

Museums: *Challenges for the 21st Century*

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Introduction

Since the 1970s, the Western industrialized world has witnessed an unprecedented museum "boom." This boom is both quantitative in terms of the numbers of new museums established and qualitative in terms of the place that museums now occupy in society. Besides fulfilling the traditional functions of acquiring, conserving and interpreting material culture, contemporary museums are cultural icons in their own right, defining urban landscapes, providing "symbolic value" for the expression of cultural life and giving incentives to the local economy (Kirchberg, 1998, p. 2).

This boom, though generally perceived positively, may also have adverse consequences as museums compete with one another for a limited market. Kirchberg (1998) notes that in Germany between 1991 and 1996 the number of museums increased by 30% but attendance increased by only 5%. In addition, for the active leisure and cultural participant, the increasing number of leisure options is not confined to museums. New venues and attractions compete for a consumer with less time to spare than ever before.

In spite of the buzz associated with the boom, the demand for museums in terms of attendance does not appear to be keeping pace.

The overall trend suggests that the museum sector is struggling to maintain its audiences.

In the United Kingdom, "Recent statistics show that visitor numbers to museums and galleries appear to be in trouble at a time when a host of new attractions are competing for attention" (Butler, 2000, p. 1). Scottish Tourist Board figures reveal a 15.6% drop in attendance at museums and galleries between May 1999 and May 2000, along with a 30% drop in visitor numbers at heritage sites. This same trend has been reported for English museums (Conybeare, 1994; Griffiths, 1998; Nightingale, 1999).

On the Continent, attendance at museums in West Germany declined by 9% between 1991 and 1996 (Kirchberg, 1998), while attendance at most culture and history museums in Denmark has dropped by 7% since 1996 (Anderson, 2000, p. 8). Visitor numbers at Italian museums declined markedly between January 1999 and January 2000; attendance was down 23.9% at the Uffizi in Florence, 15.5% at the Palatine Museum in Rome, 20.8% at the Baths of Caracalla and 15–20% at the Palazzo Ducale in Venice (Caton, 2000).

In the United States, though a 1997 National Endowment for the Arts survey reported that museum attendance increased from 41% in 1992 to 50% in 1997, there is uncertainty about whether the current boom

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in American museum attendance can be sustained. Critics point out that the total participation figure masks differences in attendance patterns among different types of museums. Attendance at American social history museums, for example, is not reflective of the overall boom (Lusaka and Strand, 1998, p. 60).

In Australia, the Australian Bureau of Statistics ([ABS], 1999a) reports that museum attendance declined 12% between 1991 and 1999.

The Environment of Museum Participation

Why is this happening? Why, when more money is being invested in establishing new museums with increasingly high public profiles, is attendance "flattening" or declining? To address this question, in 1999 the Powerhouse Museum, in conjunction with the School of Leisure, Sport and Tourism at the University of Technology, Sydney, embarked on a study of the nature of leisure in contemporary life and patterns of museum visitation.

This research project was the result of an environmental scan of recent literature, emergent questions and statistical trends. This exercise revealed that there is no simple answer to our question, but that a complex combination of factors are involved, including the profile of museum visitors, the impact of technology, use, competition, and apparently funda-

mental changes in leisure values and leisure participation.

Who Goes to Museums?

There is overwhelming evidence, substantiated by research across the globe, that a limited sector of the population regularly choose to visit museums (Bennett, 1995; Bourdieu, 1991; Hood, 1995). Most visitors to museums are well-educated, affluent and versed in deciphering the museum code.

Significantly, however, the increased number and heightened profile of museums over the last 30 years has coincided with the maturation of the post-war "baby boom" generation. This population phenomenon has witnessed unprecedented numbers of people who are affluent and educated at tertiary levels. The sheer size of this generation, accompanied by the requisite "cultural capital," is seen as creating an unprecedented demand for cultural services: "Part of the middle class, the part created as a consequence of the post-war baby boom, is the real player in this phenomenon. It is this social group, increasingly numerous, affluent, educated and urbanised, that expresses strong cultural demand" (Maggi, 1998, p. 4-5).

The question remains whether this will be a short-lived phenomenon. A combination of a declining birth rate throughout the Western industrialized world and the impact of ageing on the leisure patterns of the current generation is already having an effect on museum

ABSTRACT

In the past 20 years there has been an increase in the construction and development of museums throughout the Western world. However, this boom has not translated into an increase in the visitor base nor a diversification of the traditional visitor profile (marked by high income and a high level of education). Indeed the visitor base appears to be declining. At the same time, there have been shifts in leisure consumption and competition for leisure time. Additionally, changes in working patterns have resulted in much of the workforce experiencing time pressures, insecurity and an imbalance in the home/work split. This research undertaken in Australia focused on whether leisure patterns and consumption changed over a five-year period, how people now understand their leisure/work time, how people behave in choosing free-time activities within and outside the home, and ultimately what impact this may have on museums as they compete in the 21st century. The study tested postmodern theories of leisure, which suggest that contemporary leisure activities are increasingly fragmented and superficial and demand little commitment from the participant. This is juxtaposed to museums, modernist institutions that demand time, engagement and challenge.

