultural heritage and tourism, but of course, 'joined-up government' is not the whole 'third way' story. Issues of social inclusion are also absolutely central to the UK Government's approach and this has led in turn to extending free access to cultural and natural heritage assets where restrictions (financial

and/or legal) were previously in place. It is to consideration of this issue to which this paper will now turn.

### **Social Policy Objectives & Access to the Heritage**

As part and parcel of its drive to pursue social inclusion policies the UK Government and the Scottish Executive have focused on *extending access to the heritage*. This has been the case in relation to both natural and cultural heritage and, as noted above, has involved a mixture of policy mechanisms including legislation, financial incentives, the provision of information to socially excluded groups etc. One example of the legislative approach is the extension of the right of access to open land with a number of restrictions provided by the Land Reform (Scotland) Act 2003. This extends the ability of people without significant wealth to enjoy the natural heritage for which Scotland is so famed without fear of persecution by landowners, provided that they exercise their new rights with responsibility. An example of the financial approach has been an increase in grant to National Museums and Galleries in order to remove admission charges, which were seen by the Government as posing a barrier to members of socially excluded groups who wished to gain access to the cultural heritage. As noted by Falconer and Blair (2003: 71, emphasis in original),

*“In December 2001, the ‘New Labour’ Government completed an incremental policy shift across the devolved polity of the UK that saw a significant increase in public investment committed to national museums and galleries that levied charges for general admission acted to remove these charges. The removal of general admission charges had been an important Labour Party policy in Opposition, and senior Labour politicians pointed to the 2001 removal of charges as a major achievement in relation to the Labour Government’s public policy agenda.”*

Thus, in relation to both natural and cultural assets, there is evidence that the current UK Government is acting in pursuit of its policy objective to extend access to the heritage in an attempt to close the gap in the opportunities available to socially excluded groups vis-à-vis non-excluded groups. This however begs the question, ‘Have the Government’s policy actions (legislation, subsidy, education etc.) actually achieved that which they set out to achieve?’

Research by Falconer and Blair (2003) on changes in visitor numbers to the UK’s National Museums and Galleries led to the conclusion that there has indeed been an undeniable increase in the number of visitors since the removal of admission charges. However, from their findings they also concluded that, *“it is less clear that this increase in visitor numbers can be explained simply in terms of the removal of charges . . . the link between the removal of charges and increased visitor numbers is more complex.”* Are the conclusions drawn by Falconer and Blair restricted to the UK’s National Museums and Galleries, which are but a small sample of the entire population of heritage attractions in the UK? In order to explore this question, further research has been undertaken by the

present authors, based on analysis of previously published data, gathered in the Scottish context.

The authors have sought to construct a picture of the effects of charges on visitors across a range of heritage / tourist attractions in Scotland. A comparative approach has been adopted, using data on visitor numbers to attractions with paid admission and to attractions with free admission. In undertaking this work the categories previously outlined in Table I were taken as a starting point for analysis. Those categories of activities that are less dependent on the cultural and natural heritage of the nation (swimming, golf and theme parks) were excluded from the analysis as the focus of this paper is on heritage attractions. Some other activities such as walking, fishing and traditional music events proved difficult to analyse as far fewer people pay an admission fee to partake in such activities. The converse is the case for the performing arts, to which free admission is offered only very rarely, and this activity has also been excluded from the analysis as a result. Despite these exclusions from the current analysis, the authors were able to find valid, reliable and representative data for one activity associated with the natural heritage (visiting nature reserves) and for five activities associated with the cultural heritage (visiting monuments; Churches; castles; heritage centres; and, museums and galleries). These data were extracted from *The 2002 Visitor Attraction Monitor* commissioned by VisitScotland and are presented in Table II (although 2003 data are available, the 2002 figures have been used here for the purpose of ensuring consistency with the period of time studied by Falconer and Blair, 2003).

**Table II: Changes in Visitor Numbers at Key Scottish Attractions 2001/2002**

Attraction Type	Change in visitor nos 01/02	Attractions with paid admission	Attractions with free admission
Nature Reserves	+ 18.7 %	44 %	56 %
Monuments	+ 12.7 %	96 %	4 %
Churches	+ 11.0 %	0 %	100 %
Castles	+ 9.2 %	95 %	5 %
Heritage Centres	+ 4.6 %	42 %	58 %
Museums & Galleries	- 3.2 %	37 %	63 %

Data extracted from Moffat Centre (2003)

Two main findings have become apparent from analysis of Table II:



- The first, immediately striking finding, is that the number of visits to Scotland's museums and galleries actually decreased in 2002 when compared with 2001. This is contrary to the findings of Falconer and Blair (who, as noted above, took the same two-year period for their analysis). However, it is worth noting that Falconer and Blair had adopted a whole-UK rather than a Scottish focus and that their work addressed the National Museums and Galleries only, which as previously noted, are a small sample of the entire population of museums and galleries and an even smaller sample of the population of heritage attractions. It is believed that these differences in sampling are alone sufficient to account for the differences between the two sets of findings.
- The second (startling and stark) finding adds quantitative weight to the qualitatively-derived conclusions of Falconer and Blair (2003), i.e. that the link between charging admission fees and visitor numbers is complex and cannot be reduced to a simple equation where the lack of an admission charge automatically gives rise to an increase in visitor numbers. There is undoubtedly a need here for further research into the complex causal mechanisms that may be at play here. From a cursory glance at Table II it can be seen that the number of visitors to Churches (100% free admission) increased by a greater percentage than the number of visitors to Castles (95% paid admission) but by a lesser percentage than the number of visitors to Monuments (96% paid admission). The category of heritage attraction with the second highest level of free admission (museums and galleries) was the only one to record a fall in visitor numbers from 2001 to 2002. The categories of heritage attraction with the third and fourth highest levels of free admission (heritage centres and nature reserves) recorded distinct differences in the rise in levels of visitor numbers despite very similar proportions of charging being applied in each category of attraction. If any conclusion can be drawn from Table II it is *that there is no clear pattern evident in terms of the relationship between charging and visitor numbers*. Although it is not clear precisely what this means for the efficiency and effectiveness of the Government's policy, it is certainly worthy of further investigation, either by the Government itself or by academic commentators and this theme will be re-visited in the overall conclusion to this paper.

Moreover, following further research two more findings of interest have become evident and are presented here:

- It had been thought by the authors that it was possible that the general increase in visitor numbers to heritage attractions seen in Table II may have been a consequence of a real-term decrease in the price of admissions over the period in question. Upon further examination however this hypothesis appears to be untenable. In the period examined the annual rate of inflation was between 1.7% and 1.8% (Office for National Statistics,

2003) yet the level of adult charges to heritage attractions over this same period increased by 7.5% on average (Moffat Centre, 2003), over four times the rate of inflation. The same measure when applied to child charges showed an increase of 5.7% on average (Moffat Centre, 2003), over three times the rate of inflation.

- Scotland's singular most popular heritage attraction, in 2003, 2002, 2001 and indeed for many years prior has been Edinburgh Castle. The Castle is not only a paid admission attraction, but one which charges (at time of writing in 2004) £9.50 for adult entry (Historic Scotland, 2004). This compares to average admission charges to heritage attractions in Scotland in 2003 of £3.78 for adult entry (Moffat Centre, 2004). The Castle saw an increase in visitor numbers of 2% in 2002 when compared with 2001 and a further similar rise of 2% again in 2003 (Moffat Centre 2003, 2004). In comparison, Scotland's second most popular heritage attraction is the Kelvingrove Art Gallery & Museum in Glasgow which has free entry and which saw a decrease in visitor numbers of 7% in 2002 when compared with 2001 (Moffat Centre, 2003). Unfortunately more recent figures are not available for Kelvingrove as it is currently closed for works, but the data which are available suggest that demand for visits to heritage attractions is somewhat price inelastic and that willingness-to-visit is not necessarily dependent on willingness-to-pay. If this is indeed the case then it may well be of great significance as regards the likelihood of success for the Government's policy to widen access to the heritage.

