newhorizons

international benchmarking and best practice for visitor attractions

contents

1 | introduction

In 1997, Scottish Enterprise, in partnership with Highlands and Islands Enterprise and Scottish Tourist Board, published the findings of a review of Scotland's visitor attractions, which considered their current performance and the role of the public sector in supporting their development.

The Scottish Visitor Attraction review highlighted a number of issues which were particularly significant for the sector. The effects of seasonality, the need to generate repeat visits, and the importance of regularly revitalising the product, were all raised as areas of concern. The extent to which many Scottish visitor attractions were dependent on the local resident population for visitors was also highlighted.

The Review suggested that visitor attractions must continually evolve to remain competitive and to meet the challenges of changing tourism markets. Visitors to Scotland were becoming more sophisticated, and would, increasingly, compare what Scotland had to offer with the best in other destinations around the world. It was vital, therefore, that the tourism industry in Scotland was aware of what was happening globally and was quick to respond to new ideas and opportunities.

It was with this need in mind that Scottish Enterprise commissioned the Scottish Tourism Research Unit at Strathclyde University to look at the performance of visitor attractions in a number of other tourism destinations, and to identify international best practice in the area of visitor attractions development and management. Its primary purpose is to provide those involved in visitor attractions in Scotland, both in the public and private sectors, with information on recent innovations and developments in management practices.

A total of ten countries were considered. Six of these countries were selected on the basis that they have a similar product to Scotland in terms of visitor attractions, climate and geography. These were: Ireland, Finland, Norway, Denmark, Netherlands and Germany.

A further four countries were selected because they were believed to be 'leading-edge' destinations in terms of international tourism development. These were France as one of Europe's top destinations; Canada because of its longstanding tourism administration; Singapore as one of the world's fastest growing urban destinations and the USA as it has led the world in many aspects of visitor attractions development and management.

The research firstly involved taking an overview of the visitor attraction product in each country looking at issues such as overall levels of provision, performance levels, and the role of the public sector. Then a range of individual attractions was assessed against a series of critical success factors. These were based around key issues which had emerged in the course of the Scottish Visitor Attraction Review. They were issues which were felt to be particularly important for the successful development and management of visitor attractions in Scotland. The objective was to identify international best practice which could be used to enhance the performance of Scottish attractions in these areas.

Whilst the list of critical success factors is not intended to be exhaustive, it does provide a consistent framework against which to assess what is a wide range of visitor attractions in terms of country, location, type and size.

This report presents the findings of the research in the form of a working reference document.

The intention is that it should provide those involved in visitor attractions development and management with practical ideas, based on experience in visitor attractions elsewhere, to improve performance in areas that are considered to be critical to long term success.

The report is set out as follows:

section 1 | an international perspective

The first section provides an overview of each country setting its visitor attraction product in the context of its geography and tourism industry in general. Each country is considered under a number of headings to reflect the volume and main features of visitor attractions, public ownership and market characteristics at a national level.

section 2 | critical success factors in visitor attraction management

The second section outlines the key findings in terms of each of the individual critical success factors. The findings are illustrated in each case by way of a series of case studies from individual attractions that have been successful in that particular area of activity.

section 3 | visitor attractions at a glance

The final section presents a broader overview of each of the individual visitor attractions which were looked at showing aspects of their operations which represent best practice.

2 | an international perspective

The original intention of this study was to present information which clearly outlined and compared key data on visitor attractions for each country. During the course of the research it became apparent that this would not be possible due to the fact that none of the countries, with the exception of Ireland, kept the kind of comprehensive quantitative data on visitor attractions which is available in Scotland.

In addition, the research showed that the key method for benchmarking should be through qualitative comparisons of management practices in successful attractions, rather than keeping league tables on visitor attractions for each country at a national level.

Under these circumstances, the information has been presented in such a way as to give a qualitative overview of each country augmented, where possible, with quantitative data. To give some consistency, each country is considered under the following headings:

- **Main observations**
- **Population of country and geography**
- **Estimated number of visitor attractions**
- **Private and public ownership**
- **Main features of visitor attractions**
- **Market characteristics**

ireland

Main observations

Ireland is the outstanding example of how visitor attraction development may be led by the public sector within a tourism strategy which targets particular locations and products as part of a national tourism development policy.

None of the visitor attractions in themselves are particularly innovative.

Ireland presents culture and heritage in a contemporary way. The visitor attractions tend to be well-executed examples of standard cultural attractions such as museums and art galleries.

Population and geography

Ireland has a population of 3.2 million and is dominated by Dublin in terms of population and economic significance. The country covers an area of 68,890 square kilometres and has a population density of 52 people per square kilometre.

Estimated number of attractions

Ireland has 397 visitor attractions, of which 279 are fee-paying visitor attractions and 118 are free. 181 or 70% of the fee paying attractions have been developed since 1984, a rate of growth not matched by any other country in this study. 104 new visitor attractions, 40% of the total, have been developed since 1989.

Private and public ownership

Visitor attractions development in Ireland has been driven by strong government planning, allied to structural funding from the European Commission. Development has been implemented through the Operational Programme for Tourism. The main aim of the Operational Programme was to increase the competitiveness of the Irish tourism industry by concentrating on improvements in the quality of the product. Investment in the physical product has also been matched by investment in quality of service and marketing. Funding has been allocated to visitor attractions of a scale and nature which conform to the country's national tourism objectives. It is also interesting to note that a significant amount of expenditure has been devoted to projects with a cultural and historic theme making them an integral part of Irish tourism. It is estimated that some IR£450 million has been invested in tourist facilities, training and marketing in Ireland from 1989 - 1993.

Main features of visitor attractions

In the late 1980s and early 1990s, there was a meteoric growth in visitor attractions in Ireland, most of them fee-paying, which was fuelled by subsidies from the European Commission. Ireland's prime visitor attraction sector in 1993 was historic houses and castles which accounted for about 35% of all visits. Over 80% of the visitor attractions provide craft or bookshop facilities with approximately 60% providing food and beverage on site.

A number of free attractions have been developed or improved such as the National Museum and Art Gallery. This investment in visitor attractions using EC grants allocated within a national tourism strategy has been successful in increasing visitors numbers and may be seen as a main motivation for visiting Ireland. Research has shown that 60% of all visitors in 1995 said that a visitor attraction was very important or quite important in the decision to visit the country. The question that now exists is whether these high levels of growth will be maintained as EC funds diminish in the future.

Market characteristics

Between 1991 and 1993 there was a 50% increase in visitor numbers to attractions. A major study on visitor attractions carried out in 1995 by Tourism Development International Ltd showed that 8,634,243 trips were made to Irish visitor attractions. The composition of the visitors can be broken down into domestic 27%; Northern Ireland 5% and overseas 68%, demonstrating a very high proportion of international to domestic visitors.

The overseas market comprised of: 37% from Europe, 14% from N. America and 12% from Britain. The vast majority of visitor attractions received modest attendance figures.

% of Visitor Attractions	No of Visitors
5	150,000+
4	100-150,000
10	50-100,000
31	10-50,000
50	Up to 10,000

finland

Main observations

Finland cleverly promotes an image of remoteness, wilderness and exclusivity to target niche markets seeking natural environmental attractions.

It provides some excellent examples of how natural resources can be developed using a three-pronged approach, if sensitively managed, combining resource extraction; cultural preservation and visitor attraction.

Finland also offers some good examples of how visitor attraction clusters can create the synergy to build stable visitor growth in remote locations.

Population and geographical characteristics

Finland is the seventh largest country in Europe with a surface area of 338,000 sq. km and a population of 5.1 million. The country has a population density of only 15.1 per sq. km.

Finland's main assets are its natural resources which are becoming increasingly attractive to the independent, adventure traveller. Eastern and central Finland are covered with extensive forests and include some 187,000 lakes. More than ever, Finland cultivates an image of a clean, safe environment.

Estimated number of attractions

The Finnish Tourist Board has been monitoring visitor numbers to visitor attractions since 1985 and the statistics include both all-year-round sites and visitor attractions which are only open during summer months. The survey database includes 338 attractions which omits a large number of smaller attractions, in particular museums, of which there are estimated to be around 800 in Finland.

Visitor attractions are divided into 9 categories:

1. Family and Hobby-Related Attractions
2. Animal Parks
3. Leisure Centres and Events
4. Science and Educational Attractions
5. Roadside Tourist Service Centres and Shops
6. Exhibitions
7. Buildings
8. Museums & Castles
9. Monasteries, Convents and Churches

Private and public ownership

Although visitor attractions were not broken down into public, private and voluntary sectors, expert opinion indicated that almost all museums were under public ownership. Other privately run attractions received some degree of funding from local municipalities.

Almost all of the larger museums charge an entrance fee, albeit with subsidised pricing for children and educational groups.

The visitor attraction sector in Finland does not have any overall organisational network: any groupings are for specific sectors such as the national board of museums. Many amusement parks belong to the one foundation, The Mannerheim Foundation, where a loose co-operation exists for marketing. Most joint marketing is organised through the regional tourist boards. Links to other tourist sectors tend to be restricted to small promotional initiatives such as the Helsinki Card which promotes public transport and a variety of visitor attractions as well as other tourist services.

Main features of visitor attractions

Amusement parks, zoos and churches are the most popular visitor attractions in Finland. It should be noted that this does not include natural environmental attractions which are generally free. On average, museums and exhibitions attract the lowest numbers of visitors.

The 1996 figures covered 25.6 million visitors and the overall trend was slightly higher than the previous year. The attraction sector is viewed as stable at present having gone through a difficult period in a national recession in the early 1990s. This recession followed a period of large scale investment in tourism and many businesses, particularly in the accommodation sector, went bankrupt. The Finnish Tourist Board believe that they have enough visitor attractions and there is no need for any more large scale investment in new visitor attractions.

Market characteristics

Only 10% of visitors to attractions come from outwith Finland, although attempts are being made to attract more foreign visitors. The key international markets are Germany and other Nordic countries, although Finland is being actively promoted as a gateway to Europe and a nature tourism destination for Japanese and Russian visitors.

norway

Main observations

Natural environmental attractions, such as national parks, may not generate direct income from visitors but their careful management and protection means that they will provide benefits to local economies in Norway.

Norway shows how remote attractions can be promoted successfully in peripheral areas.

Sporting activity attractions, when combined with major events, such as the 1994 Winter Olympics in Lillehammer, can generate long term changes in international perceptions of a country and leave a legacy of visitor attraction infrastructure for the benefit of the local economy.

Population and geographical characteristics

Like Finland, Norway is a sparsely populated country with nearly one third lying above the Arctic Circle. The country has a population of 4.3 million; covers an area of 323,800 sq. km and has a population density of 13.4 per sq. km.

Norway's major attraction is it's dramatic scenery. The indented coastline on the western shore forms a spectacular series of islands and fjords and the remote, uninhabited regions of the north combine to provide some of the best natural attractions in Europe.

Estimated number of attractions

Data on visitor attractions in Norway is not gathered systematically by the tourism authorities and there is no measure of the total number of visitor attractions. Therefore, comparisons with the resident population and number of tourists are not possible. However a government-funded survey of visitors to a representative sample of visitor attractions has recently been completed by a research institute in Oslo.

The statistics available from NORTRA, the Norwegian Tourist Board, are based on ad hoc surveys of the top twenty five 'most important' attractions in 1996 and 1997 and the top one hundred in 1994 and 1995. However, only visitor attractions which charge admission fees or have systematic counting of visitors are included. Therefore major international attractions such as the Vigeland Sculpture Park in Oslo, which attracts an estimated 1 million visitors per annum, are excluded from the figures. As an indication of visitor volume in Norway, the top five attractions which are involved in these surveys, attract between 300,000 and 650,000 visitors each year.