KEYWORDS

Museums, leisure, competition, marketing, visitor studies

attendance. A National Endowment for the Arts report (1996) reveals that the decline in arts participation and museum attendance amongst the baby boom generation is partly attributable to the increased use of broadcast technology such as television, videocassettes, compact discs and computers.

In terms of museums, the question is the extent to which the combined effects of the ageing of baby boomers and the declining birth rate will affect future attendance.

Enter Technology

The impact of broadcast media and home-based entertainment on museum attendance among baby boomers encouraged us to widen the scope of the environmental scan to explore the potential impact of the technological revolution on museum attendance.

Computer ownership, Internet access and the availability of other home-based entertainment systems have grown exponentially over the last 20 years. Two issues interested the research team. The first was the ability of these systems to encourage domestically based leisure with a potential impact on museum attendance. Our scan revealed that more time spent on home computers may indeed result in less "going out." Statistics Canada reports that between 1986 and 1992 people spent one extra hour per day at home and that "the media can lead to reducing the cultural universe of spectators to the dimensions of the household, leading to social isolation and an increasing trend to individualised consumption" (Pronovost, 1998, p. 131).

The scan also raised questions about the impact of technology in terms of the ways in which an emerging generation may be expected to both access information and accord significance to objects.

The hierarchical, linear and narrative structures that characterize the ways in which information is presented in museums differ significantly from the networked information paradigm that computers now make available (Kenderdine, 1998). Moreover, as technology enables people to access more and more information across a wide variety of subjects, it is to be anticipated that the subject authority of the museum and its "transcendent voice" will be challenged (Maggi, 1998; Weil, 1997).

If the traditional role of the museum is to acquire and preserve objects, the collapse of physical space in this information-based paradigm may require museums to re-assess their relationship with objects and collections. In the very near future, the public could demand that museums serve a function that has more to do with interpretation than with the collection and conservation of objects. Information, rather than objects, may be the primary commodity of museums in the future (Anderson, 2000; Maggi, 1998).

The *virtuality* of experiences offered increasingly through the Internet is blurring the distinctions between what is authentic and what is real. Museums have traditionally been in the "authenticity" business, but the dichotomy between authenticity and virtuality may not be sustainable. This has important implications for museums that position themselves as offering authenticity through objects alone. "What

RÉSUMÉ

Depuis une vingtaine d'années, la construction et le rayonnement des musées sont à la hausse dans le monde occidental. Cependant, ce boom ne s'est pas traduit par une augmentation du nombre de visiteurs ni une diversification du profil classique de la clientèle (revenu élevé et haut niveau d'instruction). En réalité, la base de visiteurs semble en décroissance. Simultanément, on constate des changements dans la consommation des loisirs et une concurrence pour le temps qui leur est alloué. De plus, de nouvelles formes de travail ont entraîné des contraintes de temps, de l'insécurité et un déséquilibre dans le partage temps libre-travail. Cette étude effectuée en Australie a cherché à découvrir si les habitudes et la consommation de loisirs avaient changé en cinq ans, comment chacun conçoit dorénavant son temps de loisir/de travail, comment on choisit ses activités de loisir à domicile et à l'extérieur du foyer et, enfin, quel impact auront ces facteurs sur la place des musées au XXI^e siècle. L'étude analyse les théories postmodernes du loisir, selon lesquelles les activités de loisir sont de plus en plus fragmentées et superficielles et exigent peu d'engagement de la part du participant. Cette constatation est juxtaposée aux musées, institutions modernistes qui exigent du temps et un engagement, et représentent un défi.

MOTS CLÉS

Musées, loisirs, concurrence, marketing, études sur les visiteurs

it [virtual reality] offers is information, lots and lots of information, and a new, abstract kind of connectedness. What it asks in return is that we shift our allegiance from the physical world to the virtual one" (Hobson and Williams, 1997, p. 40).

The Study

The environmental scan had revealed that the areas for investigation were not straightforward. To focus and limit the study, the research partners concentrated on investigating changing leisure patterns within the context of postmodernism and cultural change. This in itself posed a number of challenges, to do not only with definitions but also with aspects of perception and reality of changing work patterns affecting leisure time and choice, new entrant leisure competitors, current consumer behaviour, and the role of the core values of museums within this complex scenario.