Overall then, by analysing the data presented in Table II it can be seen that there are a number of questions that can be posed in relation to the validity of the Government's policy assumption that charges act as a significant barrier to access to the heritage for socially excluded groups and that the removal of charges will result in greater social inclusion. Of special relevance to this paper is the question of whether the Government's moves to increase social justice have done anything other than subsidise that great proportion of visitors to heritage attractions who are tourists. As identified earlier, they are in fact a wealthier than average and better-educated than average grouping. It is possible that the Government's well-intentioned policy of removing barriers to access has simply resulted in taxpayers' money being used to subsidise wealthy tourists, diverting resources away from both social justice programmes that may be of greater value to those in poverty and indeed from heritage conservation and tourism development budgets too.

### **Admission Charges, the Heritage & Government Policy**

Research demonstrates that the actual level of expenditure on admission charges by tourists is very low when compared to expenditure on other services and products. Please see Table III for an overview of tourist expenditure by service

/ product category in 2002 (the 2002 data have been used as, although more recent figures exist for UK-domiciled tourists, they do not exist for overseas visitors).

**Table III: Tourist Expenditure by Service/Product in Scotland in 2002-03**

Service / Product	UK Tourist Spend		Overseas Tourist Spend (2002 only)
	2002	2003	
Accommodation	24 %	28 %	33 %
Eating & drinking	21 %	20 %	21 %
Travel (internal)	23 %	18 %	9 %
General shopping	6 %	7 %	13 %
Package holidays	5 %	6 %	n/a
Entertainment	7 %	7 %	3 %
Clothes	9 %	8 %	13 %
Other	5 %	5 %	8 %

2002 Data extracted from VisitScotland (2003: 5)

2003 Data extracted from VisitScotland (2004: 5)

From Table III it can be seen that admission charges paid by tourists fall within the ‘Other’ category of expenditure. Thus, it can be concluded that UK tourists spend no more than 5% of their budget on admission charges and that tourists from overseas spend no more than 8% of their budget on admission charges. Moreover, in relation to data gathered by the Moffat Centre (2004) on issues that have a negative influence on tourism in Scotland, admission charges were reported by only 1% of a survey sample of 419 tourism professionals as a “Negative Factor Receiving any Mention”. Thus, it is safe to assume that the level of admission charges to heritage attractions is not a major factor that needs to be addressed from the perspective of Scottish tourism policy. Indeed, The Scottish Executive (2000) states boldly that the central thrust of tourism policy must be informed by the fact that, “If Scotland’s tourism industry is to grow much will depend on the quality of service we provide to visitors,” with this reference to service quality applying in the main to food and accommodation.

Given that demand for access to heritage attractions would appear to be unrelated in any clear sense to charging policies and that demand where charges do exist appears to be relatively inelastic, might the Government be better off reverting to a situation where all heritage attractions are able to charge entry

fees? Edinburgh Castle does not seem to have suffered from its charges yet visitor numbers to the (predominantly free) museums and galleries in Scotland appear to be dropping. It costs the public purse dear to subsidise the National Museums & Galleries for income which they have foregone as a result of social policy objectives that have promoted the provision of universal free access to these cultural assets. What are the opportunity costs associated with the current policy direction? In the tourism field one opportunity cost of providing wealthy tourists with free access to heritage attractions (which they seem to be perfectly happy to pay for themselves) is the lack of sufficient monies to improve “the quality of service we provide to visitors”, which the Scottish Executive has identified as being the top priority. Every pound spent subsidising a wealthy tourist’s visit to a heritage attraction on social policy grounds is a pound less spent on infrastructure and training to improve the quality of service offered to tourists, which are well-established needs. This pound has instead, as a result of the universalist approach adopted, been used to subsidise everyone visiting heritage attractions, including wealthy and well-educated tourists, whom it would appear do not need this subsidy. Moreover, whilst on the one hand the universal subsidy of public services does ensure that all have an equal chance to walk in the door of one of the nation’s great cultural institutions for no money, this does not necessarily provide equal opportunities *per se* as these are equally dependent on education, transport and many other variables. Finally, universal provision tends to be regressive and the use of the public pound in this manner is contrary to the broad aims of the Government’s social justice policy, namely, to manage a redistribution of funds in favour of the have-nots in society. The regressive nature of universalist State provision has been well-known for decades (e.g. see Le Grand, 1982) and the general policy direction in the UK has in fact been more towards targeted provision of services in recent years.

## Conclusions

To conclude this paper, the authors wish to re-state that they believe the UK Government’s aims in seeking to extend access to the cultural and natural heritage to be noble, however, the questions that they pose are these:

- Is the Government’s current strategy the best way to achieve its stated aims of social justice and what are the opportunity costs of its regressive, universalist approach?
- What are the opportunity costs for tourism development associated with using public money to provide free access to heritage attractions rather than for training and infrastructure development pursuant to service quality improvement?

Bearing these questions in mind, the conclusions to this paper are as follows:

1. Tourists represent a generally wealthier and non-excluded social group. Allowing them free access to heritage attractions is expensive, unnecessary and regressive. If willingness-to-visit and willingness-to-pay are, as suggested here, at best indirectly related and if tourists have no concerns about paying to visit heritage attractions it may be better to allow them to do so and to use public monies to help improve service quality, an area where tourists and the Government alike have shown concern for many years.
2. Although some recompense has been given to the National Museums & Galleries in exchange for their dropping admission charges, if the Government's aim of dramatically increasing the numbers of socially excluded persons visiting these heritage attractions were to be achieved it will become a double-edged sword. Large increases in visitor numbers bring with them additional management costs and if these costs are to be covered without further State subsidy or recourse to charging, the institutions may have to make savings on other areas. These may include the 'core' of the operations themselves i.e. conservation of the heritage. Success in social justice terms may, in the long run, threaten the well-being of the heritage resources that the heritage sector exists to sustain.
3. There are, in the UK and elsewhere, many examples of non-universalist policies being used to enrich the lives of the socially excluded. For example, in the leisure sector many schemes abound where such socially excluded citizens can be provided with access to services through targeted redistributive provision e.g. the *Access to Leisure Scheme* (Aberdeen City Council, 2004) at lower cost and with greater effect than through universalism.

Finally, as a result of issues highlighted in this paper, there is undoubtedly a need for further research into the complex causal mechanisms that underlie the inter-play between admission charges and motivation to visit heritage attractions. Without a full and proper understanding of such mechanisms any policy decisions in this area are being made on the basis of flawed information, therefore, if the New Labour 'third way' project in the UK is to achieve its central aims, there may be a need to re-think policy in relation to admissions to heritage attractions.

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## Heritage Assets and Policy Tensions: Managing for Tourism and Social Inclusion

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# Towards an Understanding of Visitor Perceptions of 'Dark' Attractions: The Case of the Imperial War Museum of the North, Manchester

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**Abstract:** Governments and other authoritative stakeholders are faced with dilemmas regarding the representation of sites associated with death and disaster in the context of tourism visits. Not least of these are the owners and managers of museums in the UK which are concerned with the commemoration of war-related events. This paper contributes towards an understanding of how visitors perceive interpretation employed by museums using modern and traditional exhibition techniques. The hypothesis that visitor perceptions of 'dark' issues in museum can be influenced using commentary and 'live interpretation' will be tentatively confirmed. The 'sanitised' war museum paradigm will be contrasted with modern and thought provoking exhibitivite techniques used within the Imperial War Museum of the North, Manchester.