Private and public ownership

Ownership of visitor attractions in Norway is mixed with national museums being wholly in the public domain and local or regional museums having a mix of public and private control. Natural attractions, including nature visitor centres, tend to be in National Parks, owned by the state, which cover approximately one third of Norway.

There are four Glacier centres which are currently viewed as being successful, although there is concern that the initial heavy investment by the public sector may not be sustainable in terms of the centres' future operations as the lack of repeat visitation is proving to be an issue.

Levels of public subsidy for visitor attractions in Norway remain relatively high, in particular for ones which serve an educational or conservation role. Subsidies have also been provided for visitor attractions in peripheral areas such as North Cape. Most museums now have entrance charges, albeit nominal for children. Natural attractions are showing signs of attempts to increase visitor spend by providing interpretation centres, which charge entrance fees, as well as providing catering and retail facilities.

Main features of the visitor attractions

Long viewed as expensive, remote and appealing to more affluent visitors, Norway is starting to attract tourists of varying income levels and interests. This can partly be attributed to the country's world-wide exposure during the 1994 Lillehammer Winter Olympics. The Games promoted Norway as a country of great natural beauty with wide open spaces, friendly people and strong traditions. As a result of this, Norway is beginning to attract more 'ecotourists'; visitors jaded with the more developed, commercialised tourist destinations.

Market characteristics

The market remains predominantly domestic, in particular for theme park attractions.
The key overseas markets can be broken down to Sweden, as an important source for short breaks; Switzerland, Germany and Austria for camping breaks and touring wilderness areas; and Denmark. In general, the duration of the visitor's stay will be directly related to the distance which has been travelled to get to Norway.

denmark

Main observations

There has been a rapid expansion in the number of visitor attractions in Denmark. Although it is too early to be certain, some of the evidence suggests over-supply, which is acting to the detriment of the longer standing attractions.

Denmark offers a good example of the gradual introduction of charges at public museums, with little adverse public reaction and improvements in revenue.

Denmark has similar geographic characteristics and visitor attraction density to Scotland. The country also provides a good example of how it has developed natural environmental attractions alongside the promotion of Denmark as a clean, activity holiday and outdoor tourism destination.

Population and geographical characteristics

Denmark has a population similar to Scotland, about 5.2 million, but is only around half the area at 43,000 sq. km. It is the most densely populated of the Scandinavian countries at 121 people per sq. km. Denmark's selling points include extensive infrastructure geared to active, family holidays and its many beaches along the 7,000 km of coastline. It also relies on its clean image to attract the growing number of environmentally conscious tourists. It does not have the spectacular scenery of the more northerly Scandinavian countries, but does offer ideal cycling and rambling holidays with an extensive network of tracks in a landscape which is even flatter than that of Holland.

Estimated number of attractions

The Danish Tourist Board (DTB) gathers data on the main visitor attractions with entrance charges. This amounts to:

- around 100 attractions with over 50,000 visitors a year
- around 200 attractions with over 20,000 visitors a year

Although visitor attractions with less than 20,000 visitors a year are not recorded, the DTB estimate that there are around 500 attractions in Denmark, which collectively generate a total of 30 million visits a year.

The range of visitor attractions includes:

Art museums	75
Museums of cultural history	181
Zoos and wildlife parks	58
Amusement parks	41
Aqua domes	8
Golf courses	118
Castles and country houses open to the public	81

The country also offers 1,800 sq. km of conservation areas and 3,000 km of national cycling routes.

The DTB believe that there is as a problem of over-provision of visitor attractions and plan to undertake an investigation into the characteristics of the whole sector, looking at demand - supply match; geographical distribution; visitor characteristics; gaps in the market; and connections between attractions and basic tourism demand. Although the DTB suspect there is already an oversupply, there are currently proposals to establish 50 new developments.

Private and public ownership

The DTB state that most attractions are partly funded by government, central or municipal, with 80% of the top one hundred being entirely in the public sector. Most attractions receive funding from the municipalities for feasibility studies and to cover the running cost deficits in the first few years.

There is no direct equivalent of the National Trust for Scotland in Denmark and the DTB are envious of the UK in this respect. They find it difficult to establish a dialogue with landowners and owners of historic buildings. The natural environment is not viewed as an important attraction in Denmark, where there are no true natural areas left and therefore no National Parks. Any quasi-natural areas remaining tend to be owned by the state where there is interpretation at environmental centres but no entrance charges.

Entrance fees have been introduced to the majority of museums. This followed a debate, similar to that currently being undertaken in Scotland, on the ethics and economics of entrance charges. The decision to proceed has not seen an initial decline in visitors, in fact there has been a moderate growth in visitors to museums overall. Entrance charges are kept relatively low and there are special concession rates available depending on the time of year and location of the museum. The DTB do not feel these charges deter foreign tourists, used to paying entrance fees throughout Europe, and the concessions for children and free access at particular times seems to have placated local people.

Main features of visitor attractions

The main notable feature has been the recent expansion of visitor attractions funded by the government Labour Market Holiday Foundation. This funding, derived from holiday pay, amounting to about 12.5% of all employees' wages, was previously spent on the Danish hotel sector. Around 30 major new attractions were opened with assistance from this fund in the last 5 years, raising questions of unfair competition from existing private operators. This government money has amounted to an investment of approximately £44m on new visitor attractions in Denmark over the last 3 or 4 years.

Although the investment has been substantial, the 50 largest attractions in Denmark do not seem to have been affected in terms of visitor figures so far. In fact there has been an overall growth rate of 10 - 12% in total visitors to attractions in the last 5 to 6 years. However there is concern over whether visitors, having visited the new attractions once or twice, will make subsequent visits. There was no real strategy involving the DTB for the type and location of the 30 new attractions.

The Foundation, having strong trade union links, and with objectives to benefit the well-being of the Danish people tended to favour museums, Viking heritage centres, nature centres, wildlife parks, aquariums, and environmental centres. Changes in legislation mean that the Foundation, and this source of funds for visitor attractions, has ceased to exist. It is now very difficult to find funding for new attractions from the private sector and there seems to be almost no funding available from the EU. The DTB are currently undertaking more research into the effects of the Foundation investment on the Danish attractions sector in the long term. Current and future findings on this should provide some useful comparisons and lessons for Scotland.

Market characteristics

DTB studies show that most visitor attractions in Denmark are predominately visited by the Danes themselves 'who seem to have an insatiable appetite for visiting attractions' (DTB). Domestic visitation accounts for about 85-90% of visitors.

the netherlands

Main observations

The Netherlands is marked by the number and specialist diversity of its visitor attractions.

It provides some excellent examples of the use of incentives for multi-visits to attractions, particularly in Amsterdam.

Despite the density and number of attractions, little practical attention has been focused on displacement issues.

Population and geography of country

The Netherlands is half the size of Scotland at 37,000 sq. km. With a population of 15,500,000, the country's population density of 395.8 per sq km makes it the highest in Europe.

Estimated number of visitor attractions

Although the Netherland's national tourism organisation does not report on the total number of visitor attractions, it does have a recognised list of categories:

1 Industrial attractions
2 Zoos and zoological gardens
3 Historic buildings
4 Museums
5 Visitor centres
6 Recreation areas
7 Transport (includes canal and boat tours)

There is a national museums guide, 'Nederland Museumland Gids', which lists a total of 1,150 museums. The Netherland's definition of museums covers a wide range of traditional museums as well as other visitor attractions including history museums, art museums, historic house museums, zoos, botanical gardens, aquariums and planetariums. Based on this figure there are more museums per square metre than in any other country in the world. Amsterdam alone has 62 museums.

Private and public ownership

Museums are operated by the national government, local authorities, non profit groups and commercial groups. There is also a museums association, Nederlandse Museumvereniging, which represents over 400 of these museums.

Main features of visitor attractions

Museums in the Netherlands are very specialised, some being devoted to a single subject such as theatre, film, labour, taxation, cats, bibles, marijuana, sex and so on with others being dedicated to a single area of study such as ethnology or archaeology or to the work of a single artist such as Van Gogh. Most visitor attractions in the Netherlands are open all year round, with the exception of some outdoor sites such as parks and open air museums. All visitor attractions charge admission with some sites offering admission incentives. For example, visitors travelling by Amsterdam's Museum Boat can receive a reduced admission at participating museums.

Market characteristics

The top seven visitor attractions in the Netherlands all attract well in excess of one million visitors per annum.

There is no data indicating what proportion of these attendance figures were domestic or international. Between 1985 and 1995 the national tourism organisation reported a 140% increase in attendance to visitor attractions. The authors attribute this to new visitor attractions and events as well as an increased attendance at established sites. Much of this growth has been in the urban areas of the major tourist cities of Amsterdam, Rotterdam and the Hague. The report also notes the fact that the visitor share of these cities has risen from 25% of total visits to the Netherlands in 1985 to 31% in 1995.

germany

Main observations

Germany has little to offer Scotland as a model of attraction management since it is not a market leader or at the cutting edge in any category of visitor attraction operation.

Germany acts as an example of traditional funding by the public sector for its main visitor attractions, and little has been done to augment or diversify beyond this public sector framework.

Its main significance may be as a role model of traditional approaches to cultural attraction realisation, particularly in Berlin.

Population and geography of the country

Germany has a population of some 80 million. The western provinces have been heavily industrialised for more than a hundred years, with heavy concentrations of population in and around Hamburg, Munich, Frankfurt and the Ruhr. There are however many thriving medium-sized markets and university towns which have retained their vitality and something of their historical attractiveness. Key topographical assets for tourism in Germany are the Baltic coast, the Rhine valley, the Black Forest and the Bavarian mountains. The newly incorporated eastern provinces, like much of Eastern Europe, suffer from industrial pollution and urban dereliction, but have considerable potential for rural and cultural tourism development.

Estimated number of visitor attractions

German public organisations have little interest in gathering information about visitor attractions and no systematic analysis is carried out. There is no standard definition of what constitutes a visitor attraction and the only statistics available are those gathered by the heritage protection agencies of each of the sixteen individual Laender. These relate primarily to historic buildings and museums in the custodianship of each provincial government. The tourism marketing agency for Berlin was able to supply a full listing of visitor attractions, totalling 150, in the reunited city, but without any estimates for annual visitor numbers.

Private and public ownership

German governments have poured enormous resources into building up the national cultural infrastructure. Taking Berlin as an example, the leading visitor attractions are the national museums, for which the city has enjoyed a world-wide reputation since the early 1900s. The city does not appear to have any major visitor attractions which could be operated on a commercial basis. Since reunification, Berlin has been undergoing frenetic building programmes, now intensified by the decision to restore its former status as the capital of Germany. These factors are having a major impact on the museum and art galleries of the city as collections are reunited, new exhibitions are prepared and new, prestigious museum and art gallery buildings are commissioned.

Main features of visitor attractions

The lack of data on German attractions is particularly regrettable as Germany, or at least the western part of the country, can be considered to be the European Union member most like the UK in population structure and to some extent also in social taste favouring holidays abroad. Germany appears to be comparable to the UK in the rate of growth of shopping, multiplex cinema, family entertainment centres and so on, and also in the adoption of new leisure products. It is likely that on a regional basis Germany is as well or better supplied than Scotland. It has spectacular natural features, historic sites linked to significant European events or figures, individual heritage buildings, preserved historic townscapes and industrial heritage sites as well as museums and interpretive centres. Much of this provision appears to rest on a foundation of public subsidy.