Leisure has been defined as "available" or residual time beyond the obligations of work and family. In the world of the 21st century, the boundaries between work and leisure are becoming diffused. Where leisure was once allocated to evenings, weekends and long annual breaks, the effects of economic globalization and economic rationalization have brought a change. With globalization comes the demand for business to operate around-

the-clock and throughout the year. The result is leisure grasped when available rather than relegated to specific and identifiable times (Caldwell, 1998; Gibson, 1999).

We wondered if there was evidence for the suggestion that more hours are being spent at work, and, importantly, we wished to explore the possible relationship between increased working hours and leisure choice (Jonson, 1998; Pronovost, 1998).

We also wanted to examine theoretical positions about postmodern leisure that identify a trend to "depthless" leisure characterized by fast-paced, ephemeral and entertaining experiences at the expense of intellectual ones (Rojek, 1995). The issue for the researchers was to determine whether there was evidence for this theoretical position and, if so, the impact on museum attendance.¹

Leisure in a Changing World

Leisure itself is a multifaceted concept, ever shifting, qualified and dependent on lifestyle, life stages and socio-economic factors. Overlaying this concept are "leftover" notions of our classic understanding of free time as something that "should" be used to make us "better people," our contemporary lived experience of time stress and overwhelming pressure, and our post-modern consciousness of a fast and fractured existence with multiple leisure choices, from the serious to the superficial.

Museums, once great modernist institutions seen to serve the public well under a model

RESUMEN

En los últimos 20 años se ha observado un aumento en la construcción y desarrollo de museos en todo el mundo occidental. Sin embargo, tal expansión no se ha visto acompañada de un incremento en la cantidad de visitantes ni de una diversificación en el perfil del visitante tradicional (caracterizado por un alto nivel de ingresos y de educación). Por el contrario, pareciera que la base de visitantes disminuye. Paralelamente, se han dado giros en los hábitos de consumo en materia de esparcimiento y en la competencia por el tiempo dedicado al esparcimiento. Además, los cambios en los patrones de trabajo hacen que gran parte de la población activa sufra la presión del tiempo, la inseguridad y un desequilibrio entre la vida privada y la actividad laboral. Esta investigación llevada a cabo en Australia buscó determinar si se produjeron cambios en los patrones de esparcimiento y su consumo en un período de cinco años, qué idea tiene la gente actualmente de su tiempo de esparcimiento y su tiempo de trabajo, cómo se comportan a la hora de elegir las actividades para el tiempo libre dentro y fuera del hogar y, en última instancia, cuál puede ser el efecto de estas conductas en los museos que compiten en el siglo XXI. En el estudio se examinaron las teorías posmodernas del esparcimiento, las cuales sugieren que las actividades contemporáneas de esparcimiento son cada vez más fragmentarias y superficiales y demandan escaso compromiso del participante. Esta visión se contrapone con los museos, instituciones modernas que exigen tiempo, compromiso, y desafío.

PALABRAS CLAVE

Museos, esparcimiento, competencia, marketing, estudios sobre visitantes

of public good, are now forced to compete in a client-focused environment of leisure consumption. The model of public good is slowly giving way to a model of culture as a commodity and an industry; museums, once the preserve of single narratives, are now being asked to provide – and to market – multiple narratives and multiple experiences for ever hungrier and more fickle leisure consumers.

These two parallel assumptions – changing patterns of leisure and museums unsure and self-reflective of their once secure position – informed the foundation of our research project, *Leisure and Change: Implications for Museums in the 21st Century*.

Overall, the methodological approach took two distinct but ultimately convergent directions. One concentrated on analysing secondary sources in terms of the emerging theories on postmodern leisure, changes in museum growth and visitor expectations, and the extent to which these assumptions and theories can be substantiated by existing statistical data. The other focused on our own primary qualitative and quantitative research investigating further these theories and assumptions.

Secondary Research Findings

Chris Rojek (1993, 1995, 2000) is one of the most prolific writers and theorists on the nature of contemporary leisure and cultural consequence.

For Rojek, a postmodern leisure condition is one that is marked by distraction rather than immersion, indifference to the authentic but a curiosity about the simulated or the fake, short-lived intense social interaction, an ever accelerating pace of life, and an ambivalent and contradictory view of risk and contingency in a world that is seen as beyond the control of the individual (1993). Rojek suggests that these patterns of leisure engagement are still speculative and the boundaries of what might be considered modern and what might be considered postmodern are blurred. We are modern and postmodern at the same time, carrying baggage backward and forward and unpacking it as the context demands (1993).

Rojek also maintains that our notion of leisure is caught between two extremes. On the one hand, theorists such as Stebbins suggest that serious leisure – that which can improve

the well-being, life chances and social interaction of the individual and community – is still preferable to leisure that is time-wasting, non-productive, anti-social and disengaged (Rojek, 2000).