The paper will introduce the phenomenon of 'dark' tourism and confirm a documented level of interest in this area. It will review interpretations of 'dark' sites and particularly, interpretation provided by the Imperial War Museum of the North, Manchester, UK. Research based on visitors to this museum in 2004 is cited in order to identify critical success factors in interpretation used by this Museum.

**Keywords:** Imperial War Museum of the North, dark tourism, interpretation, thanatourism.

## List of Abbreviations

BPS	The Big Picture Show
IWM	Imperial War Museum (London)
IWMN	Imperial War Museum of the North
MOD	Ministry of Defence
SPSS	Statistical Package for the Social Sciences

## Introduction

An increasing number of authors are addressing the attraction of death and disaster in the context of tourism behaviour (Lennon and Foley, 2000; Seaton, 1996; Dwork and Van Pelt, 1997). A common theme that emerges is the problem that faces governments and other authoritative stakeholders in representing sites associated with this phenomenon, within the bounds of veracity and appropriateness. Many 'dark' attractions are viewed by some as exploitative, over-commercialised or sensationalised. The result of such representations may mean that information can be presented to visitors in an inaccurate way. This may leave some (individuals) with reflections or opinions which are based



on the influence of the exhibitor, and are perhaps non-factual, or erroneous. One of the dangers may be the outright distortion of historical facts leading to misunderstanding and misrepresentation of events. The paper seeks to explore the impact on visitors of various communications media used in the Imperial War Museum of the North (IWMN).

### **Dark Tourism and the Significance of War**

The nexus between war and tourism according to Seaton (1999) has been a widespread and long established phenomenon. Thanatourism has involved the movement of visitors to sites associated with recent and historic incidences of death and disaster. These range from 'primary' sites, such as holocaust camps to sites of celebrity deaths. Seaton (1999: 131) highlights the significance of 'secondary' sites (such as museums and memorials) and these are described as "... symbolic representations of particular deaths, in locations unconnected with their occurrence." Seaton (*ibid.*) cites five motivations for travelling to 'dark' sites as:

- travel to witness public enactments of death;
- travel to see sites of mass or individual deaths after they have occurred;
- travel to internment sites of, and memorials to, the dead;
- travel to view material evidence/symbolic representations of particular deaths;
- travel for re-enactments or simulation of death.

The memories of warfare, according to the literature, last for generations. War is packaged into so many sources of entertainment aimed at all generations, ranging from video games to theatre, war re-enactments and films. Smith (1998: 219) develops the five motivational perspective suggested by Seaton (1999) and relates them to war and tourism under the categories of:

- emotional tourism;
- military tourism;
- political tourism; and,
- future war tourism.

Lennon and Foley (2000) give further clarification to war and its relationship to tourism using the term 'dark tourism'. The authors emphasise the problems that face tourism bodies / related organisations in presenting sites to the public. Of further interest (Lennon and Foley, 2000) are the remarks made by these authors on the use of media and other forms of oral and non-oral commentary styles used at sites. The consequences of some of this interpretation can include,

at best, incorrect or poorly communicated information and, at worst, falsifications of historical fact.

Holocaust sites are examined in the context of 'dark' attractions in Beech (2000) with particular reference to defining the types of tourists who visit. The author identifies visitors who have a personal connection with the site e.g. survivors, relatives etc., and general visitors with no direct or indirect connection. It is suggested that these tourists are 'buying' distinctly different products / experiences with different product lifecycles.

To develop the theme of representation of thanotourism sites, Duffy (1997) suggests that Holocaust museums (primarily in the United States) are challenging the traditional paradigm of representation. The writer argues that the European Holocaust has become a 'popular' concept reinforced by films (such as Steven Spielberg's *Schindler's List*) and the serenity of wartime commemoration. Such popularity has led to the questioning of the purely descriptive methods often employed by owners of museums with a Holocaust theme. Indeed, Duffy makes mention of the Anne Frank Museum in Amsterdam and its increasing association with contemporary intolerance, focusing on right wing political movements in Europe.

This change would appear to be a shift in the way that some museums wish to convey information to the visitor. Rather than simply presenting information on historical events, an attempt is made to 'modernise' the meaning. In order to develop this argument, the following discussion will examine interpretation and representation, firstly in general terms, and then in the context of war museums.

## Representations and Interpretation

The context of motivation has to be understood in terms of interpretation, which can be defined as,

"A set of communication techniques of varying degrees of effectiveness in varying situations which can be used to get particular messages across to particular groups of people. Interpretation becomes an adjunct to the communications industry."

(Uzzell, 1992: 5)

The quotation is given further context in its application to museums,

"The heritage industry is in the business of mass communication, and the boundary between museums and media, and that between reality and fantasy, between myth and mimesis in both sets of institutions is becoming increasingly blurred, increasingly indistinct."

(Silverstone, cited in Uzzell, 1992: 138).

There are a number of observations, which have been put forward in the study of the relationship between war and tourism motivation, and it is also feasible to suggest that the reasons for tourist visits are multifaceted. It may be argued that visitation is driven by emotion, which may range from genealogical interests and nostalgia visits, to raw curiosity. The fact that emotion is considered to be one of the primary motivations (Smith, 2003) may have implications when considering the presentation of information (see Siegenthaler, 2003). Indeed there is a mix of further motivations evident, including entertainment, curiosity and education.

Seaton and Lennon (2004: 2) argue that the media play a crucial role in visitation and perceptions of sites. Indeed, the authors suggest (using the example of the murder of school children in Dunblane, Scotland in 1997) that in Britain, "they (the media) have periodically constructed a meta-narrative of moral panic around it (thanatourism), through sensational exposes of dubiously verified stories."

However, the 'chronological distances' (the length of time since a tragic, or 'dark' event has occurred) inherent in historic memorial sites such as Auschwitz (Lennon and Foley, 2000), or in some museums, may be more difficult to bridge in terms of accuracy using commentary and interpretation methods. In both situations, it can be argued that commentary often sensationalises the event, or offers an abridged or biased communication of historical events.

Further evidence of distorted interpretation is given in the tourist guide books analysed by Siegenthaler (2002) in his research on dark sites. According to this author, victims of the Hiroshima and Nagasaki bombings are almost absent from both text and illustrations. It is suggested that such remembrance is selective, and outside of time and historical circumstance. Emphasis is placed on encouraging the tourist to view each city in a post-war context, rather than raising wartime concerns. Indeed, one remembrance website and online museum (<http://www.csi.ad.ip/ABOMB/>) contains a quote by its designer (Professor Mitsuru Ohba) posted as follows,

"The website is neither meant to condemn nor condone the bombing, but is meant as a way for people to express their views on how to achieve peace, on what peace is, and other thoughts about peace. We hope that everyone will write in their thoughts."

The mission statement of this website is to provide all readers with accurate information concerning the impact that the first atomic bomb ('Little Boy') had on Hiroshima. Once again the 'darker' issues associated with the historical event are eschewed, and the website visitor's attention is drawn to the importance of peace, as opposed to the 'darker' aspects of war. The relevance of the methodologies used to present information on the Japanese bombings have implications for tourist interpretations of dark / thanatouristic sites.

## **Museums and the Centrality of Interpretation**

To legitimise the importance of interpretation in the 'arena' of dark tourism in museums, it is necessary to review existing literature. Uzzel (1992) challenges the role of interpretation in changing attitudes and behaviour. This author considers the lack of papers examining the effectiveness of interpretation in the museum environment. One critical difference between interpretation and conventional instruction is acknowledged by Ham and Krumpal (1996: 2) who argue that,

"Interpretation, by necessity, is tailored to a noncaptive audience - that is, an audience that freely chooses to attend or ignore communication content without fear of punishment, or forfeiture of reward as in an academic setting where students must pay attention to course material in order to pass exams and receive good grades. Audiences of interpretative programmes . . . freely choose whether to attend and are free to decide not only how long they will pay attention to communication content but also their level of involvement with it."