Market characteristics

The main market for German attractions is domestic. In the absence of any quantified evidence, it may be unfair to conclude that Germany is not a market leader in any category of visitor attraction operation but this does seem a reasonable working hypothesis. It is an impression sustained by considering the relatively low level of effort which Germany deploys to attract international visitors to products beyond the well established Rhine cruising; Romantic Road exploring and shopping in exciting cities formulae. Although international visitors to Germany are significant, accounting for about 17% of visitors, it could be assumed that the cultural heritage of Germany is not a main motivating factor in bringing tourists to Germany, partly no doubt due to the language factor and partly due to the perceptions of Germany's role in twentieth century history. There is, therefore, perhaps less incentive than in other places to cater for the international visitor and to develop sophisticated interpretive techniques to appeal to an international clientele.

france

Main observations

France has a high level of public sector intervention at all levels of tourism. The visitor attractions which were visited have been funded by regional or state government and public sector intervention has been particularly important for major new attractions in areas of strategic importance, as well as those with low tourist volumes, such as such as Boulogne, Caen & Poitiers.

France has shown a readiness to invest in new 'super-attractions'. These are often associated with innovative use of architecture and design to reinforce novelty in existing sites.

French tourism exemplifies widespread promotional partnerships and attractions' associations.

The most successful French attractions demonstrate excellent marketing to groups and prime markets.

Population of country and geography

France has a population of 56 million and an area of 547,000 square miles. Its urban population is 74% compared with the UK's at 91.7%. The population density is 102 per square km. The sample regions selected were primarily Normandy, Picardy and Artois because these northern areas are closest to Scotland in character and have a good representation of significant visitor attractions.

Estimated number of attractions

France's visitor attractions consist of 40,000 monuments, 4000 'prestigious' sites and 4000 museums.

Private and public ownership

The strength of France as a tourism destination is its diversity of attractions which are partly based on unique features relating to its climate, landscape and heritage. However, the French have added to the advantages given to them by nature and geography, through a highly sophisticated national and regional approach to tourism development involving systematic planning; the promotion of public and private sector partnerships; and regional networking.

The unique French mixture of flair and bureaucratic organisation has resulted in a visitor attractions environment in which high risk, innovative projects are supported by public sector departments.

All the newer, successful attractions which were appraised, with the exception of the marine attraction Nausicaa at Boulogne, were publicly funded by state or regional government. This often causes irritation with small independent attractions' managers because they feel they cannot compete with the funding given to public projects. The French are much more supportive of public spending; they pay a high price for it, but they also get a very high standard of welfare provision. This national tendency has to be understood to see why regional councils can launch a project like Futuroscope without being criticised by rate payers.

The public sector in France also gives high priority to the fact that a flagship visitor attraction may have a larger economic regenerative force than tourism alone. Good examples of this would be Nausicaa at Boulogne; Futuroscope at Poitiers; and Memorial at Caen.

Main features of visitor attractions

In general, France's leading attractions are among the best in the world, whether collection-based traditional ones such as the Louvre, or the newer image-based attractions like Futuroscope and Memorial. These cutting edge attractions tend to be in large, urban areas.

In the countryside there are a great number of small, traditional visitor attractions, such as local museums and monuments, which have been around substantially unchanged for years. Such visitor attractions are often partly staffed by volunteers; have low visitor numbers and close out of season.

The French state issues a guide, through its national tourism agency, for people wishing to operate in the tourism attraction area. This guide divides attraction development into 7 types: caves and caverns; villages of character; gardens; zoos and botanical parks; rural museums; river tourism; railway tourism. It includes data on the market profile of visitors to the particular kinds of visitor attraction.

Market characteristics

France's prime market is domestic since the local market supplies most of the visitors out of season, plus approximately 80% of the French take their holidays within France. In northern France the importance of the English market has clearly influenced attraction development, particularly with the range of World War I and II developments. France places great emphasis on the schools and educational market as well as the pensioner market. These groups have a vital role as they ensure a steady supply of visitors outwith the main tourist season.

In short, French visitor attraction development is based on the notion that attraction appeal, like charity, must begin at home, which means that domestic catchment populations and driving distance are the start point even in the evolution of new large scale attractions with international potential.

canada

Main observations

Canada offers little in the way of new ideas for Scottish visitor attraction development because it displays many of the same characteristics.

Specifically:

Canada's main visitor attraction product is its natural heritage.

Many of the visitor attractions rely on public sector funding but are increasingly having to balance their budgets with revenue generating activities.

Special exhibitions and events are used to attract visitors and to encourage repeat visits.

There is a trend towards packaging and partnerships whereby a number of visitor attractions and service elements are presented to the consumer as one product.

Many visitor attractions do not charge admission, however, their activities contribute to the facilities available for tourists and to the creation of tourist destinations.

Population of country and geography

Canada has a population of 28.8 million in a country with an area of 9,221 square km. It has a population density of 2.9 people per sq. km which is one of the lowest in the developed world. Only two of its cities, Montreal and Toronto, have populations over 2 million.

Estimated number of visitor attractions

A 1995 Canadian survey defined visitor attractions as:
'Tourist attractions are places, events and events in places'

This survey had a total of 2,708 establishments participating. Of these the majority, totalling 2,032, were heritage establishments which are primarily engaged in preserving and exhibiting objects, sites and natural wonders of historical, cultural and educational value. The remainder were recreational, amusements, industrial, commercial and other attractions. Just over half were located in urban areas.

Market characteristics

There are no visitor attraction figures recorded at a national level in Canada.

Private and public ownership

Approximately 50% of Canada's visitor attractions are public institutions, which covers municipal, provincial and federal sites with the remainder being privately owned.

Main features of visitor attractions

More than half of the visitor attractions charge admission, with an all inclusive admission fee being the most common fee structure. There is a trend towards networking, partnering and packaging of visitor attractions as reflected by the recent regional roundtable discussions on Cultural and Heritage Tourism, organised by the Canadian Tourism Commission. These discussions brought together representatives of cultural and heritage attractions and of the tourism industry. The province of Nova Scotia has also recently completed a study of Cultural Tourism which identified partnership and marketing opportunities for Nova Scotia's museums, historic sites, national parks and festivals.

singapore

Main observations

There are important comparable elements in the tourism industries of Singapore and Scotland, most notably the importance of the public sector in terms of ownership, funding and state subsidy.

The central role of education and learning is a key raison d'etre for the existence of many of the public sector attractions.

It is primarily the private sector attraction operations that offer the most clear evidence of innovation in operation and managerial practice. Of particulate note is the creative extension of the visitor attraction product during periods where visitation is low.

Singapore's public sector demonstrates clear leadership in tourism. The Singapore Tourist Board's strategy for the next millennium, which is published in abbreviated form on the internet, evidences a clear strategy focusing on :

- **the importance of globalisation of business and the centrality of business tourism to the Singaporean product**
- **the rapidly changing needs of the global tourist and the increasing sophistication of customers**
- **the centrality of technology and the importance of on-line and internet marketing**
- **market positioning, most notably in the Singapore 'New Asia' campaign, which offers visitors a taste of a range of Asian cultures reflecting the ethnic mix of this island.**

Population and geography of country

Singapore is an island with a population of 3.4 million that has been continually used as a model of economic growth and stability in South East Asia. Clear government positioning, in respect of the economy, has allowed the country to move from a predominantly manufacturing base to an economy now based primarily in the service sector.

Estimated number of visitor attractions

There are a total of 56 major attractions in Singapore. They can be categorised by type as follows:

Attraction Type	No.
Island resorts (Sentosa)	1
Wildlife/ oceanarium/ insectarium	8
Theme based attractions	8
Museums and exhibition centres	9
Gardens	9
Sites (religious)	5
Sites (non- religious)	16
TOTAL	56

Private and public ownership

Of the 56 attractions in Singapore 48 are in public ownership in that they are operated either directly by the state or by private companies with some government interest. 3 are purely privately owned, and 5 are of voluntary status. This is illustrative of the large direct investment which the government has made in tourism. There are 53.6% of visitor attractions charging entrance fees and 46.4% free. State-owned museums typically charge the lowest entrance fees, equating to about one third of the cost of entrance to privately owned visitor attractions.

Main features of visitor attractions

Singapore's main tourism identity is as a late twentieth century destination known mainly as a 'shopportunity' short break destination, rather than a longstay recreational option. Its image is urban, modern and commercial and its attractions have not yet made any significant impact in softening this image internationally.

Major attraction development to date, has focused on the wildlife area, such as the Night Safari and Singapore Zoo, plus additions to the Sentosa Island complex of theme parks. Educational attractions or any aspect of leisure operations which have a learning element are consistantly popular with the Singaporean domestic market. Mature cultural attractions have seen the largest decline in visitor numbers along with garden oriented visitor attractions. The Singapore State Museums of Art and History are all failing to achieve significant growth despite considerable government investment. Interpretation remains relatively uninspiring with little attempt being made to engage the general audience.

As part of the National Tourism Development Plan, the Singapore Tourist Board will be developing a Tourism Satellite Account with the Department of Statistics, Singapore. This will formalise the collection of tourism data and increase the quantity and quality of information collected to help ascertain the contribution of tourism to the economy and enable the board to plan more effectively.

Market characteristics

Some 7 million visitors a year come to Singapore. Foreign visitors comprise the bulk of admissions to visitor attractions, making up 63.6% of all visitors. A higher percentage favour wildlife and garden attractions, while in contrast Singaporeans favour theme-based attractions, museums and exhibition centres. Tourism is among the top revenue earners for Singapore just below manufacturing, transport and communications.

Indonesia and Japan are the greatest sources of foreign visitors to Singapore, accounting for 15.8% and 15.6% respectively according to 1997 statistics. Collectively Indonesia, Japan, Malaysia, Taiwan and USA generate over 50% of foreign visitors. Intra-regional travel is crucially important as statistics demonstrate that in excess of 70% of visitors to Singapore are of Asian origin.

usa

Main observations

The main lessons which the USA offers Scotland are in the sophistication of the managerial techniques deployed at the country's best visitor attractions. The most important examples include excellence in:

- **Revenue generation through retail, catering and corporate hospitality**
- **Marketing to groups, especially families with children, with special products, prices and repeat visit incentives**
- **Stay longer on-site initiatives**
- **Beneficiary and endowment development**

The major USA attractions are all theme parks whose attendance figures dwarf even the biggest and most prestigious other kinds of attraction.

Though most of the attractions are nominally commercial, private sector ones, this conceals the fact that many are subsidised by charitable donations, bequests, community fund raising and staffing by volunteers.

In addition, a particular feature in America was the corporate establishment of new visitor attractions which provide high profile PR for companies within an entertainment framework.

The approach adopted in USA

The USA has a population of about 250 million; covers and area of 9,373,000 square metres and has a population density of 26.3 per square kilometre. In tourism terms, it is useful to view the USA not as a country, but a loose federation of states which have little contact or knowledge of each other. Because of this diversity, comparisons on a geographical, political or social basis are difficult to make and there are no central sources of tourism data. Indeed most tourism organisations, including large convention bureaux like those in Washington and New York, have small budgets for research and are particularly deficient in data on visitor attractions.

Because of the problems of getting an overall national picture, it was decided to focus the benchmarking on 4 regions which provided a sample of east and west coast destinations. The four areas included the three large east coast cities of Washington, New York and Boston, and California on the West Coast. In all locations an attempt was made to sample both metropolitan and outlying areas.

Although the area was not included in the research because of the preponderance of larger theme parks, any overview of the USA would not be complete without reference to Florida as the world's most significant tourism cluster. The area is the home of six of the country's top ten theme park destinations including Disney's Magic Kingdom, EPCOT and MGM Studios which all attract well in excess of 10 million visitors each year. Tourism development is still at a rapid rate of growth in Florida and is driven by the private sector.

With the exception of Washington, the USA has very little evidence of public sector ownership or intervention. However, the USA is unique in the fact that many of its visitor attractions are subsidised by charitable donations, bequests and community fund raising. There is also a very high dependency on volunteers as an integral part of staffing.

In Washington and Boston, the majority of visitors are domestic with about 8% being from overseas. New York is the USA's top destination for international visitors which account for about 17% of all visits to the city.