In this paradigm, where might museums position themselves between serious leisure and casual leisure, between the modern and the postmodern?

If these scenarios are not either/or – serious leisure is not always self-actualizing; casual leisure is not always meaningless – the context in which leisure takes place has been influenced by three fundamental conditions: the notion of “free time,” its perceived oppositional nature to work, and the pace and take-up of technological change.

Our research, informed by different, complex and contradictory theories on the nature of leisure, concentrated on understanding the practice of leisure within the confines of time, work and technology.

We believed that investigating people’s practice of leisure and the constraints on leisure would give us some insight into how we might theorize leisure and what impact this would have on one leisure industry – museums.

Time

The Australian Bureau of Statistics defines free time as “time allocated to social and community interaction and recreation and leisure” (Australian Bureau of Statistics [ABS], 1998a). This definition implies that there is a rational choice on the part of the individual to “allocate time” to do something, or even to allocate time to do nothing. It falls outside the notion of casual or anti-social leisure described by Rojek, and consequently could be described as “acceptable use of time.”

Because of inconsistent data-gathering by the ABS, it is not possible to say that free time has increased or decreased over a period of time or along gender/life cycle lines.

In his comparison of average free time availability, Bittman (1999) concludes that there has been an overall increase in free time for both women and men (p. 370–371).

It is difficult to draw any conclusions from the data in Table 1 alone. In order to state for certain that free time is decreasing for women but increasing for men, we would have to examine other indicators in conjunction with

this one. These could include the increase in early retirement for men, increase in paid work (full-time, part-time and casual) for women, re-structuring of traditionally male-dominated industries, and increased competition in some industries as a result of globalization and new industry/new economy entrants. Bittman warns that these trends can be cyclical and subject to economic booms and busts, which influence work-time pressure on those in the workforce.

Year	Men	Women
1974	35.39	32.41
1987	33.04	31.86
1992	35.57	36.58
1997	38.26	35.46

Source: Bittman, 1999, p. 370

The figures presented in Table 1 become more interesting when we overlay them with reports of "feeling time pressure," a more subjective measure than the quantitative time diary record. In 1998, the ABS (1998a) recorded for the first time the nature of perceived time pressure on life cycle. The findings were:

- Fifty-three percent of members of a couple with dependent children always or often felt pressed for time.
- Thirty-seven percent of couples with non-dependent children always or often felt pressed for time.
- Twenty-five percent of those without children always or often felt pressed for time.
- Forty-one percent of lone parents always or often felt pressed for time.

Because there are no earlier statistical data in this area, we are unable to state that these figures reflect perceptions of increasing time deficit or surplus. However, they tend to reinforce Bittman's findings of the extreme time-poor (middle-aged working parents) and the extreme time-rich. Of significance in these figures is the 41% of lone parents feeling pressed for time, compared to 53% of parents with partners.

If this differentiation of free time is all that is available to us, what do people do with their free time?

A comparison of time-use data (ABS, 1998a) for the years 1992 and 1997 reveals the following trends:

- decreased time spent on recreational pursuits in general in 1997
- decreased time spent on sport participation in 1997
- decreased time spent on audiovisual media in 1997 (although four out of every five minutes of passive recreation was still spent watching TV or listening to CDs/radio)
- decreased time spent talking in 1997 (although women spent more time than men talking and participating in crafts and handiwork activities, while men spent more time than women on computers).

Museum attendance has been steadily decreasing over the past decade. There was a dramatic drop between 1995 (attendance rate: 27.8%) and 1999 (19.9%) (ABS, 1999a).

It is interesting to compare these data with those from the national *Recreation Participation Survey* for 1986 and 1991 (the last time recorded) (Department of Sport, Recreation and Tourism, 1986; Department of Arts, Sport, the Environment, Tourism and Territories, 1991). The figures suggest that visits to museums and galleries were decreasing, while socializing at home, engaging in computer activities and, in particular, shopping were all on the increase – although we should bear in mind the seasonality of some activities and the different methods of gathering data.

Leisure activities that showed increases were shopping (which began to be monitored in 1993), restaurant dining, house maintenance and cinema attendance.

Indeed cinema has been the big winner in attracting audiences. In the past 10 years cinema attendance has increased by a staggering 290%. In 1987 it attracted annual admissions of 30.8 million; in 1999 this figure had risen to 88 million (Australian Film Institute [AFI], 2000). Suffering a dramatic decline in attendance primarily as a result of new entrants (videocassette recorders) in the 1980s, cinemas reinvented themselves. The result is that cinema attendance has now become the most popular leisure activity, cutting across socio-economic factors and life cycles, although there

is a clear indication that women and young people are the most frequent attendees (AFI, 1998).