This infers that museum visitors are also likely to be selective not only in terms of the materials that they view, but also about their level of interaction and the subsequent opinions they form.

An analysis of the development of contemporary museum exhibits is made by Alsford and Parry (1991). They acknowledge that 'live interpretation' has become a popular interpretative technique and suggest that the technique existed during the first half of last Century, in the form of guided tours. The trend towards more modern methods, it is suggested, has evolved as a result of the increasing use of 'popular culture' in the form of media such as magazines, film and television. These methods include the use of audio and visual museum media incorporating technology such as television screens and loudspeakers. It is argued that such methods of interpretation may engage the intellectual participation of visitors,

". . . by encouraging them to register their own judgements on the issues. Slavery, funerals, crime, temperance and religious revivals are among the value-ridden subjects which have been tackled."

*(Alsford and Parry, 1991: 9)*

Interactive exhibits, according to Fernandez and Benlloch (2000) are an example of modern interpretative communications media employed by some museums in order to present information in such a way as to capture and hold the attention of the visitor. It is argued that interactive techniques employed by museums are a valuable learning resource for visitors, particularly from schools and colleges.

Retention capacity has an important role to play when considering visitor interpretation in museums. From the point of view of the museum, it must use methods which are valued by the visitor (such as theatre and sensationalism) in order to sustain attendance revenues. Perkins (1999: 2) questions the authenticity of artefacts when they are complemented with (or replaced by) informational displays or interactive exhibits.

The phenomenon of the 'heritage spectacle' is examined in Walsh (1992) where it is noted that the reconstruction of historic events has been going on for at least a century. Walsh acknowledges the use of multi-media and interaction in the Imperial War Museum, London. The museum's centre-pieces are the 'Blitz Experience' and the World War I 'Trench Experience'. In reviewing the Trench Experience it is noted that (Walsh, 1992: 111),

"The installation invites the public to relive a moment of history . . . Once inside each visitor feels the full impact of the battlefield with gun flashes, smoke, sound re-enactment and authentic smells"

Walsh calls into question the authenticity of such representations, claiming emphasis lies on the authenticity of form, rather than that of experience. In this sense, it would seem that interpretative techniques used, particularly in heritage museums, have influence over the preservation and appreciation of exhibits by the public.

Whitmarsh (2000) argues that the commemorative aspect of war museums directly affects their style of interpretation. The literature also contends that war museums historically seek to focus on 'safe' and uncontroversial ('sanitised') subject matter. Specifically, the author claims technology is a frequent theme within war museums, since this aspect of war is usually accepted, rather than questioned.

The next section of this paper will focus on the Imperial War Museum of the North (IWMN) which purports to offer the visitor an impartial insight into the human and social costs of war (Forrester and Walker, 2004).

## **The Imperial War Museum of the North**

The flagship war museum within the UK, The Imperial War Museum (IWM) in Lambeth Road, London was created in 1917. In total there are also four other IWM sites, which are: Duxford, Cambridgeshire; the Cabinet War Rooms, London; HMS Belfast, London; and, the IWMN in Manchester. The IWM London is the primary resource centre for all these sites. Artefacts and exhibits are released to the Northern museum at the discretion of the IWM London who receive these, in the first instance, from the Ministry of Defence (MOD).

The IWM is comprised of permanent exhibitions offering specific areas of interest to its visitors, including the Cabinet War Rooms, the Holocaust

Exhibition and the Crimes Against Humanity Exhibition. The IWM London also contains various thematic art galleries and provides learning resources for students and other interested parties.

The IWMN was opened in July 2002, and attracted 384,000 visitors in the first part-year of operation (July 2002 to March 2003). The operators estimate some 280,000 visitors in the second year. The museum does not charge for admission. The IWMN is located in the Salford Quays area which comprises hotels and attractions including Old Trafford (the Manchester United Football Club stadium), the Lowry Project (encompassing The Lowry Designer Outlet), The Plaza and The Digital World Centre. The museum was designed by leading contemporary architect Daniel Libeskind and the building itself is considered to be one of the primary features of the museum which is often the focus of writing (see for example Forrester and Walker, 2004; Handley, 2002). The exterior is made almost entirely from aluminium and is intended as,

“... a visionary symbol of the effects of war ... The building is based on the concept of a world shattered by conflict, a fragmented globe in three interlocking shards. These shards represent conflict on land, in the air and on water.”

(<http://www.iwm.org.uk/north/background.htm>)

The interior was also designed with the intention to address social issues of warfare and was set out ‘awkwardly’ in order to intentionally disorientate the visitor. The principal message that the IWMN wish to communicate to visitors is the idea that ‘War Shapes Lives’, indeed this is inherent in the museum’s marketing slogan (IWMN, 2002). The museum attempts to communicate this notion primarily through the use of a mixture of interactive displays including audio-visual media. The IWMN brochure states that, “The Museum’s collections reflect people’s varied experience of war ... The Timeline (explained later) puts people’s experiences into a chronological framework” (IWMN, 2002).

Crucially, the IWMN wishes to explore and represent a social side of war, rather than provide an opportunity for visitors to ‘marvel’ at large displays of ‘sanitised’ technology. The social experience is confirmed in Handley (2002) who noted, “Through its bunker-like entrance the human perspective takes over and the museum’s marketing label – War Shapes Lives – is given full meaning ... The enormous main exhibition space gives way to six ‘silos’ (small enclosed areas concerned with specific themes) housing more intimate exhibitions ... Experience of war, its legacy, women and war, impressions, science and the effects of war.”

The author goes on to panegyrisé the museum as a place of imagination and innovation. The Silos referred to in this article are one of five features which

## Towards an Understanding of Visitor Perceptions of 'Dark' Attractions

are paramount to the experience of the IWMN. These are listed (IWMN, 2002) in Table I.

**Table I: Five Features of the Imperial War Museum of the North**

Feature	Description
1. The Big Picture Show (BPS)	This is what the museum assert is their main attraction and is an audio-visual 'show' exploring war. Images are projected onto every wall (and people around walls) filling the entire Exhibition Space with a quite loud and highly visual short film (circa 15 minutes). The three films listed in the 2004 brochure are: <ul style="list-style-type: none"><li>• Children and War</li><li>• Why War?</li><li>• Weapons of War</li></ul>
2. The Timeline	This is a large mural spread around the perimeter of the Main Exhibition Space that offers a chronological, visual tour of warfare throughout the twentieth century. The events cover the First and Second World Wars, the Cold War and images of the September 11 <sup>th</sup> , 2000 terrorist attacks on the World Trade Centre in New York, USA.
3. The Silos	Six towering 'enclaves' each with its own intimate sub-theme. These are: <ul style="list-style-type: none"><li>• Experience of War</li><li>• Women and War</li><li>• Impressions of War</li><li>• Empire, Commonwealth and War</li><li>• Science, Technology and War</li><li>• Legacy of War</li></ul>
4. 'Time Stacks'	Within each silo the visitor can 'call up' objects from the museum's collections by touching a button, and in some cases actually examine historical artefacts.
5. The Viewing platform	At the entrance to the museum (which is designed to mimic an air shard) there is an elevator which transports visitors 150 feet up to a platform.

There are other ancillary features which include a café, a restaurant and the 'Green Room' which is a designated learning area. The IWMN hosts a number of events throughout each calendar year which are referred to as 'Special Exhibitions'.

The museum was selected as an appropriate 'dark' attraction in which to carry out empirical work on visitor interpretation / perception in an attempt to offer some insight which may be significant for the broader arena of 'dark tourism'. In the next section of the paper, reportage of the research will be provided.

