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Atıf Künyesi | Citation Info

Aliyeva, G. (2025). The Methods For Evaluating the Activities of Museums. *Akademik Tarih ve Düşünce Dergisi*, 12 (3), 969-980.

The Methods For Evaluating the Activities of Museums

Abstract

This article explores the methods used to evaluate the performance of museums. Museums play a significant role in public and cultural life through their social and educational functions, and the objective assessment of their performance is essential both for state policy and museum management. The article analyzes the main evaluation methods, including both qualitative and quantitative approaches, and examines the applicability of indicator systems based on international practices. The research employs both statistical analysis and expert evaluation methods. The results show that systematic and objective evaluation mechanisms can contribute to enhancing museum efficiency and developing strategic growth plans.

Keywords: Museum Management, Performance Evaluation, Quality Indicators, Indicator Systems, Efficiency, Research Methods, Cultural Heritage

Müzelerin Faaliyetlerini Değerlendirme Yöntemleri

Öz

Bu makale, müzelerin performansını değerlendirmek için kullanılan yöntemleri incelemektedir. Müzeler, sosyal ve eğitsel işlevleriyle kamusal ve kültürel yaşamda önemli bir rol oynamaktadır ve performanslarının objektif bir şekilde değerlendirilmesi hem devlet politikası hem de müze yönetimi için gereklidir. Bu makale, hem nitel hem de nicel yaklaşımları içeren temel değerlendirme yöntemlerini analiz etmekte ve uluslararası uygulamalara dayanan gösterge sistemlerinin uygulanabilirliğini incelemektedir. Araştırmada hem istatistiksel analiz hem de uzman değerlendirme yöntemleri kullanılmıştır. Sonuçlar, sistematik ve objektif değerlendirme mekanizmalarının müze verimliliğinin artırılmasına ve stratejik büyüme planlarının geliştirilmesine katkıda bulunabileceğini göstermektedir.



Anahtar Kelimeler: *Müze Yönetimi, Performans Değerlendirme, Kalite Göstergeleri, Gösterge Sistemleri, Verimlilik, Araştırma Yöntemleri, Kültürel Miras*

Introduction

Museums are social institutions with multifaceted functions such as preserving cultural heritage, promoting public education, and shaping aesthetic appreciation. Over time, their roles have expanded significantly, playing an important part in social integration, education, and tourism. As a result, the need for a systematic and objective evaluation of museum activities has become increasingly urgent. Evaluation is not merely a measurement of outcomes but a critical process that reflects how those outcomes influence management and policy.

Museums are not merely spaces where exhibits are displayed; they are also institutions that preserve the cultural memory of society and serve educational and research purposes. The outcomes of their activities have a direct impact on the cultural level of the public, tourism, and educational processes. However, the lack of unified and systematic approaches to evaluating museum activities, especially in developing countries, leads to challenges in museum management. Therefore, the application of modern evaluation models, the development of effective indicator systems, and their practical implementation have become highly relevant. Which methods and approaches are more effective for evaluating the activities of museums? Which international practices can be adapted to the context of Azerbaijan? How should objective and subjective criteria be balanced during the evaluation process? The following methods were used in the research:

- *Literature Review – Analysis of methods based on international experience
- *Quantitative Analysis – Examination of statistical indicators of museums (Ismayilov & Bayramova, 2022b).
- *Expert Surveys – Interviews with museum specialists
- *Comparative Analysis – Comparison of evaluation systems in different countries (Balginova, Maydangalieva, Satygalieva & Mahammadli, 2018);
- *SWOT Analysis – Assessment of the strengths and weaknesses of local museums (Bayramov & Məhəmmədli 2025).

In many countries, including Azerbaijan, museums are funded by state or municipal budgets, which necessitates the presentation of their performance in an accountable manner to both the public and decision-making bodies (Heydar, 2023). However, the absence of unified evaluation mechanisms, the inaccuracy of indicator systems, and the weakness of institutional frameworks remain major obstacles in meeting this need. The aim of this article is to examine

the main methods and approaches used in the evaluation of museum activities, analyze their effectiveness, and offer recommendations applicable to the Azerbaijani context.

1. The Main Part

The evaluation of museum activities has become a widely discussed topic over the past decades, particularly in Western countries (İsmayilov, İsmayilov & Mammadova, 2019). Various researchers have proposed different approaches to this process. Some have based evaluation primarily on quantitative indicators—such as the number of visitors, revenue, and number of exhibitions—while others have emphasized qualitative aspects, such as social impact, educational function, audience satisfaction, and social inclusivity.