Technology

The newest of new entrants is the Internet and digital technology. It is unclear at this stage what the Internet is replacing as it gathers momentum, taking up residence in more and more homes and becoming indispensable in the workplace. However, a recent study in the United States found that Internet usage is encroaching on social time, replacing old media with new media (60% of respondents who were frequent Internet users reported a decrease in television viewing time), encouraging people to spend more time at work and to work longer at home and to spend less time shopping in stores and commuting. Almost 43% of US households have Internet access (Nie and Erbring, 2000). The most frequent use of the Internet is for e-mail (90%). In Australia the pattern is repeated. Household access to the Internet increased from 14% of all households in May 1998 to 37% of all households in November 2000.

Work

Almost everyone in the workforce believes that they are working more now than in the past, and yet this perception is not borne out by the statistics. What does appear to be happening is a restructuring of a number of key industries, resulting in increasing casualization² of the male workforce (although women are more casualized than men), a growing perception of insecurity, and the need to work longer in either a paid or unpaid capacity (ABS, 1997, 1998a, 1998b, 1999b).

Even though working hours have decreased over the past century in industrialized nations, there is some evidence that employees are working more than 45 hours per week, taking fewer holidays and feeling increasingly dissatisfied with the homelife/worklife split (Yann Campbell Hoare Wheeler, 1999).

In a survey commissioned by the Australian Council of Trade Unions (ACTU), 55% of respondents worked more than 40 hours per week, with 26% putting in more than 45 hours and 12% more than 50 hours. Only one third reported overtime payment for additional hours worked. Almost one half felt that

health problems had arisen because of the increased working hours. Less than half (44%) indicated that they were happy with the balance between work time and family time.

The results of the ACTU survey reinforce the International Labour Organization belief, reported by Bittman and Rice, that the new flexibility demanded by industries "results in a maldistribution of working hours...[generating] still more unemployment, increasing precarious employment" (1999, p. 3). It also reinforces Schor's premise, in *The Overworked American*, that "the link between economic progress and leisure time in highly industrial societies... [has led] to a decline in leisure and that extra productivity has been wasted in an insidious cycle of work-and-spend" (cited in Bittman and Rice, 1999, p. 4).

This overall view of time availability and the choices people make in using that time indicates that, on balance, the less engaged, more simulated and immediately gratifying activities are the winners. There is a perception that some segments of the population are feeling pressed for time and that the pace of work and life is spiralling out of control. This trend has been developing over time and is in keeping with the elements that describe a post-modern condition. Yet at this stage it is still only "facts and figures." Our primary research attempted to throw more light onto this condition and the free time/leisure choices that people make as a result.

Primary Research Methodology and Findings

When we progressed to the primary research stage, the questions we were interested in exploring were:

- Do people have more or less leisure time now than they did five years ago?
- To what do they attribute this change?
- In terms of leisure activities, what do they do more of now compared with five years ago?
- In terms of home-based leisure activities, what do they do more of now?
- Are there more leisure activities available to them now than there were five years ago?
- Are they spending more on leisure than they did five years ago?
- Do they think of museums as places to go for leisure, and under what circumstances

do they visit museums, if at all (holidays, only went at school, only went with parents)?

Environmetrics, a Sydney-based consultancy, worked in collaboration with the research team on administering the qualitative and quantitative aspects of the research, developing guidelines for focus-group discussions and refining our questions for an Australian capital-city Omnibus survey. Both quantitative and qualitative aspects of the research captured attitudes and information from visitors and non-visitors to museums.

Four focus groups were formed: two groups of young people (aged 20–24), one “museum active” and one “museum non-active”; and two groups of older/middle-aged people (35–45), one “museum active” and one “museum non-active.”

On the basis of the results of these focus-group discussions, a series of questions was developed and administered to 1,100 adults as part of an Omnibus survey in five Australian cities: Sydney, Melbourne, Brisbane, Adelaide and Perth.

Patterns emerging from the qualitative data

Although we expected leisure patterns and time availability to be influenced by life-cycle stages, there were surprising elements, reinforcing many of the assumptions about the contemporary postmodern/modern split. The most striking were:

– A perception that more leisure activities are available to people now than previously and that this change has increased the pace of life. Areas of increased activity cited by participants were restaurants, performing arts productions and venues, festivals and other events, and movies. In addition, participants felt that they had increased their leisure spending and that leisure had become more commodified.

– While some people embraced this range of choice, indeed doubling up on a number of leisure activities to fit them in, others felt overwhelmed and longed for the days of less choice – they were “lost in leisure.”