### Research Findings

Permission to visit the IWMN to carry out intercept questionnaires was sought and granted with minimal restriction. Questionnaires were administered over

three periods in early 2004, for some eight days in total. Interviews were conducted with visitors who had recently exited the Main Exhibition Space. Some 150 responses were gained over the eight-day period, and the main findings are detailed below.

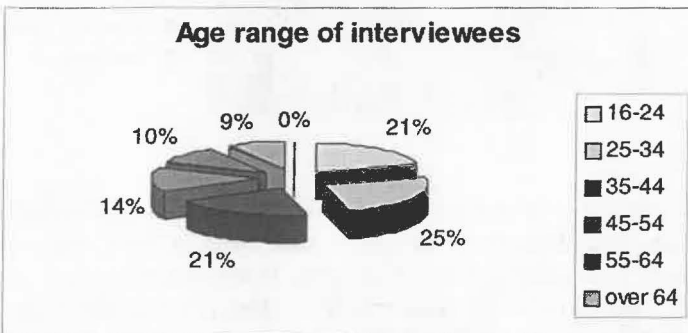
Since the desired sample of respondents was reasonable (n=150) the Statistical Package for the Social Sciences version 11.5 (SPSS) was selected to analyse data. It should be noted that the primary limitations associated with this research were those of time, location and sample. The research was carried out only at a particular time of the year (late January to late February). In addition, another researcher was distributing separate questionnaires during the second visit to the museum, which meant that the interview sample was effectively reduced to around 50% of the total visitors during this time. A gender analysis of all interviewees is presented in Table II.

**Table II: Gender Analysis of Visitors Interviewed**

Gender	Number	Percentage
Male	77	51%
Female	73	49%
<b>Totals</b>	<b>150</b>	<b>100%</b>

The interviewer was asked to refrain from questioning any visitor under the age of 16. An almost even split between genders is apparent from Table II. The range of ages of the interviewees is presented in Figure I.

**Figure I: Age Range of Interviewees**





The final analysis of basic information, place of residence of interviewees, is presented in Figure II.

**Figure II: Place of Residence of Interviewees**

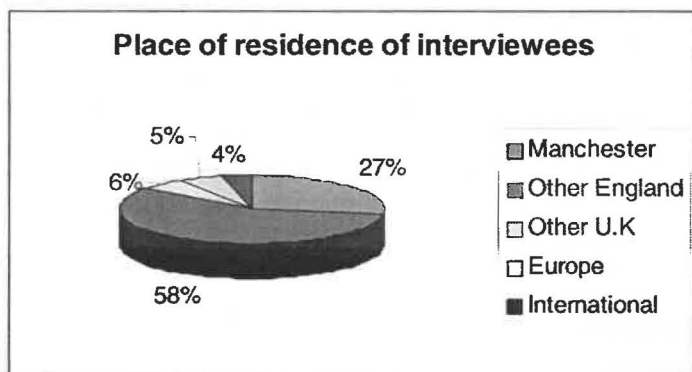
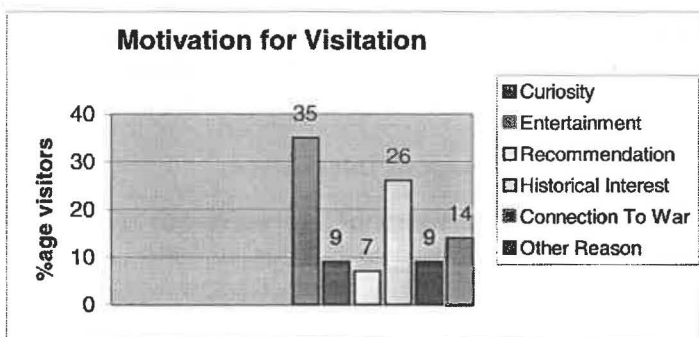


Figure III presents findings on the reasons why interviewees visited the museum.

**Figure III: Motivation for Visitation to the IWMN**



The majority of interviewees came to the museum to satisfy curiosity, perhaps confirming the claim by Slade (2003) that visits to 'dark' sites can often be incidental. The next significant category is visitors motivated by historical interest, whilst a minority of interviewees identified that they were motivated by a personal recommendation from a third party. The mix of motivations tentatively confirms the argument given in Kotler (1994, cited in Beech, 2000) that each type of visitor is 'buying' a distinctly different experience.

The other significant piece of analysis is the likelihood of interviewees visiting a similar attraction in future, which the interviewer clarified as meaning 'any

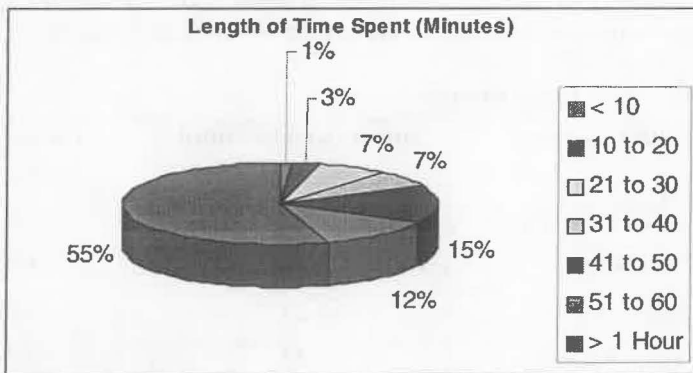
attraction associated with war and conflict'. The findings are presented in Table III.

**Table III: Future Visitation to Other 'Dark' Attractions**

Likelihood of Visiting a Similar Attraction	Number of Interviewees	Percentage
Very Likely	86	57%
Likely	42	28%
Not Sure	13	9%
Unlikely	7	5%
Very Unlikely	2	1%
<b>Totals</b>	<b>150</b>	<b>100%</b>

The results confirm a high level of interest in this type of attraction, with only 15% of the sample suggesting any aspiration to rule out visiting a similar site. Other motivational data included the number of interviewees who bought items from the shop and the length of time spent in the museum. Figure IV presents data on the amount of time visitors spent in the museum.

**Figure IV: Time Spent by Interviewees in the IWMN**



More than half of the interviewees (55%) spent over an hour in the museum, with a further 27% spending at least over 40 minutes (the longest visit was three hours). The fact that a significant majority spent over an hour in the museum may go some way towards confirming that media and interactivity captivates the audience and holds the visitor's attention (Fernandez and Benlloch, 2000).

## Towards an Understanding of Visitor Perceptions of 'Dark' Attractions

The literature review set out some of the main methods by which museums and other 'dark' sites set about influencing visitor interpretation. At least five significant methods of presenting information to visitors in such a way as to influence interpretation were identified. These can be listed as:

- the use of multi-media, or 'live' interpretation (Alsford and Parry, 1991);
- the use of displays;
- the use of interactive exhibits (Fernandez and Benlloch, 2000);
- providing human commentary, including tours;
- captivating imagination and holding attention (Ham and Krumpal, 1996).

The following analysis in the context of IWMN attempts to measure the extent to which this element of the IWMN's aims / mission was realised.

### Interpretation of Multi-Media ('Live' Interpretation)

The Big Picture Show is considered by the museum as their 'unique selling point', and they suggested that this feature was perhaps the most celebrated aspect of the visit. The finding for 'enjoyed most' confirms the level of interest with a majority of 39% identifying this aspect as the most enjoyable feature. One hundred and twenty-seven of the visitors interviewed, or 85%, confirmed that they had experienced a 'show' whilst in the museum. In order to assess how influential this feature was, visitors were asked to identify the theme of the show they had watched (from three possible themes available). The results of visitor interpretations of this feature are detailed in Table IV.