The principal lessons which can be learned from the USA are in visitor attraction management techniques. As a result, it was felt that this report should focus on the detail of these practices rather than providing a breakdown of statistics on each state or area involved in the research.

3 | critical success factors in visitor attraction management

The analysis of visitor attraction management across the ten countries was undertaken using a series of seventeen critical success factors to assist with the identification of areas of best practice.

These critical success factors have been grouped under five key headings of:

- **Product Development Innovations**
- **Marketing and Promotional Initiatives**
- **Revenue Generation and Funding**
- **Education and Training**
- **Community and Public Sector Intervention**

Perhaps unsurprisingly, the leading edge visitor attractions tended to present best practice across a number of the critical success factors, whilst the poorer visitor attractions did not feature at all. As a result, this may give the impression that the research only considered a small number of attractions. This is not the case, but is a reflection of the comparatively low number of visitor attractions which are engaged in activities worthy of note.

Cognaisance should also be taken of the fact that in many instances, the critical success factors often overlap and to avoid unecessary duplication, judgements have been made to feature certain best practices under the most appropriate heading.

product development innovations

new concepts

Key Findings

- Film, in a number of forms, is being used by many visitor attractions.
- Virtual reality can often be used to enhance or revitalise visitor attractions.
- Innovative architecture is evolving as an integral part of new site development.
- There is a wide use of theming in visitor attractions.
- Urban regeneration spaces are being developed to become visitor attractions in themselves.
- IT is being used in more visitor attractions, but there is little evidence of radically new technology.

This critical success factor attempts to identify new concepts either within visitor attractions or as attractions in their own right.

One of the major themes in this section is the role of film in the success of new visitor attractions. It can be used as an alternative means of interpretation or as an attraction in itself. Some of the advantages of film include its narrative capability and ability to convey special effects, as well as being a product which will encourage the visitor to stay longer on site.

In addition, many of the new 'super-attractions' cleverly use innovative architecture as part of the visitor attraction experience. In instances where the whole building is not a spectacle, efforts are increasingly being made to improve the impact of frontage or building facades to create an 'attraction apperitif'.

This research suggests that new technology is principally affecting promotion and marketing rather than product development. There is very little evidence of radically new technology and interactive technology is only in modest use to present scientific information to children.

Futuroscope, Poitiers
France

This visitor attraction is the first film-based theme park and incorporates IMAX, OMNIMAX, roof projection and seat oscillation. The site was opened in 1987 and performs a vital role as part of a public sector driven local development strategy. Each film experience is housed within a different spectacular 'space city' building which collectively dominates the skyline for visitors approaching Poitiers from the motorway. Futuroscope has been very successful and has had major economic impact within the Poitiers region, creating 1,200 full time employees and 15,000 jobs indirectly. The site attracted 2.8 million visitors in 1997, 89% of which were domestic visitors. These figures are closely related to the fact that the French are fervent cinema goers.

Holocaust Museum, Washington DC
USA

This new and controversial museum uses extensive film, photography, models and exhibits to tell the full story of the holocaust. It is housed within a modernist building on three floors and the sequential story is told as the visitor descends, symbolically, lower and lower into the museum. One of its main innovations is the provision of identity cards which match the profile of Nazi victims. The visitor adopts this identity for the duration of the visit. For two years it has achieved about 2 million visitors.

Newseum, Washington DC
USA

Newseum is a free-admission museum of news and journalism. It cost approximately $50 million to develop and in its first nine months attracted about 325,000 visitors. It is highly interactive and aims to inspire visitors with the media world. It incorporates an interactive newsroom, where visitors can be a TV or radio presenter investigating a story; a news wall across a 126 foot display of current world news as it breaks; a broadcast studio where visitors can watch and question journalists as they produce news programmes for TV or radio; and a blue-screen experience where visitors can make a video with a backdrop of national icons such as the Whitehouse.

La Coupole, St Omer
France

This is the latest of a series of flagship attractions in Northern France. It is called La Coupole, a history centre of space and rockets, but is actually a hi-tech development of the underground bunker in which Hitler's V1 and V2 rockets were stored and launched on London. It consists of slide shows, models, photographs, exhibits and extensive film footage which are assembled into multi-narratives through which the visitor is led by infra-red

new concepts

activated ear phones ensuring that appropriate commentary is narrated as the visitor walks through. The materials were selected from over 10,000 photographs and over 100 hours of film which were broken down and made into 15 minute documentaries. It has two restaurants and since it opened in May 1997, it has attracted about 200,000 visitors. Projections anticipate figures reaching 350,000 in 1998.

New York Skyride, New York
USA

Holland Experience, Amsterdam
Netherlands

Madame Tussaud Scenerama, Amsterdam
Netherlands

These are all virtual reality attractions which provide exciting, simulated trips to entertain and inform the visitor. As well as being commercial attractions in their own right, they also provide an orientation experience by giving an overview of a destination which acts as a catalyst for stimulating visits to other sites in the area.

Memorial, Caen
France

This is the flagship museum in Caen and is often referred to as the Peace Museum. Memorial was entirely publicly funded and is now managed as a local semi-public company with key investments being made by Air Canada and AT&T, amongst other organisations. As a flagship visitor attraction, the site has played an integral role in pulling together the local businesses in the area and its publicity suggests wider itineraries for the visitor.

It is housed in a spectacular modernist building and is mainly an account of the lead up to and period of the Second World War, followed by a film account of war and peace swings since 1945. The peace theme is established through the Nobel Prizewinners for Peace Gallery and the International Liberation Park. It has an impressive media library, a good shop and a children's play area with a childminding service. It uses hi-tech models, film, exhibits, and audio visual technology to convey the stories and themes. The site was launched in 1988 when it attracted 185,000 visitors, which then increased to 620,000 in 1994. This substantial increase can partly be attributed to the 50th anniversary of D-Day in 1994. Numbers have stabilised at around 350,000 per annum.

New Metropolis, Amsterdam
Netherlands

This Science Centre occupies a dramatic five storey site offering panoramic views over Amsterdam. It focuses on global developments, socio-economics and the environment using five key themes of Interactions, Technology, Energy, Science and Humanity. Among the displays are telecommunications, financial attractions and mobility. The admission ticket is a smart card which the visitor can use to access computer interactives such as Superbanker, video-conferencing, or to find the most efficient way of transporting goods around Europe. The museum exhibits are displayed to involve and stimulate visitors with the aim that they should develop their own programmes. As well as being a museum, it is also seen as a living and social space in Amsterdam. The development cost about £30 million and was jointly funded by federal government, the municipality of Amsterdam and about forty private sector companies.

Nausicaa, Boulogne France

Nausicaa Sea Centre is a marine based attraction which was launched in 1991 and by 1997 had attracted 4 million visitors. It gets 600,000 visitors per annum of which 47% are foreigners, with virtually all international visitors coming from the UK and Belgium. This visitor attraction is situated in a major tourism corridor which previously did not have a flagship visitor attraction. Consisting of spectacular displays of marine life behind glass, artificial lakes and pools, video and live exhibits allowing visitor interaction, the site was designed after a study of USA theme and leisure parks. It offers a resource centre, a cinema, educational programmes and an annual cultural programme.

Villedieu-les-Poêles 'The Village of Pots and Pans', Normandy France

This village demonstrates how a number of operators have worked together to create a theme village. Its identity has been built as a village of pots and pans, deriving from its heritage as a manufacturing area of brass, bells and copper. Its main street is dominated by retail of pots and pans, and there are a number of visitor attractions which relate to this core identity, including the Bell Foundry.

Kellog Heritage Center, Cereal City, Michegan USA

The mission of this attraction is to entertain whilst educating the visitors about the impact of the cereal industry on American culture. It covers 45,000 square ft and cost about $18 million to develop. The site features interactive and multi-media exhibits, themes theatres, immersive environments, galleries, shops, play areas and a quiet space with reference rooms and library. It also has a well designed play area with slides and tunnels which are cleverly disguised as giant cereal boxes and spoons.

new concepts

Temple Bar, Dublin
Ireland

Temple Bar represents the creation of a Bohemian Quarter as an attraction which combines heritage, entertainment, hospitality and retail attractions in a formerly run-down area of the city of Dublin. The whole area has been regenerated and revitalised through imaginative urban planning.

James Joyce Centre, Dublin
Ireland

This new museum was opened in a Georgian House which has been renovated and used to house Joyce memorabilia and artefacts. One of its unique features is that it is run by relatives or friends of the Joyce family.

consumer directed technology

Key Findings

- Through effective use of reliable IT systems, the visitor's experience can be made more satisfying and memorable.
- The core visitor experience can be extended and operators can ensure that key messages are delivered using new technologies.
- Different levels of interpretation can be provided to different groups, therefore responding to varying market needs.

Consumer directed technology refers to technology which is being used to facilitate interaction with the visitor or to make communication of key messages more effective.

This research has demonstrated that there are few new technological innovations in interpretation at visitor attractions. Use of infra-red headsets and large format film have both been in use since the late 1980's, whilst multi-media presentations and interactive installations have become a crucial means of interpretation in new science museum design.

Futuroscope, Poitiers
France

As an elaboration of the core visitor experience, there is a general use of film to attract interest and to convey stories. The critical mass of the buildings on the site is important as a means of conveying an impression of excitement and appealing to the youth market.

Newseum, Washington DC
USA

Newseum employs clever use of a videowall; ribbon of light giving current news updates; and touch screen interaction to fully involve the visitor. The aim is to achieve a sense of immediacy through the multiplicity of media presentational techniques and the topicality of the content.

Holocaust Museum, Washington DC
USA

The site uses multiple video films which add critically to length of stay and add historical authenticity to the visitor's experience. It also allows visitors to track an identified individual's fate to provide a more direct interface with historical events. In addition, research facilities are available for interested visitors to pursue personal interests as a result of their experiences.

Bayeux Tapestry
France

La Coupole, St Omer
France

Visitors can use an infra-red audio system, providing detailed information on each element of the exhibition. This allows flexibility for the visitor in that information can be obtained on request.

The Museum of German History, Berlin
Germany

Individually controlled handsets are available and are activated by entering appropriate numbers which are displayed in exhibition areas or beside certain objects. In accordance, multi-lingual short commentaries, historical re-enactment monologues and curators' explanations are narrated to the listener. This allows much greater autonomy and time control to the individual visitor as compared to standard audio tours, and also allows for more variety in styles of presentation.

animation and realisation

Key Findings

- A wide range of on-site animation activities has been developed to encourage more visitor interaction.
- First person interpretation can be very labour intensive but is extremely effective if done well.
- Occasional or one off events such as large-scale re-enactments can be very effective in bringing an historical site or period to life.
- When done well, traditional approaches, such as guided tours and scale models, can provide high levels of visitor satisfaction.
- Some of the more advanced visitor attractions are providing access to their behind the scenes activity to give further insight to the visitor about the site's operations. This can be particularly important as part of educational programmes.

Animation and realisation includes a wide array of techniques deployed to enliven the visitor experience at visitor attractions, generally with the aim of providing greater insight into how life used to be lived or in making it easier for the visitor to understand a technical process such as textile production.

Established techniques range from the traditional guided tour to the more recently developed historical re-enactment. Other methods include the reconstruction of vernacular buildings, or their renovation to original specification which are both now common practices.

Old Sturbridge, Massachusetts USA

Some established USA visitor attractions like Old Sturbridge have developed techniques to recreate past lifestyles by making use of character-based interpreters who respond to the visitor in the role of the historic person portrayed. This is a style of first person interpretation which depends crucially on acting skill and substantial historic research.

Sutter's Fort, Sacramento
USA

Sutter's Fort in California is an historic site, in the care of the State Parks Division, which has been completely restored to original specifications. There is a regular programme operating two days a week whereby schoolchildren from all over the State can spend a 24 hour period living in the restored Fort, taking part in activities which would have been participated in during the 1840s. Their presence adds additional animation to the site.