– Notions that leisure has to be earned and that time has to be filled: *[If] I have a day off, I can't waste that day – I plan a number of activities* (female youth); *We are addicted to being busy* (female non-museum visitor); *I can't go to the beach if I know there is a chore to do – some-*

times I feel I have to set myself a chore...I feel guilty if I don't do something (female youth).

– A blurring of leisure, work and obligation time. Many felt that work encroached on weekends and doubled up on activities, with entertaining clients as both a work and a leisure activity. Some felt that they were investing in work now to collect leisure later in life.

– Use of the Internet was increasing but there was no perception that it was a substitute for an activity; rather, it was seen as a tool for communicating with friends and family. Of those who spent considerable time on the Internet, there was a perception that this time replaced that spent sleeping, using the telephone, watching television, reading and doing household chores.

– Most participants felt they were working longer hours now than five years ago, although some men had made a deliberate choice to downscale work in order to spend more time with family. In most instances, participants were positive about their work, describing it as *challenging, productive, stimulating, fun, rewarding* and *people interactive*. Negative associations included *necessity, stressful, enjoy it but wish it would slow down, draining, repetitive* and *out of control*.

– Young non-museumgoers felt that going to a museum was something you did at school or over the age of 40. *Once you've been to a museum, you've seen it* (young male). Older non-museumgoers liked the idea of museums but did not think there was anything there for them. Still others indicated that their children were not interested in going and that they perceived museumgoing as expensive. They did not want to take a risk with their leisure time doing something that they would not like or that would be too expensive.

– Young museumgoers perceived museums as one activity among many they were involved with. They felt that they would remain loyal to museum visiting but that this pursuit required effort. Those with children were likely to take them to museum exhibitions for fun as well as out of duty and felt that over the past 10 years museums have become better designed and more *user friendly*.

Patterns emerging from the quantitative data

The most popular activity among the surveyed population was cinema attendance, with 79%

attending in the last 12 months. This is a higher attendance rate than the national average of just over 62% (ABS, 1997). Attendance at a sporting event came in at 51% (national average: 44%). Museum attendance rated 33% (28% in 1997 and 19% in 1999).

In relation to leisure time, the findings were:

- Compared to five years ago, 51% had less time, 31% had more time and 11% had about the same amount of time.

- Younger people were inclined to report that they had less time, those over 50 to have the same amount of time.

- Changes in availability of time were primarily to do with changes in working hours, followed by family obligations, rather than increases in leisure choice.

- The leisure activity reported as increasing most compared to five years ago was eating out (56%), followed by movies (43%), pub/clubs (35%), sporting events (27%), live theatre (21%), theme parks (16%), art galleries (16%) and museums (13%). The vast majority of respondents believed they did more of at least one activity now than five years ago (80%).

- The home-based leisure activity reported as increasing most was reading (60%), followed by gardening (55%), entertaining (46%), watching free-to-air TV (39%), watching videos (37%), using computers (36%), doing nothing (22%) and watching pay TV (21%).

- Respondents who increased their museum-going also increased their pub/clubgoing and home-based leisure.

- Respondents who reported more leisure time were more engaged with cultural activities when going out and more likely to switch off or do nothing when at home.

- Respondents who reported less leisure time added only theme park visitation to their repertoire and increased their home activity in the areas of entertainment, computers and pay TV.

- Seventy-three percent of respondents felt that there were more leisure activities available now than five years ago; just under 40% felt that their spending on leisure had increased over the five-year period.

- Thirty-four percent of respondents did not include museumgoing on their list of possible leisure activities, while 31% went to

museums only when at school. Fifty-two percent reported that they usually visited museums while on holiday and reported an increase in this activity over the five-year period. Those who as children had been taken to museums and galleries by their parents were more likely to visit as adults and had increased their visitation over the five-year period.

Outcomes

In the light of the findings from this study, museums face both long-term and short-term challenges. In the longer term, museums will be compelled to consider their role in a post-modern society and key issues, including:

- How do museums define their core business at the beginning of the 21st century?

- Is this core business of museums sustainable within the context of the changing values of the 21st century?

- How will the changing values of society impact on the core business of museums?

- In the short term, museums face immediate concerns related to positioning museums in the context of competition and changing leisure patterns, and capitalizing on motivation to visit.

The remainder of this paper addresses both the long-term role of the museum within postmodern society and the immediate issues facing museums – strategic positioning and survival in the competitive leisure industry.

Museums in the 21st century

Museums are products of modernity and their development is deeply implicated in the formation of the nation state. But modernism is ending with the new millennium, and with it go many of modernism's key values of stability and permanence, authenticity, grand narratives and even history itself. In a postmodern world, what are museums and what should their role be?