**Table IV: BPS Themes Identified**

<b>BPS Theme</b>	<b>Number who Identified this Theme</b>	<b>Percentage</b>
Weapons of War	44	34%
Why War?	23	19%
Children of War	26	21%
Other Response	32	26%
<b>Totals</b>	<b>125</b>	<b>100%</b>

One third of interviewees watched the 'Weapons of War' show, whilst only 19% recalled having viewed 'Why War?' Some visitors watched more than one show. In these instances, individuals were asked to recall the most memorable show in order to yield a result indicative of preference, thus providing a measure of their most memorable interpretation. The results confirm high interest in

this multi-media feature, thus supporting the hypothesis of the paper, that opinions on 'dark' issues are influenced by commentary, or 'live interpretation'.

Table V presents data on how much of the written information interviewees read during their visit.

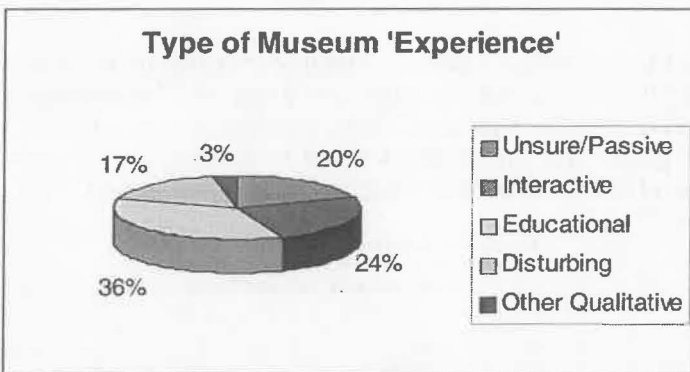
**Table V: Estimated Percentage of Written Information Read**

Percentage of Information Read	Number of Interviewees	Percentage of all Interviewees
0 - 25%	41	27%
25 - 50%	44	29%
50 - 75%	31	21%
75 - 100%	34	23%
<b>Totals</b>	<b>150</b>	<b>100%</b>

No significant majority is apparent, yet there is a slight bias towards interviewees who read around '25-50%' of written information. Further analysis reveals that the more visual information read by visitors, the more likely they were to leave the exhibition with thoughts on contemporary war events.

Visitors were asked to describe the museum 'experience' and the findings were subsequently grouped into typologies, as suggested by Wickens (2002: 834). Figure V presents these typologies as arranged through analysing the adjectives used to describe the 'experience'.

**Figure V: Visitor Perceptions of Experience Provided**



The graph in Figure V confirms that a majority of visitors realised the aims of the museum which were to encourage discussion, education and interactivity.

## Towards an Understanding of Visitor Perceptions of 'Dark' Attractions

Further analysis reveals what interviewees thought the museum was 'trying to show people (about)' and typologies are listed in Table VI, followed by Table VII which details data on visitors who were reminded of a contemporary war-related event.

**Table VI: Typologies of Interviewees – What the Museum Communicated**

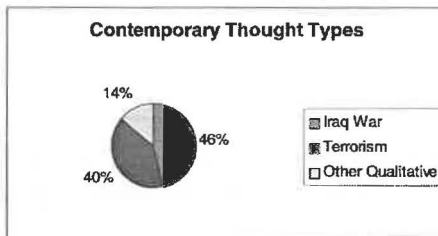
Perception of Museum 'Message'	Number Identifying this 'Message'	Percentage of Total
Uncertain / Passive	24	16%
'Human' Value Identified	55	37%
Historical Message	21	14%
Futility of War	39	26%
Other Qualitative	11	7%
<b>Totals</b>	<b>150</b>	<b>100%</b>

**Table VII: Number of Visitors Who Were Reminded of Contemporary War**

Contemporary Thought Confirmed	Count of Interviewees	Percentage of all Interviewees
Yes	112	75%
No	38	25%
<b>Totals</b>	<b>150</b>	<b>100%</b>

Figure VI presents typologies of visitor interpretation of the museum message. A majority of visitors who identified the 'human side' of war were reminded of a contemporary warfare issue. There are clearly only a limited number of contemporary war events which could be cited by interviewees, the most popular of which emerged as terrorism and the War in Iraq.

**Figure VI: Categories of Contemporary Thoughts**



The IWMN assert that they encourage discussion through the use of tours and 'sessions' during which people can handle objects and ask questions (IWM, 2002). Two data sets were produced to test this. The first was the ratio of people who asked staff for further information and this consisted of only 15% of interviewees. Only 10% of interviewees handled any of the objects in the museum, and 8% of these handled an 'uncovered' object, for example the tank (as opposed to handling an object during a scheduled 'handling session').

## Conclusions

The aim of the research was to shed light on the techniques used by the IWMN to influence visitor understanding of the museum context. The paper confirms the high level of interest in visitation and interpretation of sites associated with death, disaster, and warfare. Existing literature has assessed the difficulties involved in representing exhibits and information to the visiting public in an accurate, impartial light.

The IWMN is considered by some theorists to be a revolutionary heritage centre which views warfare not through the technology 'lens', but through the 'lens' of the social, or human impacts of war (Handley, 2002; Forrester and Walker, 2004). The museum manager interviewed during the early stages of the study described the museum as an interactive learning centre which tries to convey the 'human cost' of war. Visitors to the museum appear to realise, or appreciate this as they interpret the museum as an educational and interactive heritage centre which emphasises the social element of warfare. Typologies of visitors became apparent during the analysis of adjectives used by respondents to describe experiences and reflections of the museum empiricism. Essentially, these comprised interviewees who found (through qualitative analysis) the museum to be:

- interactive;
- educational;
- implicit of human suffering (including contemporary suffering, for example in Iraq);
- alluding to the futility of warfare since war is 'about people'.

As is the case with most primary research, several methodological limitations arose throughout the course of the study. Research was conducted only at a particular time of the year, only on visitors to the IWMN, and only on interviewees over the age of sixteen years. The findings identified five critical success factors employed within the museum. They can be considered 'critical' in the sense that they most influenced visitor interpretation within the research sample. These methods were effective in influencing visitor interpretation through:

- the use of multi-media;
- the use of displays;
- the use of interactive exhibits/displays;
- providing human commentary;
- capturing visitor imagination and attention.

The fact that few visitors made comments on the third and fourth categories suggests that either:

- the museum fails to provide an interactive experience; or (more likely),
- the primary research was conducted at a time when very few tours and handling sessions were only scheduled for a particular reason or reasons.

The subsequent visitor typologies identified justify the argument that media and commentary influence visitor interpretation within the 'dark' museum environment. A high percentage of interviewees identified that war 'is about people' and the museum is concerned with the social aspects of warfare, as the mission statement of the museum suggests.

The most significant finding from the research is the fact that a niche age-group may have been identified. The age group which most frequently identified the social costs of war (conveyed via the Museum's use of multi-media) has emerged as the 25-34 age group suggesting that thanatourism may have a particular niche, perhaps more influenced by, or attracted to related methods of representation.

Whitmarsh (2000) argues that the commemorative aspect of war museums directly affects their style of interpretation. This is quite apparent in the IWMN, where the primary attraction is considered to be the Big Picture Show. This state-of-the-art multi-media exhibit appeared to have the greatest effect on people, in terms of conveying the 'human cost' of war. The Time-line exhibit demonstrates the fact that the museum is both commemorative and contemporary in style. The murals and exhibits on recent war-related events around this feature seemed to impact significantly on the visitor's overall interpretation as so many identified in the research. Visitor interpretation can be considered a crucial factor in successful museum management in terms of maximising visitor retention capacity and motivating visitors to return.

The findings thus represent a useful pilot study of visitor interpretation and impacts on visitors in sites associated with 'dark' tourism. This paper has implicitly outlined the differences between what can be classified as a 'primary' or 'secondary' thanatouristic site. The IWMN is explicitly in the 'secondary' category, since it is a commemorative institution located away from any 'primary' war site. It would be of value (to the domain of visitor interpretation

of 'dark' attractions) to conduct similar research at a site where an atrocity or war-related event took place. For example it would be useful to carry out primary research in Auschwitz, or at Omaha Beach. It would also be of further interest to analyse the reactions of visitors to a primary 'dark' site, where the exhibits are perhaps of a more sensitive and/or controversial nature.