Monterey Bay Aquarium, Monterey
USA

State Railroad Museum, California
USA

There is a growing tendency for large and successful attractions to develop additional facilities which take the visitor 'behind the scenes' to show how things really work. At Monterey Bay Aquarium, the next addition to the very impressive array of interpretive features will be new galleries and exhibits showing the visitor how the aquarium undertakes some of its operations, such as feeding its inhabitants and preserving the right quality of water in its pools. As well as adding another dimension to the visitor attraction which will keep visitors on-site longer, it also provides an excellent educational tool. In a slightly different, but comparable elaboration, the State Railroad Museum has a restoration shop and is about to open a new facility which aims to explain the technology of the railways. This is a move only contemplated because the core experience is strongly social rather than technical in its interpretive approach. This development has clear relevance to attracting repeat visits.

Glacier Museum
Norway

La Coupole, St Omer
France

Moving models are sometimes dismissed as old-fashioned but can be the best solution to convey complexities which the visitor might find difficult to grasp and which do not lend themselves to other audio-visual interpretation. Examples which have worked effectively include models illustrating the workings of a glacier at the Glacier Museum, and how World War II rockets were produced and moved to launch sites at La Coupole.

animation and realisation

Newseum, Washington DC
USA

National Postal Museum, Washington DC
USA

Some attractions have begun to use feature film clips, to illustrate some of their thematic content. Newseum uses footage to show 1930s journalists at work, whilst the National Postal Museum uses old 'cowboy' movie clips to illustrate the difficulties of delivering mail in the 19th century.

marketing and promotion

marketing and pr initiatives

Key Findings

- Marketing best practices and innovations are seen as central to the success of visitor attractions.
- The principal method of promotional media continues to be printed materials and PR. Due to limited budgets, few visitor attractions have funds for extensive media advertising.
- News is often used as a means of creating momentum and for maintaining interest in the visitor attraction product. This can be as a result of exploitation of news stories about anniversaries, special events and exhibitions.
- The most successful visitor attractions in the USA and France have highly professional media kits which are used during PR activity.
- There have been significant developments in IT promotional networks on the internet with websites, virtual reality tours and other electronic information provision. Larger visitor attractions, particularly in USA, are using this medium to provide a wide array of information on prices, exhibits and events.
- In some instances, sales promotional and price incentives have been created to allow proactive targeting of groups.
- The visitor attraction product can be repackaged or represented to specifically appeal to new audiences or niche markets.

There is evidence of diverse marketing initiatives, particularly at visitor attractions in USA, France, Netherlands and Singapore which aim to create and maintain awareness in the public eye for visitor attractions. The more high profile a visitor attraction is, the more likely it is to be visited and as a result, marketing and PR are crucial elements in visitor attraction management.

marketing and pr initiatives

The web itself is constantly evolving and the USA provides many examples of visitor attractions with attractive, interactive and constantly updated web pages. Availability of detailed information on opening times and special features on the web is now generally expected by visitors as part of a visitor attraction's marketing activities to allow them to plan touring itineraries.

Museum of Modern Art, New York
USA

This museum uses focus groups to pave the way for creative developments for the site. The inhouse marketing and PR team then take on board and deliver the suggestions made by the group.

Smithsonian Museums, Washington DC
USA

Museum of Modern Art, New York
USA

Newseum, Washington DC
USA

Museum of Science, Boston
USA

An enormous wealth of information now exists on the Internet and all of these visitor attractions operate sophisticated sites. The Museum of Modern Art has already generated inquiries from remote places with appreciative letters and, in some instances, conversions into visits. The sites can also be used by the visitor to ascertain pre-visit information such as opening times and scheduling of special exhibitions to allow the planning of itineraries. More sophisticated systems are being developed now by museums providing interactive graphic displays or 3D presentation of artefacts. Another more recent development is electronic trading which can involve discount ticketing, retail purchasing, corporate hospitality bookings and educational visits.

La Coupole, St Omer
France

La Coupole used a distinctive press pack to launch the site which included a folder containing over 50 pages of details including an English language leaflet; a 32 glossy illustrated history of the rocket site; a four language photokit of photographs of the attraction, and two four-colour maps giving travel directions. The launch was also supported by heavy poster advertising in the vicinity. La Coupole has a separate, glossy colour prospectus which has been specifically compiled for targeting the educational market. This approach has been substantiated with a special pricing structure for schools. It also has a product programme designed for different levels of educational development.

Futuroscope, Poitiers
France

Futuroscope developed a ten year anniversary event with special press pack and supporting materials. The press pack, which is also produced in English, consists of six chapters: A word from our President, Concept and Architecture, Guided Tour, Practical Information, the Futuroscope Teleport and Facts and Figures.

In 1997 the site also developed a new pricing strategy called the Futuropass which is valid for three years. This provides discounts for groups and families on entrance and in the sites retail outlets and restaurants.

Newseum, Washington DC
USA

Newseum is a good example of brand naming to capture the idea of a new concept in museums. The site succeeded in attracting 360,000 visitors in 9 months and this can partly be attributed to the fact that the visitor attraction began working with the travel trade, tour operators and transport companies during development. As a result, industry demand had been partly created before it opened.

National Parks, California
USA

Parks in California offer 5 categories of visitor passes: Annual Passes offering an unlimited number of entries for one year; Golden Bear Passes for people aged 62 and over with monthly incomes not exceeding $669 single, or $1174 married, or for disabled people; Limited-Use Golden Bear Passes for those aged 62 and over during off-peak season; and Disabled Discount Passes.

Le Clos-Luce D'Amboise
France

This Leonardo Da Vinci attraction uses colour coded brochures and internal signposting in six languages.

marketing and pr initiatives

Washington Convention and Visitor Bureau
USA

The Black Heritage Trail in Washington is marketed through a 32-page guide 'African American Historical Attractions Guide'. Existing products, such as museums, galleries, theatres and visitor attractions, have been repackaged promotionally with the theme of black heritage to give them a new resonance and new market segmental appeal. This initiative can be partly seen as a marketing technique devised to attract new visitor segments, but partly as a community venture which recognises that in some parts of Washington the population is up to 70% black.

partnership innovations

Key Findings

- Strategic alliances and partnerships are critically important for the effective marketing of visitor attractions.
- Geographic clustering of visitor attractions can be an effective means of creating new synergy between the sites but also create critical mass which can have greater impact in marketing terms.
- The development of uniform promotional materials for visitor attractions in a region can enhance the regional corporate identity as well as making access to information easier for the visitor.
- Partnerships tend to be within visitor attraction sectors, such as museums, rather than across all attraction sectors.
- Joint marketing, comprising ticketing, maps and leaflets, can be used effectively to share promotional costs and to encourage visitor dispersal.

The importance of strategic alliances amongst visitor attractions and with other sectors, as well as with organisations involved in providing services for visitors, cannot be overemphasised.

Specific attraction sectors involved in partnership arrangements are common as are the clustering of visitor attractions to create synergy and critical mass. Successful joint marketing initiatives often involve linking visitor attractions to public transport services, with joint ticketing, providing discounts to less popular sites in regional or city guides, or advertising links to general retail provision such as department stores.

Singapore Tourist Board
Singapore

The Singapore Tourist Board undertakes the formal organisation of websites for tourism businesses on the island. Visitor attractions produce copy which is then screened to fit a national promotional style and image in other tourist guides. The guidebooks are distributed at strategic tourist areas and entry points. One of the strengths in this approach is ensuring a standardised format and distribution to maintain a quality image.

California Division of Tourism State Map
USA

The state map links a variety of tourist services, including visitor attractions, which is paid for by sponsorship and advertising. It is distributed to schools as a 'state project' which is part of the national curriculum and is therefore a useful means of linking an educational remit with the distribution of promotions.

Comite Departmental du Tourisme, Poitier
France

Promotional cards have been introduced in this region to promote visitor attractions, such as castles and archaeological sites. The cards are colour coded for different areas of the Poitiers region. They are in a standard, open-out 4 sided format with details of each site including a colour photo front, a one page description, opening times, admission prices and a regional map. They are displayed throughout the region in hotels and tourist information centres and their pocket size format makes them easy to carry for easy reference. This collective regional corporate identity is distinctive.

'Petites Villages de Caractere'
France

This is another promotional partnership scheme, operated by the public sector whereby, villages can apply for status as small villages of character which are then promoted together as a heritage group. They can use the corporate symbol of the group on their signage and publicity, and have an individual listing on uniform cards which are obtainable from tourist centres. Again it demonstrates the effort the French put into getting traffic through a region based on creating synergy between relatively minor attractions.

Departments of Calvados, La Manche, L'Orne, Comite Regional de Tourisme de Normandie, Normandy France

The D-Day landings and the Battle of Normandy Trail Development is a marketing and promotional venture to exploit the Normandy sites. The campaign is closely shaped to appeal to English visitors, the prime market in the region. It was launched in 1994 with a purpose-developed corporate identity logo and specially commissioned book. Other supporting information exists which include an illustrated, fold-out map with a questionnaire to find out who visited; which sites and museums were visited; and whether visitors followed a designated route. Two CD ROMs and eight audio-cassettes were also made and sold commercially to support the Normandy trail.

Battle Fields of the Civil War Promotion, Virginia USA

This promotional theming and banding together of many Civil War locations into a systematic trail rose as a response to the interest generated by a major TV series on the Civil War in 1995. It is spearheaded by a thick broadsheet newspaper which provides a well-illustrated overview of the war, and is distributed alongside promotional leaflets for every separate location and attraction by the Virginia Tourist Association in Washington.

Canadian Heritage Inventory Network (CHIN) Canada

All Canadian museums are linked through this organisation, funded by Federal Government, which provides a database for educational and research purposes and advertising of museums in a website linked network.

The Hague Museums Booklet Netherlands

This is a joint promotion of two museums, Mauritshuis 'Princely Patrons' and Historical Museum 'Princely Display' in an imaginative folding publicity leaflet produced by the municipal authority.

New York Convention and Visitor Bureau
USA

The Big Apple Visitor Guide links visitor attractions, retail and other tourist services with a variety of sponsors, advertising and a discount 'money saving coupon' scheme. The guide also integrates a map, shopping, accommodation and attractions information with discount schemes which are all subdivided by a colour coded scheme.

City Pass, San Francisco
USA

'City Pass' is a multi-attraction ticket that provides access to the city's top six visitor attractions at a discount price. The ticket works on the basis of a limited life of five days, wherein it is very difficult to visit all of the attractions, and thus there is a net gain in admission fees without a consequent net increase in visitor numbers.

There is also a 'City Pass' in Boston which includes the following major attractions: Hancock Tower, Museum of Science, JFK Library and Museum, New England Aquarium, Museum of Fine Arts, and Isabella Stewart Garner Museum.

Amsterdam Pass
Netherlands

This is a cultural and leisure pass for the city of Amsterdam linking museums which have free or discounted entrance, transport, food and drink and retail goods. The pass offers substantial discounts across all of these services.

Lillehammer Olympic Attractions
Norway

As a result of the Winter Olympics in 1994, there is now close co-operation between local authorities, the International Olympic Committee and private attraction operators to provide long term improvements in the range and quality of visitor attractions in the area. There have been a variety of joint ventures to convert winter sports facilities, such as bobsleigh runs, ski jumps and ice-rinks, into visitor attractions and local leisure facilities.

Oslo Card
Norway

The Oslo Card, organised and promoted by Oslo Promotions AS, links transport with museums, other visitor attractions and activities for a daily price. It encourages use of public transport and a wider dispersal of visitors to visitor attractions. In addition there is also a grouping of

partnership innovations

similarly themed museums in close proximity on the peninsula near the centre of Oslo which share visitor markets. The Viking Ship Museum, Norwegian Folk Museum, Kon Tiki Museum, Fram Museum, Maritime Museum are all in walking distance in pleasant surroundings.