Certain scholars argue that evaluation in museum management should not be limited to outcome measurement alone, but should also be integrated into strategic planning (İsmayilov, 2022). For instance, highlight the challenges of measuring cultural impact and advocate for the development of methods that focus more on social effects.

International organizations such as UNESCO and ICOM (the International Council of Museums) have also developed documents and methodologies aimed at defining performance indicators and standardizing evaluation criteria for museums (İsmayilov & Khalafova, 2023). For example, ICOM's guidelines propose various indicators for assessing the public and educational functions of museums.

The Balanced Scorecard (BSC) and Key Performance Indicators (KPI) approaches, widely applied in the United Kingdom and Scandinavian countries, enable a more balanced evaluation of museum activities (İsmayilov, Mahammadli & Gasimli, 2023a). These approaches consider not only financial indicators but also aspects such as internal processes, learning and development potential, social value, and customer (visitor) satisfaction.

In this regard, analyses show that the integration of both quantitative and qualitative approaches is essential for modern museum management. However, in the context of Azerbaijan, there is a noticeable lack of research on how this integration can be effectively implemented (İsmayilov, Mahammadli & Khudiyeva, 2022). The evaluation of museum activities is based on various methods, which are generally grouped into two main categories: quantitative and qualitative indicators. Each of these reflects specific aspects of museum operations (İsmayilov & Aliyeva, 2023). To achieve optimal results, these two approaches should be applied in a complementary manner.

**Quantitative Indicators*

Quantitative indicators provide measurable, statistical, and objective data about the museum's activities (Ismayilov & Khalafova, 2022b). These indicators serve as fundamental tools for management reporting and monitoring.

**Number of Visitors*

Visitor flow is a key indicator of the museum's connection with society. This includes considerations such as:

- Annual, monthly, and daily visitor numbers
- Visitor statistics based on exhibitions and events
- Rate of repeat visits (Ismayilov & Khudiyeva, 2023);
- Ratio of local to foreign visitors

**Revenue and Financial Indicators*

The financial stability of museums plays an important role in evaluation:

- Income from ticket sales
- Payments received from events and exhibitions
- Sponsorships and donor contributions (İsmayilov & Məhəmmədli, 2024);
- Volume of extrabudgetary funds
- Ratio of expenses to income (financial efficiency)

**Number of Events and Programs*

Indicators reflecting the scope of the museum's activities:

- Number of exhibitions and events held annually
- Number of educational programs and seminars (Ismayilov, Mahammadli & Gasimli, 2023b).
- Participation in regional and international projects

Number and Movement of Exhibits in the Collection:

- Number of exhibits added to the museum collection
- Cultural artifacts restored and researched
- Number of digitized exhibits (Mammadov, 2022a).

**Qualitative Indicators*

Qualitative indicators are mostly based on subjective, social, and psychological aspects and allow the assessment of a museum's public functions, its role in social integration, and educational impact (Karabalina, Maydangalieva, Satygaliyeva, Ahmetalina & Mahammadli, 2018).

**Visitor Satisfaction*

The main indicator measuring the quality of museum services:

- Satisfaction level measured through surveys
- Visitors' feedback on exhibition design and accessibility of information
- Level of interactivity of the exhibitions (Kazimi & Mahammadli, 2021);
- Staff attitude and quality of service

**Educational and Enlightenment Impact*

Indicators measuring the museum's role in teaching and training:

- Quality of programs involving students and pupils
- Level of cooperation with schools (Kenzhebayeva, Urmurzina & Mahammadli, 2018).
- Training sessions for teachers and experts
- Interactive programs designed for children and adolescents

**Social Inclusivity and Accessibility*

Reflects the museum's ability to serve various social groups:

- Availability of infrastructure for people with disabilities (Mammadov, 2022b).
- Programs for migrants, ethnic minorities, and the elderly (Kenzhebayeva, Urmurzina & Mahammadli, 2018).
- Exhibitions adapted for families and children

**Digital Transformation and Technology*

- Availability of virtual tour options (Khalafova & Ismailov, 2024);
- Accessibility of online resources and digital archives
- Activity on social media and statistics of the digital audience (Kushzhanov & Dashgin, 2019a).

**Scientific Research and Publications*

- Number of scientific articles and monographs produced by the museum and its staff (Mammadov, 2013);
- Participation in international and local conferences (Kushzhanov & Mahammadli, 2019b);
- Exhibitions prepared based on research findings

Expert Evaluation is an assessment method based on the subjective, yet scientifically grounded opinions of specialists regarding the quality of museum activities (Mahammadli, 2018). This approach allows for an in-depth and comprehensive analysis of various aspects of museum operations—such as organizational management, exhibition policies, educational activities, social impact, and innovation potential (Qasımlı & Məhəmmədli, 2024a).