The IWMN was created in order to give audiences in the North of England access to the national collections. The focal point of the museum is to convey the message that 'war shapes lives'. The findings from this research confirm that the visitors interpret the museum context in this way, and that the exhibits and multi-media used in the museum are well received in achieving this aim. The findings also confirm the mission statement in showing that people are 'encouraged to understand contemporary issues relating to war'.

The IWMN can be considered a successful and innovative museum, combining architecture with modern exhibition techniques in order to convey a 'social' message to visitors. It is an important addition to the Imperial War Museums in the UK and it widens public access to the collections. This paper confirms a level of interest in the museum, and also confirms the mission of the museum, 'to stimulate interest in conflict and its impact on society'.

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**Professor John Lennon** is the holder of the Moffat Chair and is Director of the Moffat Centre for Travel and Tourism Business Development, providing leadership in relation to the Centre's research and consultancy activities. His research interests include: Dark Tourism; benchmarking and best practice; national tourism organisation and operation; heritage and visitor attractions; and, measuring the impact of tourism events and activities.

# International Conference on Critical Tourism Studies

30 June - 3 July 2005  
Dubrovnik, Croatia

## Embodying Tourism Research: Advancing Critical Approaches

This international conference will foreground the critical school of thought developing in tourism studies and create opportunities for interpretative and critical modes of tourism inquiry. The conference will take place at the Excelsior Hotel [www.hotel-excelsior.hr](http://www.hotel-excelsior.hr) in Dubrovnik, organised in collaboration between the New Zealand Tourism Research Institute (Auckland University of Technology), the Welsh Centre for Tourism Research (University of Wales Institute, Cardiff) and the Institute for Tourism, Zagreb.

## Keynote Speakers

Margaret Swain, University of California, Davis, USA  
Derek Hall, Scottish Agricultural College, UK  
Cara Aitchison, University of West England, UK  
John Tribe, University of Surrey, UK

Recent discourses in tourism have begun to emphasis the diversity of tourism experiences and processes. Despite this, the conceptual power of gender, race, sexuality and embodiment is underserved by the tourism academy. The Gender Researchers in Tourism Studies (GRITS) network was formed in 2003 in order to promote visibility and inclusivity of all researchers interested in exploring the interplay between tourism, identities, genders, races, sexualities and embodiment. This conference represents a major strengthening of the network's profile and aims to elevate the legitimacy of the critical school of thought developing in tourism studies.

## Conference aims:

- To foreground 'the situated body' in tourism research.
- To promote interpretative and critical approaches to tourism inquiry, with particular emphasis on 'the situated researcher'.
- To provide a multidisciplinary forum for researchers and to profile current research in the field.
- To facilitate further opportunities for research collaboration and for the mentoring of emerging researchers in tourism.

**Call for papers:**

We would like to encourage papers relating to all aspects of gender, sexuality, race, identity and embodiment as applied to the broad tourism context. We welcome contributions that demonstrate innovative theoretical and methodological approaches. Key themes include:

- Performing and constructing identities
- Experiencing tourism
- Constructing and consuming tourism spaces
- Materiality, lifestyle & cultural practices
- Representation, language and culture
- Masculinity, femininity and the family
- Employment practice, experience and entrepreneurship
- Epistemological, theoretical and methodological advances

All abstracts should be written in English and must be not more than 300 words in length. All submissions will be subject to a double-blind review and published in the refereed conference proceedings. Following the conference, the authors of selected papers will be invited to submit in a special issue of a leading tourism journal.

Abstracts should be e-mailed to either Dr Irena Ateljevic [Irena.ateljevic@aut.ac.nz](mailto:Irena.ateljevic@aut.ac.nz) or to Dr Nigel Morgan [nmorgan@uwic.ac.uk](mailto:nmorgan@uwic.ac.uk) and must include, title, author(s), affiliations, and a summary of the research aims, approach and key arguments/findings.

**Key dates for submission**

Abstracts: Friday 21th January 2005 (notification by 15th of February)  
Full papers (max 5,000 words) and working papers (max 2,000 words) for conference proceedings: Monday, May 2nd 2005

**Accommodation range**

Hotel Exclesior (5\*; the conference venue)

Single room with sea view •158

Double room with sea view •218

Hotel Lero (3\*; 15 min walk from the venue)

Single room with breakfast • 71

Double room with breakfast •92 (•46 per person)

### Conference fee

The price for the full conference package is •490 and includes 3 days participation, conference documentation, coffee breaks and lunches during the conference, welcome reception on Thursday night, concert on Friday night and gala dinner on Saturday night. This fee does not include accommodation.

### Conference convenors:

Drs Irena Ateljevic & Candice Harris  
Irena.ateljevic@aut.ac.nz & Candice.harris@aut.ac.nz

Drs Nigel Morgan & Annette Pritchard  
nmorgan@uwic.ac.uk & apritchard@uwic.ac.uk

For further information and updates please see [www.tri.org.nz](http://www.tri.org.nz)

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# INTERNATIONAL SUSTAINABILITY CONFERENCE

October 13-14, 2005

## Conference Organizers

The conference is organized by the University OAS North Western Switzerland, Institute for Sustainable Management in association with the University of Basle, Program MGU.

## Conference Chairmen

Prof Dr. Claus-Heinrich Daub, IfSM

Prof Dr. Paul Burger, University of Basel

## Workgroups

The workgroups The workgroups listed below will be carried out in the explorative workgroup style. They will consist of 4-6 speaker presentations (max. 10 minutes), the rest of the time will be devoted to in-depth discussion and follow-up planning. Total duration of a workshop will be 1.5 hours.

### Workgroup 1

*Topic* The role of good governance in promoting and implementing sustainable development.

### *Possible topics*

- Division of responsibility/tasks between nations, state, private sector and civil society regarding the promotion and implementation of sustainable development
- Obligation of the national states to put into action the decisions taken at Rio - state of the art
- On global level: Duties of the global economy to contribute to sustainable development
- Significance of sustainability on the political agendas of industrial and developing countries/countries in transition as well as their respective, potentially differing interests regarding sustainability
- Contributions of organizations /the private sector / NGOs to good governance on national and international levels
- Good governance "within" organizations

## INTERNATIONAL SUSTAINABILITY CONFERENCE

- Chances, limits and dangers of the participation by all stakeholders (as one of the main aspects of good governance) for the promotion of sustainability
- Examples of best practices

### **Workgroup 2**

*Topic* Exploring the “Social Dimension” of Sustainable Development

*Possible topics*

- What is the relation between Human Rights and sustainable development?
- How can we deal with conflicts between social, economical and ecological goods?
- Responsibilities in the field of preserving Human Rights in the context of globalization: duty of the state, the private sector, and international organizations? Respective possibilities and limits.
- Cultural diversity
- Ways of combining ethical and economic interests
- Danger of mainstreaming cultural standards through the concept of sustainability
- Threats of violent conflicts, resulting from violation of human rights, on the promotion and implementation of sustainability

### **Workgroup 3**

*Topic* Managing Strategic Decisions under Uncertainty

*Possible topics*

- Scenario analysis: what can it do for decision making?
- Participation: In what fields should it be done and what is its potential?
- How can a project be assessed as sustainable?
- How can we assess future developments?
- Pre-requisites for future national and business sustainability strategies.

### **Workgroup 4**

*Topic* Public goods, sustainability, and value creation - an irresolvable conflict?

*Possible topics*

- Sustainable management vs. value creation; conflict of interests or common goals?