Museums of Science
USA

The five major Museums of Science in the USA co-operate to share blockbuster exhibitions to maintain the year round interest of the local market and to create national awareness through joint marketing. IMAX technology is also shared throughout the year.

Children's Museum, Boston
USA

Museum of Science, Boston
USA

New England Aquarium, Boston
USA

These three leading Boston visitor attractions have formed a group to focus on accessibility for the 0-10 year market, which has been identified as an important market for repeat visits.

Computer Museum, Boston
USA

Museum of Fine Arts, Boston
USA

Ranklin Park Zoo, Boston
USA

Harvard Art Museums, Cambridge
USA

Isabella Stewart Gardner Museum, Boston
USA

These visitor attractions work in partnership with the aim to improve access to children in the 0-10 age group and their families in an educational and entertaining way as well as sharing best practice. The goal is to have all local area children visit each institution by the age of five. It is believed this partnership approach can offer the city a competitive edge in targeting the family market.

Museum Boat, Canal Cruises
Netherlands

The Museum Boat is scheduled transport on the canals linking main Amsterdam museums and other visitor attractions, with private boat operators to provide an enjoyable, flexible means of visiting museums. The ticket includes up to 50% discount on entrance fees to the sites.

Santa Claus Land, Rovaniemi
Finland

Partnerships have been formed to integrate the development and promotion of visitor attractions in the Rovaniemi area with Santa Claus Land as the core attraction. Public authorities, private attractions operators, retail, accommodation and outdoor activities are working together to lengthen stay and cater for wider range of visitors.

Villedieu-les Poêles,-Normandy
France

A disparate group of nine independent attractions, including the Bell Foundry, and a helicopter touring company, has banded together to gain critical mass and promote in the face of public sector strength.

World War II Battlefield Trail
France

This trail includes details of around forty Second World War battlefield sites and associated visitor attractions which are promoted together in a 200 page booklet.

Bayeux Museum
France

The Bayeux Tapestry is the major, world class attraction at Bayeux attracting 377,085 visitors in 1996. As part of a sales promotional initiative, the museum now packages its own product with that of two smaller museums of Musee Baron Gerard and Musee d'Art Religieux which attract 16,000 and 5,000 visitors respectively. They are some way apart so the offer potentially extends the length of visit and also increases the chances of further expenditure in the town as the visitor negotiates the itinerary between attractions.

partnership innovations

Le Chateau des Aigles, Chauvigny France

This natural attraction has cleverly promoted its eagle and bird of prey park on the back of Futuroscope by overprinting a red swaith across the front page of its leaflet marketing the visitor attraction as being on the doorstep of the region's flagship visitor attraction.

repeat visit incentives

Key Findings

- Visitor attractions often use membership schemes and school visits as a means of encouraging repeat visitation.
- Shared programming between similar types of visitor attractions can generate more occasions for special promotions to stimulate repeat visits.
- Visitor attractions sometimes offer inducements and privileged access for local residents and as part of a loyalty package.

In visitor attraction operations, repeat visitation is of crucial importance particularly due to the high dependence on the domestic market. It is well known that the cost of attracting a repeat visit is much less than that of recruiting a new customer. Repeat visits can therefore make a substantial and disproportionate contribution to revenue generation. School visits have long been recognised as an important stimulus for subsequent family group attendance.

In order to attract repeat visits an attraction has to deliver a minimum of a satisfactory customer experience. Customer care is important, as is an adequate flow of management information about visitor origins and levels of satisfaction. However, the most powerful inducement for a customer to visit for a second or subsequent time comes when a new facility is added, or some special event such as a temporary exhibit is organised and promoted.

Fine Arts Museums of San Francisco
USA

In leading American public museums carefully graded schemes are in operation to attract individuals or corporate bodies to become subscribing members. A range of special privileges can be offered as inducements including reduced admission fees, free admission to special exhibitions, invitations to previews, member evenings, savings on merchandise and free copies of members' magazines.

Museum of Science, Boston
USA

This site has been building customer loyalty through regular communication with its membership. Circulars are mailed out on a regular basis to loyal customers to allow advance planning of visits for special activities and events. The education market is also targeted by building networks with science and technology teachers to promote key programmes such as Lab Exploration, DNA Fingerprinting and the Cosmic Adventurer.

Museums of Science
USA

The six leading science museums,including the Boston Museum of Science, under the banner of Science Museum Exhibition Collaboration, share single touring exhibitions in rotation to provide a stimulus for repeat visits. This concept also maximises the utilisation of scarce resources. Personnel suggest that temporary exhibition spaces should be revamped every ninety days at a minimum. In addition, some of the museums' corporate sponsors, such as Microsoft, are given free passes for their workforce which they can use as an employment benefit.

Museum of Modern Art, New York
USA

Incentives are provided by having reduced charges for evening visits and also early morning and late night opening in connection with 'blockbuster' exhibitions. This is also an important form of visitor management and helps to reduce queues at peak times.

Lusto, The Finnish Forest Museum
Finland

This museum offers VIP cards for local business people to encourage them to bring business guests to the site. Local residents are also offered free admission for subsequent visits if they bring one other visitor.

life cycle extension initiatives

Key Findings

Extending the life cycle of a visitor attraction product can be achieved by adopting two main strategies:

- The reactive catch-up which consists of add-on visitor attraction features which are developed to stop and reverse a major decline in visitor numbers.
- Built-in regeneration which consists of incorporating regeneration options and potential from the visitor attractions's inception. This approach is now widely visible at many of the new flagship attraction developments in the USA, France and the Netherlands.

The life cycle issue is very closely related to repeat visitation and is of crucial importance in terms of allowing visitor attractions to evolve.

In some instances the product can be adapted or changed by the management, however research has demonstrated that there is an abundance of small visitor attractions which have limited ability to make these changes. Such examples include small museums which have been formed by a single bequest or collection and are located in buildings which cannot be revitalised as a result of minimal resources.

Singapore Zoo
Singapore

Night time visitation has been introduced using special lighting to allow visitors to see nocturnal animals. This innovation increased revenue to the zoo as well as creating a better visitor experience due to animals being less active during the day because of the intense heat.

Santa Claus Land, Rovaniemi
Finland

The Santa Claus Land product was extended by adding a new satellite site which doubled as a nuclear bunker. The new location, called 'I'm dreaming of a Christmas with no fallout' gave Santa Claus Land a more interesting and appropriate underground setting.

Le Clos-Luce D'Amboise
France

The building was formerly a privately owned heritage attraction which had once been the home of Leonardo Da Vinci. The revamp consisted of reconstructing models of many of Da Vinci's works and animating his theories. The attraction was the first French monument to use a continuously projected 56 minute film. Its visitor numbers have increased in ten years from 38,000 to 250,000 per year.

MCI Centre, Washington DC
USA

This nationally famous leisure attraction has been extended with a National Sports Gallery. This includes new interactive technology featuring: 9 interactive games from Shot on Goal ice hockey to Rookie-Camp football; Cyberplayground with 6 computer Arena Net stations with free internet connections and the interactive game 'The Huddle'.

National Museum of History, Washington DC
USA

This established Smithsonian visitor attraction has recently adopted a number of interpretative techniques which demonstrate the place of interaction technology for educational use in the sphere of science teaching and interpretation. It includes: Volcano Interactive where visitors use a computer to build a volcano and watch it erupt; Real Time Earthquake Data Base which monitors earthquake activity throughout the world and shows how it happens; Crystal Formation using computer graphics to take visitors inside a crystal cave to show how crystals are formed; and Hologlobe which is a 3 dimensional projection of the globe which projects cloud cover, ocean temperatures and wind patterns.

Empire State Building, New York
USA

This attraction has attempted to revamp its entrance with a six foot model featuring King Kong. In addition, there is now a new virtual reality trip, New York Skyride which can be bought with admission as part of a package. This ride is hugely popular with young people and has effectively more than doubled the entry price.

Futuroscope, Poitiers
France

Futuroscope uses film as a regenerative tool. The life cycle of the site is being constantly revitalised by changing the variety and kinds of film which are used throughout the twelve main theatres.

life cycle extension initiatives

Maihaugen Folk Museum, Lilliehammer
Norway

This outdoor folk museum is constantly evolving through the launch and creation of new exhibits. It thus has a permanently self-renewing quality, a built-in regenerative factor, which is a good example of using life cycle extension as an ongoing proactive, as distinct from a reactive process.

Nausicaa, Boulogne
France

This highly successful visitor attraction is being significantly redeveloped after only six years. The extensions, which will double the site's space, is intended to increase visitors by 250,000 building the total annual volume to 850,000.

New Metropolis, Amsterdam
Netherlands

Although this visitor attraction was only opened recently, the management are already embarking on the first development phase which aims to attract a new, younger market through an extension which focuses on careers and vocational training. This is a particularly challenging project as the 16-25 market segment, traditionally, has been a difficult market for museums to attract.

seasonality extension initiatives

Key Findings

- There is clear evidence of visitor attractions targeting new or different markets, such as local residents and school groups, outside peak periods.
- Packaging visitor attractions imaginatively with other products or services, such as accommodation and transport, can provide custom-made options for the visitor and can assist in extending the season.
- Visitor attractions can promote a variety of different products, images and activities to create all year round opening with numerous peak seasons.
- Differential pricing systems can be used as an incentive for visitors off-season.

A major constraint on efficient use of visitor attractions is the effect of seasonal fluctuations on visitor demand. Clearly this affects some destinations more than others depending on geographical and climatic conditions.

Nearly all of the visitor attractions which were visited for this research, rely on the domestic, and particularly the local, market out of season.

Bayeux Tapestry
France

There is a year long cultural programme, including specialist lectures for local groups in winter evenings.

Hadeland Glassworks Factory
Norway

This glassworks factory has developed special off season packages for pensioners. It has also been very successful in offering whole day incentive trips for businesses.

Museum of Science, Boston
USA

This science museum has developed a series of targeted school vacation and adult education courses, computer education programmes and lectures to stimulate interest all year round.

Maihaugen Folk Museum
Norway

There is a rolling programme of events which fits in with the main tourist season and local traditional calendar.

Old Sturbridge, Massachusetts
USA

Old Sturbridge now operates a year round calendar of events based on the agricultural activities of 19th Century New England. This is linked to exhibitions such as quilt making and activities such as seasonal games which provide an attractive package for the visitors throughout the year.

seasonality extension initiatives

Tivoli Gardens, Copenhagen
Denmark

Tivoli Gardens operates as an amusement park for the majority of the year. A Christmas market has been opened in December providing additional retail space at peak period and also a means of attracting visitors during a normally quiet time.

Memorial, Caen
France

Memorial offers differential pricing off-season for school visits and retired visitors.

Futuroscope, Poitiers
France

Futuroscope has developed a variety of pricing initiatives and events to target specific groups during the low season.

Santa Claus Land, Rovaniemi
Finland

This visitor attraction has created a range of products and images geared towards different overseas markets for different times of year. Building linkages between a range of attractions and activities around the 'Santa' theme has created an all year round international attraction complex and has resulted in the development of eight peak seasons.

revenue generation and funding

on-site retail and catering initiatives

Key Findings

- Visitor attractions often present themselves as a series of products which allows the visitor greater choice and flexibility, whilst also increasing the total spend per head.
- Innovation and quality, in terms of retail and catering, are key to building customer loyalty and increasing potential spend from visitors. This also extends to the design and layout of these areas.
- Many visitor attractions also develop the visitor experience and the product by innovative use of branded retail and thematic catering. The linkage of the visitor attraction's characteristics to the food in terms of menus, product content and service is of critical importance.
- Appropriate investment in professional staff and facilities for retail and catering on site is crucial for generating additional revenue.