In many ways, the position of museums today is contradictory and ambivalent. On the one hand, they retain many of their traditional distinctive features – their authoritative and legitimizing status, their role as symbol of community, their "sitedness," the centrality that they give to material culture, the durability and solidity of objects, the non-verbal nature of many of their messages, and the fact that audiences enter and move within them

(MacDonald, 1996). On the other hand, they are challenged by new information technologies, increasingly mobile and heterogeneous communities, and the demand for contemporary programs that demonstrate usefulness and "relevance."

Within this volatile and changing environment, the final quarter of the 20th century witnessed a dramatic alteration in the relationship of the museum with its public. From a position of unquestioned subject authority and moral superiority in which the museum's role was to variously raise the level of and morally elevate public understanding and refine taste and sensibility, the museum of the late 20th century began to redefine its relationship with its public within principles of increasing equality and democratization.

Critical to the redefining of this relationship were several factors: the emergence of a highly discerning and educated public contiguous with the baby-boom generation; the development of a consumer- and customer-oriented society, and the integration of principles of customer service into the public sector beginning in the early 1990s; the conceptualization of a "new" museology in which the visitor is recognized as bringing a living reality to the museum experience rather than the morally and intellectually blank slate assumed by museums in the late 19th and early 20th centuries; the establishment of principles of institutional accountability for public spending; and the general decline in respect for institutions of authority, public office and professional expertise (Bennett, 1995; Weil, 1997).

All of these factors in combination have required the museum to reflect upon and reconsider the terms under which it relates to its public.

It is this redefining of relationship that is at the core of what the museum in a post-modern world may become. In this respect, there is some convergence in thinking. Elaine Huemann Gurian (1996) envisages that museums will increasingly have a role as sites of "safe congregant behaviour" where communities can confront, debate and exchange ideas in one of the few remaining secure public forums, and Weil (1997, p. 260) sees the museum reinventing itself to become a centre "available to its supporting community to be used in pursuit of its communal goals." This rein-

vention will further alter the power relationship between the authority of the museum and the public. In the near future, he predicts, "it will primarily be the public" who will make the decisions.

The increasing focus on the public also impacts on the ways in which museums are using audience research to inform marketing and positioning. The museum of the 21st century will be taking account of the changing patterns of leisure participation and behaviour evident in the outcomes of this study.

Consumer patterns

Respondents in all of the focus groups spoke of an increased pace of life in general: *I can't relax like I used to; there is no down time; [I feel pressure to] do more.* This increased pace of life, combined with a perception of less time in which to undertake an increasing array of leisure options, is creating new consumer patterns. In many ways these new consumer patterns are a response to coping with the phenomenon of *more* to do and *less* time in which to do it.

Six consumer patterns were identified from the qualitative research, reflecting the range of individual responses to the phenomenon of doing more at a faster pace and in less time.

Leisure **achievers** cope with the situation through careful planning and good organization of the time available. They are thus able to experience a wide range of activities across the leisure spectrum and are willing to undertake activities alone in order to fit in as much as possible.

Others **double up** by choosing activities that address several experiences in one. These are people who listen to a band at a pub while having a drink with friends or who combine attendance at a concert with proximity to a new and untried restaurant.

While the achievers and the doublers are both characterized by an element of planning, **spontaneous** consumers do not plan at all. These people, identified as an emerging consumer phenomenon (Caldwell, 1998), respond to the moment and will choose to do what is on hand when time becomes available. They are generally people in demanding professional jobs that leave them "time poor" and prone to making immediate decisions about where they will go that day and what they will do.

There are two other groups that are dependent on external structure and therefore behave more reactively in their patterns of leisure choice. These are the **peer driven**, whose leisure choices are determined by the decisions of others, and the **frustrated**, who find it difficult to cope with the multitude of choices available and who seek situations where the decisions are made for them. These are the people who will respond favourably to a leisure experience that is packaged.

Finally, families have their own distinct reactions to the current leisure situation. Though parents sacrifice their own leisure time to facilitate the leisure needs of their children (driving them to sporting activities, dropping them off at parties, arranging for them to go to holiday camps, etc.), this same emphasis on generation-specific leisure activities results in **structured family** leisure patterns. Parents experience difficulty organizing whole-family leisure activities.

An additional factor is the ingredient of money. Both the qualitative and the quantitative stages of the study revealed that people are spending more money on leisure activities than they did five years ago. Families, in particular, cite the increased cost of new forms of leisure such as home computers and pay TV, and the difficulty of interesting children in less expensive leisure pursuits such as going to the beach, having family picnics, going for a walk and visiting museums.

The study suggests that museums need to take the following into account in their marketing plans:

- Museums offer value for money at a time when leisure is perceived to be increasingly expensive.
- For families, museums offer value for money and a location for needed family time.
- Promotions need to be customized to take account of different leisure consumption patterns.
- In a fast-paced world, people are seeking leisure packages that enable them to undertake several activities within a short space of time.