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- Financial, social and ecological performance, is it possible to be successful in all three dimensions at once?
- Are “sustainable” enterprises also “good” enterprises?
- The Dow Jones Sustainability Index has been outperforming the traditional Dow Jones Indexes for quite some time now. Have there been serious efforts made, to find any reasonable explanation for this phenomenon, yet?
- The complexity, possibilities & (dis)advantages of expressing/integrating ecological and social performance in Added Value.

### Workgroup 5

*Topic* Civil Society - the powerful link between the state and the individual

*Possible topics*

- Collaboration between the civil society and international organizations/companies in implementing sustainability
- Division of power/work between state, private sector and civil society regarding the promotion of sustainability - achievements and main problems
- Role, possibilities and limits of/for the civil society/NGOs/NPOs/indigenous peoples to contribute to the promotion and implementation of sustainable development (at local, national and international levels)
- Possibilities for the civil society to influence both state and private sector regarding the implementation of sustainable development
- Local Agendas 21: Chances and limits of the “bottom-up”-approach
- Border between private sector and civil society regarding the issue of sustainable development -common interests, divergences and main problems
- The importance of empowering civil society in developing countries/countries in transition in order to implement sustainable development

### Workgroup 6

*Topic* Sustainability - old wine in new bottles? A critical review

*Possible topics*

- Sustainability, nothing but just a paper tiger?
- A one size fits all principle. Are we loosing focus?
- Do we need a single all encompassing definition or is its actual openness the adequate form?

## INTERNATIONAL SUSTAINABILITY CONFERENCE

- Are there some elements, which are necessary in order to characterize a development as sustainable”
- How should the normative character of the idea become interpreted?

### **Workgroup 7**

Topic Business Ethics, CC & CSR

*Possible topics*

- Attempts to prove direct/ indirect effects of CSR on economic performance.
- Corporate Stakeholder Responsibility - the new definition of CSR.
- Socio-efficiency- a matter of creative accounting?
- What's hot, what's not? Updates and new challenges in social auditing.
- CSR- Strategies-, deepening or weakening the cultural diversity of regions and nations?
- Does CSR and/or CC create Trust?

### **Workgroup 8**

*Topic Sustainable Management - the spine of an organization. Practical Implications of Integrating Sustainable Development*

*Possible topics*

- Programmes, procedures, and tools used to put the sustainable commitments and objectives (economical, ecological & social) into practice.
- The challenges of implementing social- and ecological risk management into the company structure.
- To which extent can organizations solve the need for transparency? Practical examples.
- Case studies that solve the problems which occur when a harmonization of the Agenda 21-integrated-political- strategies with company strategies become a serious threat to the company.
- Practical examples for creating Competitive Advantage through stakeholder dialogue. Discussing the possibilities and necessities of such an approach.
- The ethical limitations to “unethical” businesses. Attempts to overcome the catch-22 situation.



**Workgroup 9**

*Topic* Life-cycle Management

*Possible topics*

- Defining and interpreting social and ecological impacts
- Pre-requisites for product and service life-cycle management
- Endorsement of national/international law and regulations
- Product Stewardship, the read-thread through life cycle management
- Implications and opportunities of changing from traditional Supply Chain Management/ Total Quality Management into life-cycle management
- **Compatibility with DIN ISO 9001/14001 ff., EMAS and other management systems**
- Additional/complementary approaches for filling up the theoretical gaps
- At what point does the company's ethical responsibility for its products and/or services end?

**Workgroup 10**

*Topic* Sustainability Communication

*Possible topics*

- Effectiveness / efficiency of **Corporate Sustainability Reporting in informing stakeholders.**
- One-way or two-way communication?
- Contra productive? Compatibility of different guidelines and indicators for Corporate Sustainability Reporting (GRI, Global Compact, OECD etc.).
- Increasing the Return on Stakeholder through Corporate Sustainability Communication tools?
- Sustainability Communication as a commitment to Sustainable Development.
- Limitations/Trade-offs to communication tools
- Cultural differences: to what degree is sustainability communication homogenous/ heterogeneous?
- Different frameworks for internal and external communication (level of interplay/harmonization).
- IT-supported communication, shortening or widening the distance between sender and receiver?

## INTERNATIONAL SUSTAINABILITY CONFERENCE

### **Workgroup 11**

#### *Topic Sustainability Marketing or Sustainable Marketing?*

##### *Possible topics*

- Green washing or soul washing?
- Regulations and Norms, a political framework
- Branding - Level of standardization needed/wanted
- Services / Products different marketing approaches
- Sustainable Consumption patterns
- Rethinking the market analysis

### **Workgroup 12**

#### *Topic Sustainability and Education*

##### *Possible topics*

- Educating the public: means and measures.
- Sustainability as an integral part of education.
- “Life-cycle thinking” from the cradle to the grave. Integrating sustainability in all stages of life.
- Drastically changing expectations in a globalising society; a call for a new teaching methodology? Considerations, challenges & concepts on a national & international level.
- How can the concept of sustainability be taught and propagated? (Practical tools, media, etc.)

#### **Important dates**

- April 30, 2005 deadline for abstracts
- June 30, 2005 notification of accepted abstracts
- July 31, 2005 early registration
- August 31, 2005 announcement final programme
- October 13./14. ISC2005

#### **Conference Secretariat**

- Yvonne Scherrer, MA University of Basel, MGU, Vesalgasse 1, CH-4051 Basel E-mail: [isc2005@unibas.ch](mailto:isc2005@unibas.ch) <http://www.isc2005.ch>



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**Volume 3, No. 1, 2005**

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- 2. Dr. Prof. Roessingh, Myrte Berende, M. Berendse, The Netherlands**  
Combining sustainable tourism and cruise-ships in Belize.
- 3. Prof. Brian King, Australia, Yu Shaohua, China, Cam Hong Tang, Australia**  
The Implemetation of China's 'Golden Weeks Holiday' policy: A preliminary Assessment.
- 4. Dr. Razaq Raj, UK**  
The Fear of Long-term Planning in Small Hospitality and Retail Business

*More to be added*

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### Periodicals / Journals

Palmer, A., & Bejou, D. (1995). Tourism Destination marketing alliances. *Annals of Tourism Research*, 22(3), 616-629.

### Books

Porter, M. (1980). *Competitive strategy: Techniques for analysing industries and Competitors*. New York: Free Press.

### Chapters in Edited Book

Walton, M. and Wilcox, L. A. R. (1996). Role of Women in Travel and Tourism. In R. Shah, M. Polen, and G. Mars (Eds.), *VPR's Encyclopedia of Hospitality and Tourism* (pp. 798-810). New York: Van Nostrand Reinhold.

### Internet

Jacobson, J. W., Mulick, J. A., & Schwartz, A. A. (1995). A history of facilitated communication : Science, pseudoscience, and antiscience : Science working group on facilitated communication. *American Psychologist*, 50, 750-765. Retrieved January 25, 1996 from the World Wide Web : <http://www.apa.org/journals/jacobson.html>

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Responses to the articles should be 500-1000 words, book reviews and new pieces 250-500 words. Notices of forthcoming meetings for listing in the calendar section are welcomed. Entries must be received at least six months before the date of event.

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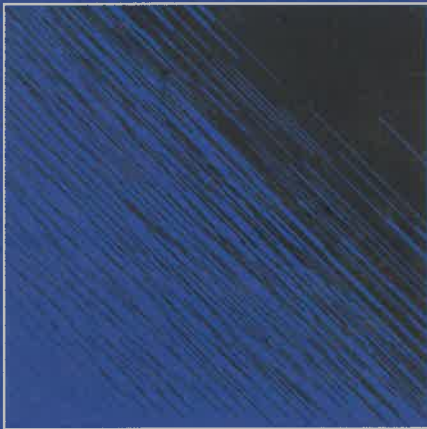




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ISSN : 0972-7787

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