Maximising the visitor's spend on-site is becoming an increasingly important issue for visitor attractions, even for those which were previously seen to be outside the commercial arena.

Retail opportunities are a crucial source of revenue and visitor attractions are now starting to take a more sophisticated approach with new techniques such as themed or branded retail as well as direct mail.

Hospitality also now occupies a much more central role. A stylish restaurant or café can help to create ambience; increase the visitor's length of stay; contribute to the visitor experience and, not least, generate a valuable revenue flow. These areas can be used and are often promoted as a meeting place and social experience as well as a source of refreshment.

Children's Museum, Boston
USA

The Children's Museum has introduced 'Sleep-overs' which are an educational experience,

on-site retail and catering initiatives

involving an overnight stay with meals for a fixed fee of $35. They build ownership and loyalty to the museum from the local domestic catchment. This corporate approach is reinforced by retail and merchandise souvenirs which are aimed at this 'Sleep-over' market. Top selling items include tooth brush sets and T-shirts with the logo 'I slept on the floor of the Children's Museum'.

In addition, the Children's Museum also puts on a number of events such as Halloween parties where event retail merchandising is fully exploited, often with an educational message. For example, children can buy Halloween 'goody' bags which include non-sugar items, soaps, toothpaste and toothbrush.

There is also a 'Recycle Shop' within the Children's Museum selling all kinds of disposable goods for craft and creative play. The revenue stream is good and the environmental message is clearly made in all aspects of the operation including recycled packaging materials. This is considered to be the most successful re-use program in the USA.

The Museum is currently considering using catering as a form of entertainment by installing a glass wall in its kitchen to allow visitors to see food preparation by chefs. Some elements of food production and interpretation will also be incorporated. This whole concept is planned to increase the length of visitor's stay and spend on-site.

Museum of Science, Boston USA

This museum presents itself as attractions within attractions which incorporates the Mugar Omni Theatre IMAX screen; Hayden Planetarium; Laser Shows; Theatre of Electricity and General Exhibit Halls to allow the visitor greater flexibility. All are separately time-tabled over a daily programme but visitors can buy either single entry or combination tickets. Combination tickets include 'early bird specials' as an incentive to visit during quieter periods which also acts as a way of influencing visitor flow.

The museum also has a detailed retail strategy which comprises of one primary top quality retail outlet along with a range of smaller themed permanent and semi-permanent sites at entry and exit points.

In addition, the museum has undertaken a development of integrated food courts incorporating multi service food counters comprising a variety of food types. This combined floor space allows for 500 seats with summer terrace usage. As a result of this, the museum has been able to increase its exhibition space and make better use of the view over looking the Charles river and the Boston city skyline, making it a better experience for the visitor.

Artis, Amsterdam Netherlands

Artis combines a zoological museum, planetarium and aquarium which have all been developed within 19th century buildings and neo-classical surroundings. This is also presented to the visitor as attractions within attractions.

Museum of Modern Art, New York
USA

Plymouth Plantation, Massachussets
USA

The retail outlets in these sites position themselves as offering unique and distinctive products specifically relating to the theme of the visitor attraction. For example the Museum of Modern Art in New York has one of the finest design retail stores in the world and an outstanding art book shop. The Plymouth Plantation is about to incorporate a garden centre offering a range of specialist equipment and literature on topiary.

Museum of Modern Art, New York
USA

The Museum Garden Café extends the museum space into a catering area around a themed exhibition space of furniture, art works and design narrative forming a showcase for Dutch contemporary design. This provides more space for the museum to exhibit whilst also giving the visitor a memorable hospitality experience.

Boston Museum of Fine Arts, Boston
USA

The Boston Museum of Fine Art successfully linked its restaurant and café menu to the touring exhibition of Irish Art in both style and writing as well as introducing a range of Irish produce to the menus.

Metropolitan Museum of Art, New York
USA

This museum is developing a variety of sophisticated museum catering options offering the visitor more choice and range. Seasonal venues such as the Roof Garden have been developed as limited catering options but offer some of the best views in Manhattan. Although this is not an ideal catering site, management realise the visitor attraction potential during the summer months.

Singapore Tourist Board
Singapore

Singapore has integrated food and beverage into an overall events strategy for the island. Festivals such as the Singapore Food Festival are used by visitor attractions in catering and exhibitions to present additional promotional opportunities.

on-site retail and catering initiatives

Monterey Bay Aquarium, Monterey
USA

There is an Oyster Bar and Fish restaurant on site.

corporate hospitality initiatives

Key Findings

- Corporate hospitality is now a key source of competitive advantage in visitor attractions. Variety and quality are central to its success.
- The revenue potential of using visitor attractions for meetings, corporate hospitality and product launches is currently underdeveloped.

Plymouth Plantation, Massachussetts
USA

This site has developed the potential of function trade. Weddings are one such example where the wedding parties dress in turn of the century costume and experience themed hospitality.

An authentic dining experience has been developed using turn of the century recipes. Dishes are served by 'interpreters' in costume and roles. The experience is further enhanced as village buildings are lit by candlelight and a range of activities are offered. These include gambling, period entertainment, tavern suppers, and horse drawn carriage rides which are extremely popular and profitable.

Metropolitan Museum of Art, New York
USA

Art Gallery of Canada, Ontario
Canada

These sites operate a policy in corporate hospitality, where only corporate donors are able to hire facilities for functions and product launches.

Isabella Stewart Gardner Museum, Massachussets
USA

This museum plays on its dramatic interior and exterior as a venue for weddings which is a very lucrative part of the site's business.

The Intrepid Sea, Air and Space Museum, New York
USA

USS Intrepid offers corporate hospitality facilities in a very unique location. This towering, spotlit vessel, moored on the Hudson river, can be transformed into an outdoor banquet hall which can accommodate 5,000 guests. It has been widely used for fund raising events by companies such as Pepsi, Chrysler and AT&T.

other revenue generation initiatives

Key Findings

- Particularly in the USA, there is significant revenue potential for visitor attractions from endowment funds, beneficiaries and gift aid.
- Membership and Friends programmes also provide an important source of income to many visitor attractions.
- In some instances, significant funding has been raised through corporate sponsorship.
- There is some evidence of exploiting branded retail opportunities for visitor attractions at selected locations off-site.

In many museums in the USA, benefactor funding and endowment provides a huge additional funding source. This method of financing is well developed and considered as critical an element of museums management as curatorial services.

Membership and membership privileges are also a lucrative growth area. In leading USA public museums, carefully graded schemes are in operation to attract individuals or

other revenue generation initiatives

corporate subscribing members. Many offer special privileges as inducements such as reduced admission fees, invitations to previews and savings on merchandise.

Museum of Modern Art, New York
USA

Membership, investment and fund contributions, which collectively generate about one third of the total operating budget, are of critical importance to the museum. Fund raising has become a major focus.

Annual membership constitutes a segmented and highly targeted sales opportunity. Examples include individual, dual, family, family plus, gifted, concession, corporate family and donor or benefactor memberships. Special events, such as breakfast previews, lunches and celebrations relating to exhibitions and collections, are organised to build loyalty amongst the membership.

Membership benefits are constantly being reinforced by obvious discount ticketing systems. In addition, this site offers unique top of the range branded merchandise through one high quality retail outlet in New York.

Children's Museum, Boston
USA

Membership and family membership account for about 45% of the museum's operating budget and are seen as an important performance indicator of the site's success.

Partly as a revenue generator and partly as a marketing tool, the Children's Museum has a retail unit in Boston's Logan Airport adjoining the 'Kidport' museum which is designed as a play area that provides children awaiting flights with an educational experience related to issues about travel.

Children's Museum, Boston
USA

Museum of Modern Art, New York
USA

Corporate Membership is sold to firms or offered to donors as an increasingly important element of the funding package. Firms market their donation activities and distribute free entrance passes to employees as an element of the employment package. More sophisticated packages are directed at particularly large donors such as special events aimed at corporate donors children.

Museum of Science, Boston
USA

Extending its retail opportunities off-site, the Museum of Science in Boston has one satellite retail store in the Boston Children's hospital. This shop offers science-related educational gifts, toys and merchandise that are appropriate for hospital bound children. As well as providing an additional retail revenue stream it acts as an ideal communications channel and soft sell for the Science Museum.

stay longer on-site initiatives

Key Findings

- The length of visitor's stay is an important factor at visitor attractions as higher dwell time is generally associated with higher spend.

The visitor's length of stay can be influenced by a number of factors including the subject matter of the visitor attraction and how it is interpreted; the variety of activities offered; the level of innovation at the site; and the quality of the product and service.

Sutter's Fort, Sacramento
USA

Museum of Science, Boston
USA

Children's Museum, Boston
USA

These sites provide sleep-over facilities and Nature Education for children. This allows young people, particularly in the local catchment area, to stay for a 24 hour period with an educational programme, food and activities. The Museum of Science, Boston has attracted some 18,000 additional visitors per year by doing this and, at the rate of $35.00 per night, this has become a significant market.

stay longer on-site initiatives

Children's Museum, Boston
USA

The Children's Museum is a highly interactive museum with a range of activity and hands on displays which are extremely popular with children in the 0-10 year group. It is the range of dynamic and changing displays that is one of the real strengths of this museum offering educational and entertaining play, which does not have to resort to high technology, in order to engage the child audience. It is also entertaining for adult visitors.

Currently the range of exhibits include: Boats Afloat, Build it, Climbing Sculpture, Giant's Desk Top, Grandparent's Attic, Grandparent's House, Hall of Toys, Japanese House, Pueblos, Kidstage, Playspace, Science Playground, Supermercado, Tee Tokyo, TV & Me, Under the Dock, Weaving and We're Still Here.

The activities appeal to a wide range of ages which means a whole family can visit the site and be entertained increasing the length of stay. The idea and the novel use of space has become so successful that the Children's Museum is now developing play spaces in a range of public places such as shopping malls. This acts as a soft sell for the Children's Museum and also creates a direct revenue stream.

Guggenheim Museum, New York
USA

Museum of Modern Art, New York
USA

Metropolitan Museum of Art, New York
USA

Family Activity Guides have been produced by these museums recognising the importance of the under-16 market. Free and paid publications, which are specifically aimed at children, have been developed with interactive exercises that relate to exhibits or collections. Providing the children with activities can improve quality of the adult visit, increase dwell time and encourage repeat visitation.

Old Sturbridge, Massachussets
USA

The provision of accommodation in period style that is available for hire on site allows the visitor attraction to capitalise on income from accommodation and catering by increasing the visitor's stay time.

education and training

managerial quality issues

Key Findings

- The growing awareness of the business aspects of cultural attraction management has begun to influence the selection of managers and encourage visitor attractions to recruit outwith the site, and often the sector, for managers required to fulfil a commercial or specialist, rather than curatorial role.
- In many countries, conferences and networks within relevant professional associations are a key resource for professional development for visitor attraction staff.
- Some of the newer, leading-edge visitor attractions are beginning to recruit graduates with specialist degrees.

Museum of Modern Art, New York
USA

The Museum of Modern Art has recruited its museum shop managers from the retail sector. In addition, it also sends some of its executives on Disney's visitor attraction management programme, 'Learning from the Best'.

Museum of Science, Boston
USA

The museum's management programme, 'Public Interface', is conducted over three to five days where senior management work on guest services operations. This is designed to build team spirit and morale as well as allowing senior personnel to understand the challenges of these critical roles.

managerial quality issues

American Association of Museums

American Association of State and Local History

Association of Living History Museums

Canadian Museums Association

Association of International Visitor Attractions, USA and Canada

American Association of Theme Parks

These associations provide professional development and networking for museums, art galleries and visitor attractions. The biggest professional association is the American Association of Theme Parks which has about 3,000 members across the USA and has regular meetings. This results in a wider awareness of the national theme park picture than of other kinds of visitor attraction developments.