Leisure positioning

It is evident that perceptual factors may create barriers to museum participation. The attributes associated with museums differ from those related to the ideal leisure attraction.

Museums are perceived to be in a different field of activity to leisure. The fact that this museum "field" is an intellectual and educational experience, requiring some of the mental engagement and commitment that is becoming less attractive in today's world, may be a further deterrent.

Moreover, the attributes associated with museums explain to some extent the reason why museums consistently appeal to a subset of the population rather than the population at large. Overall, museumgoers represent a highly educated sector of the population. Familiarity with the museum code is intrinsically linked with class and educational structures (Bennett, 1995; Bourdieu, 1991). Those who have been socialized into museumgoing at an early age tend to seek an educative element in many of their other leisure experiences as well (Hood, 1995).

Interestingly, many museums could legitimately argue that they are offering what the general leisure consumer is seeking. Museums are *fun*, they are *exciting*, they are *good places to take the family*, and they offer *great value for money*. However, it appears that museums are failing to capitalize on and claim these attributes to demonstrate the valid synergy between what consumers want and what museums have to offer. Museums have the opportunity to include in their branding not only the attributes that they meaningfully own, but also the attributes associated with an ideal leisure experience.

In positioning, therefore, there appear to be two issues to consider. If museums are to increase attendance, they need to position themselves as attractions with many of the attributes associated with the "ideal" leisure activity. And museums need to promote themselves as the owners of another set of attributes that are unique to museums.

What makes a museum special?

Museums are what is known in marketing terms as *values* brands. Corporate brands and product brands are familiar. A values brand has an enduring core purpose, which creates a long-term bond with those sectors of the population that share the same values (Kiely and Halliday, 1999). Moreover, there is a desire for a lasting future of the brand because of customer allegiance to the brand's underlying values.

Importantly, museums offer more than the short-term experience of a visit. They are valued because they are institutions that contribute to social value. The museum "incorporates not only objects but, more importantly, the intellectual heritage, the history, values and traditions of society; it also emphasises continuity by suggesting the requirements to preserve what is valued from previous generations so that this may be inherited by the descendants of present members of society" (Department of Finance, 1989, p. 24).

What museums offer differentiates and distinguishes them from the ephemeral, the transient and the depthless. What museums need to celebrate, advocate and promote is their role as catalyst for building social value.

Authenticity

A further distinguishing characteristic of the museum experience is authenticity. We were interested in whether the increasing penetration of simulated experiences and information technology into people's daily lives is compromising notions of what is "real" to the extent of devaluing the authentic experience of the museum.

The results of the present study are somewhat hopeful in this regard. Though penetration of computer use was high and use of the Internet was increasing, the qualitative research indicated that virtual experiences were not yet perceived to be an acceptable substitute for the authentic experience that museums offer.

However, simulation and virtual reality may emerge as potent competitors, affecting museums' relationship to their publics in fundamental ways. The potential impact of virtual versus real remains an unknown but vexing question. It may be that, in a postmodern world, "Authentic and unauthentic experiences are no longer placed in contradiction to each other. Indeed the search for the authentic has, in the late twentieth century, become increasingly irrelevant if not abandoned. The authentic has disappeared" (Jonson, 1998, p. 4).

Conclusion

In the emerging leisure environment of the 21st century, museums face a challenge. Less time and more to do serve to put pres-

sure on consumers. New leisure activities that offer novelty and difference test loyalty to the established and the known. A trend to ephemeral and depthless pastimes is juxtaposed with choices that require intellectual engagement. What can museums do to ensure a place in this new, postmodern world?

In our research, visitors and non-visitors may have all agreed that museums were in general a "good thing" – who would necessarily be against museums or motherhood? When it comes to acting on those beliefs, however, a different picture emerges. They do not really believe that museums are places where they will find fun, excitement, or even necessarily emotional or spiritual fulfilment. Many people now believe that other parts of the environment fulfil that aspect of their being. When they search for meaning, they commune with nature as an antidote to the highly consumerist fast-paced lifestyle most embrace.

Our further research is leading us into an exploration of the mind of the consumer: how consumers make choices about leisure and where (even if) museums surface on the landscape of leisure choice. It is our belief that we can begin to reposition museums more meaningfully if we understand in more depth the factors involved in making decisions about leisure. This is not to place in jeopardy the core values of museums in research, scholarship and education, but rather to better understand what value the consumer gives to the sharp end of these core functions: the exhibitions, experiences and environments that are the public face of the museum industry.

Notes

1. That there was some initial evidence for this trend came from a separate research study undertaken at the Powerhouse Museum in Sydney (Boomerang! 1998).
2. Casualization is defined as work that is characterized as non-permanent, contract, temporary or part-time.

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