La Coupole, St Omer
France

Staff with degrees in the subject area related to a particular aspect of the visitor attraction are recruited.

Memorial, Caen
France

Here there is recruitment of trilingual guiding staff to meet visitor needs. In addition, PR staff are required to hold degrees in PR.

training and human resource development

Key Findings

- Training and human resource development are critical areas for all operations involving people for service quality delivery. Disney is widely acknowledged as being the world leader in this field.
- The motivation and management of volunteers within visitor attractions provide valuable lessons which can be adapted and adopted for implementation with employed staff.
- In Europe, particularly in France, linguistic training is seen as being an increasingly important element in developing a competitive advantage for the visitor attraction product.

Training is seen as a major element of visitor attractions management but in many cases, it is seen as an internal matter with training being delivered on-the-job, rather than one which can require significant external input.

The Disney approach is seen as the benchmark for all other programmes in terms of visitor attraction planning, market-oriented development, delivery of guest care and the visitor experience. Disney's excellence in this field is recognised within national cultural attractions, but also by other sectors such as the manufacturing, motor and service industries.

All museums which were visited in the USA augmented and supported professional staff and permanent employees with seasonal staff as well as volunteers. Volunteer management is where most of the interesting initiatives were observed. Most volunteers are interpretative guides, sometimes in costume or charactered part, interns or consultants whilst some are sourced from the membership of a 'friends' of the visitor attraction group. In the USA, volunteer training is particularly well organised with in-house orientation. All candidates have to undertake some form of internal training which is more sophisticated in the larger, leading edge visitor attractions.

Walt Disney World Resort, Florida
USA

Disney is clearly the exemplar in the field of staff motivation and training. Through the Disney University, courses are delivered to prospective trainees on site which concentrate on guest

training and human resource development

care and the visitor experience. There are also courses for the management staff of businesses which focus on leadership skills. Disney reinforce their approaches by qualitative and quantitative market research which informs their product development processes.

Museum of Modern Art, New York
USA

A number of staff have attended the Disney Visitor Attraction Management courses and key museum staff, using some of the key lessons and techniques used by Disney, have developed a staff motivation and customer care programme which is appropriate for their staff and site. This will be delivered in the Museum of Modern Art this year.

National Parks
Scandinavia

It is a requirement for employees in the National Park Services to be qualified in Ecology or a related area. In addition, whilst in work, employees participate in on-going environmental interpretation programmes.

Museum of Science, Boston
USA

Multi-cultural workshops have been introduced for all museum staff to ensure that the staff understand and are sensitive to the requirements and differences which varying cultural backgrounds bring. This extends the fundamental notion of visitor care and thus increases the quality of service.

Museum of Modern Art, New York
USA

Children's Museum, Boston
USA

Both of these sites have built a staff of volunteers or interns whose interests align with the aims, ethos and missions of the museums.

Children's Museum, Boston
USA

Here, primary school teachers take on the role of volunteer or interpreter which benefits both the teachers and the museum. It is beneficial for the teachers in developing experience and association with the world famous Children's Museum, and also extends the volunteer catchment for the museum.

State Railroad Museum, California
USA

All volunteers at the State Railroad Museum are interviewed by the Museum Educator and must complete some 60 hours of orientation and training as part of their induction. Extensive training is also provided for volunteers who work on the railway and in the Restoration Shop. Volunteers receive free museum membership, discount at the museum store, a subscription to the museum's quarterly publication and the opportunity to participate in social and educational programmes. Part-time paid employees are recruited from the local community. College students who are working on degrees in history or museum studies, and retired people with skills relevant to museum work are particularly sought after for temporary paid positions. Interns are used in the library, marketing, fund development, special event and administrative programmes. Most are graduate students who receive academic credit for their work.

Newseum, Washington DC
USA

This site utilises visiting reporters and media personnel who act as interpreters on an intermittent basis for the more interactive exhibits by hosting question and answer sessions on journalism and taking seminars on TV production.

Plymouth Plantation, Massachussets
USA

The Plymouth Plantation offers free attendance for local communities on certain days in order to build better community relations and encourage community volunteer numbers to increase.

Memorial, Caen
France

La Coupole, St Omer
France

In these visitor attractions, linguistic skills are particularly emphasised with some of the employees appointed being fluent in two or three languages.

Jurong Bird Park
Singapore

Approximately 3% of the park's operating budget is devoted to training and upskilling the site's 150 employees. This includes language training to enable better services for Japanese tourists who represent a substantial element of annual visitor numbers.

community and public sector intervention

community relationship initiatives

Key Findings

- Visitor attractions should encourage a close integration with the local community to ensure a sense of ownership and to maintain visitor numbers, particularly during the low season.
- The local community can be a major provider for the volunteer workforce of a visitor attraction.
- Educational establishments are an important means of building links with and support from communities.

Involving the community in the operation and decision making processes of a visitor attraction can be a key factor in its success, particularly where it depends on local support for funding and for off-season visitors. The sense of identity and ownership created between a successful cultural attraction and supporters from the local community can generate three main types of benefits.

First, the community actively promotes the product within and beyond the boundaries of the area resulting in an increase in visitor numbers. The enthusiasm of residents should also encourage visitors to the region to visit a visitor attraction and to stay longer. This can be particularly influential when the visitor may not originally have intended to make a visit. Thirdly, in the event of a crisis or a difficult period, a community committed to a visitor attraction can lobby support more effectively with local politicians and other likely public or private supporting organisations.

The level and need for public support varies from country to country but there are many examples of long standing community support in visitor attractions in France and the USA.

Old Sturbridge, Massachussets
USA

This visitor attraction recruits interpreters from the local community whilst also operating a number of initiatives to encourage community ownership. These include special ticketing arrangements for local families; using volunteers extensively with the incentive of allowing their families free entrance; as well as integrating on site events with the local traditional calendar.

New York Museums
USA

Museums throughout New York have specially programmed days with free admission to allow wider access to the whole community.

Futuroscope, Poitiers
France

In the early stage of this flagship development there was considerable opposition from local farmers. This was counteracted by management by involving them in the project and allowing them to benefit financially by selling their produce at Futuroscope thus guaranteeing local jobs.

Maihaugen Folk Museum, Lillehammer
Norway

This is an example of the gradual development of a folk museum which has been initiated and developed, over many years, by the local community. The community has donated a house, representing life in each decade of the 20th century, as part of a preservation programme of traditional Lillehammer houses and farm buildings. The community are also involved in the development of exhibitions as well as educational and events programmes.

Kings Landing Historical Settlement, Nova Scotia
Canada

Through volunteer programmes, this visitor attraction has encouraged the involvement of local children and community in the site.

State Railroad Museum, California
USA

Extensive use of volunteer enthusiasts brings the community of this traditional railway town together with their museum. Over 800 'docents' are available to be called upon to assist in operation of the attraction.

community relationship initiatives

Museum of Science, Boston
USA

The core mission of the museum is education. Access and outreach programmes to involve and bring the community on board are well developed. These include: Reports to the Community in their annual report; the School and Community Partnership Programme; Project MOST, Making the Most Out of School Time; the Greater Egleston Coalition and the Black Church Project. The museum also works proactively in disadvantaged areas using its own staff and teaching kits, allowing teachers and students to explore a topic targeted at specific high school grades and aspects of the science curriculum.

Lusto, The Finnish Forest Museum
Finland

Lusto has a close involvement with local schools and community in its activities through events, competitions and environmental and craft education. School leavers final projects are exhibited as a feature and they are issued with a local VIP card, permitting free entrance, to encourage them to bring visiting friends and relatives along.

public sector intervention

Key Findings

- There are wide variations between countries in terms of central and regional government support for the development of visitor attractions. France is an extreme example of strong public sector support, whilst the USA provides little or no public sector support.
- Developments in the USA are often funded by individual donation, bequest or community efforts rather than public sector intervention.
- In a number of countries, job creation is a key criteria for the justification of public funding and it is recognised that visitor attractions create a wider economic impact in other sectors in the surrounding area. Accommodation, transport and food are examples.

- There was only limited awareness of displacement as an issue in visitor attraction development and no evidence of any measures being taken to prevent it.

This research has demonstrated that there is a long standing tradition of public sector support for local and national cultural visitor attractions in France. Similarly in Singapore, Scandinavia, Germany and Ireland, there is recognition and acceptance of public funding for cultural attractions.

In contrast, in the USA, there is very little evidence of public money being invested in visitor attractions. The prevailing ideology is commitment to free-enterprise and market forces. In practice, however, the situation is rather different as many regional visitor attractions have been supported through endowment, donations and volunteer labour. Many small, local visitor attractions have been initiated and operated on the basis of 'community hope' rather than through any rigorous market analysis or commercial imperative.

Displacement was not apparent as a problem at a national level in any of the countries which were involved in the research, although there were some instances of concern by private sector operators on a regional basis following significant public sector investment in large visitor attractions.

Futuroscope, Poitiers
France

New Metropolis, Amsterdam
Netherlands

Significant amounts of public money was invested in the Futuroscope and New Metropolis projects by the regional authorities and revenue support is provided on an on-going basis. These sites are seen as a catalyst for regional economic development. Although there is little formal political resistance to such a high level of public sector involvement, small-scale private sector visitor attractions operators can sometimes be resentful of the competition which the public authorities have created for them.

Villedieu-les Poêles, Normandy
France

There has been a strong co-operation of small private sector operators for joint marketing in an attempt to counteract the potential displacement caused by neighbouring public sector owned sites.

quality assurance measures

Key Findings

- There is no evidence in any of the countries which were investigated of a grading classification scheme comparable to the Scottish Tourist Board's Quality Assurance Scheme for Visitor Attractions.
- The only apparent quality assurance measure which was identified was the level of visitation to each visitor attraction.
- There were some instances where the criteria for project funding for new projects was used as an inherent quality assurance measure.

Although there were no industry-wide or public sector regulated assurance schemes, there was some evidence of quality appraisal within parts of the visitor attraction sector. For example, the American Association of Museums offers accreditation of museums, including the criteria of interpretation.

Another aspect of quality appraisal in some countries is the evaluation of visitor attractions for public funding. In the USA, Canada and Ireland, funding criteria and peer review processes assure that only projects which meet a minimum set of criteria for quality receive project funding. However, this performance criteria may vary internationally and within different sectors. For example, the American National Endowment for Arts, which provides grant assistance to the arts, convenes expert panels to evaluate grant applications for visitor attractions. After the grant has been awarded, there is no post-project evaluation to assess to what extent the project's aims and goals were achieved.

Culture and Heritage Attractions
Canada

A recent roundtable discussion on cultural and heritage tourism identified the need for standards for visitor attractions in this sector. As a result, three levels of performance were identified, which are broken down into local, regional and national or international standards.

Visitor Attractions
Finland

Quality grading and classification does not exist at an official level in Finland. The view of the Finnish Tourist Board is that there is no need for this and it would require a large bureaucracy which they would have to administer.

Visitor Attractions
Denmark

This country operates a 'green key' measure of environmental performance for the hotel sector which has now been extended to incorporate visitor attractions.

Visitor Attractions
Netherlands

Although there is no formal grading system in the Netherlands, the public agencies use the level of visitation to visitor attractions as an inherent quality assurance measure.

American Association of Museums
USA

This organisation offers accreditation of museums, including the criteria of interpretation.

4 | visitor attractions at a glance

france

canada

singapore

united states of america

a snapshot of scotland

population	**5.1m**
area covered	**77,080 km^2**
no. of visitor attractions	**903**
public sector owned	**~40%**
free admission	**42%**
paid admission	**58%**
international visitors	**~17%**