**Main Objectives of Expert Evaluation*

- Identify the strengths and weaknesses of museum activities
- Provide scientifically grounded recommendations for strategic development
- Ensure an objective perspective in the decision-making process (Mahammadi, 2024);
- Offer professional support in interpreting obtained statistical results

**How is the Expert Group Formed?*

Experts selected for evaluation typically specialize in the following fields:

- Scholars in museology and cultural heritage
- Museum directors and practitioners (Məhəmmədli, 2024);
- Professionals in art and history
- Specialists in education and public relations
- Representatives from government and non-governmental organizations involved in cultural policy

The number of experts usually ranges between 5 and 10, ensuring a balanced and multifaceted approach.

**Expert Evaluation Methods*

- Surveys and scoring systems
- Focus groups (expert discussions) (Muhammadli, 2023);
- Interviews and analytical reports
- Field visits and observations

**Analysis of Expert Opinions*

Collected expert opinions are systematized, average scores are calculated, and results are presented graphically. Additionally, the recommendations provided by experts are separately recorded and incorporated into the improvement plan (Nadir & Sevda, 2022);

**Advantages and Limitations*

Advantages:

- In-depth and contextual analysis
- Objective evaluation of the real situation (Qasımlı & Məhəmmədli, 2024b);
- Recommendations based on practical experience

Limitations:

- Risk of subjectivity (Ismayilov & Khalafova, 2022a);
- Unreliable results if experts are not properly selected
- Difficulties in generalizing findings compared to statistical data

In museum activity evaluation, focus groups and observation methods are qualitative approaches that allow a deep understanding of audience experience and the museum's social impact. (Askerova & Mammadov, 2025). These methods complement quantitative data and are useful for revealing difficult-to-measure aspects such as visitor behavior, emotional responses, and user experience.

**Focus Groups*

Focus groups are structured discussions led by a moderator, involving selected participants (usually 6–10 people) around a specific topic. In the museum context, this method helps explore the perspectives of visitors, teachers, students, and other stakeholders.

**Applications*

- Assessing the attractiveness of exhibitions
- Evaluating the effectiveness of educational programs
- Gathering public opinions on renewed exhibition design
- User experience with digital services

**Structure of a Focus Group*

**Participant Selection:* Representatives from various social groups (children, teachers, tourists, elderly people, etc.)

**Discussion Questions:* Pre-prepared open-ended questions

**Moderator:* A neutral person who manages the discussion

**/Analysis:* Audio recordings and transcripts of the discussions are analyzed

**Sample Questions:*

- "What attracted you the most in the museum?"
- "Are the exhibition explanations sufficient for you?"
- "How do you evaluate the use of technology?" (Kushzhanov, N. V., & Dashqin, 2019a);
- "What feelings did you have after the visit?"

**Observation Method*

The observation method involves monitoring and recording visitors' real-time behaviors, interest levels, and navigation habits within the museum. This approach can be conducted either passively or actively.

**Forms of Observation*

- *Natural Observation:* Visitors are unaware they are being observed (behavior is more natural)
- *Structured Observation:* Conducted according to pre-prepared observation forms

- *Participant Observation*: Followed by brief surveys or interviews after the observation

Evaluated Factors:

- Duration of time spent viewing exhibitions
- Number of visitors standing in front of exhibits
- Interaction with interactive elements
- Ease of movement/navigation within the museum
- Questions and reactions visitors have in front of exhibits

Hybrid and Innovative Approaches:

KPI (Key Performance Indicators)

* Specific KPIs are defined according to the museum's goals:

- Annual visitor growth target
- Number of sponsors and average financial support
- Participant satisfaction in educational programs

**Balanced Scorecard (BSC)*

This model evaluates performance from four main perspectives:

- Financial
- Visitor orientation
- Internal processes
- Learning and growth (İsmayilov, Mahammadli, & Gasimli, 2023a).

A newer approach involves systems measuring the depth of social impact:

- Museum's impact on the community
- Contribution to social change
- Role in shaping public opinion

International practices in evaluating museum performance vary depending on countries' cultural policies, management systems, and public expectations. However, some models and approaches are considered more successful in practice and serve as examples for other countries. In the United Kingdom, the management of the museum sector is overseen by Arts Council England. They apply a system called the Museum Accreditation Scheme for evaluation. The key indicators in this system include:

- Level of public engagement
- Visitor feedback and experience
- Effectiveness of educational programs
- Quality of management and planning (Kazimi & Mahammadli, 2021).

Evaluation approaches in Sweden and Norway are more focused on social inclusiveness and public impact. The indicators here are based on these elements:

- Accessibility and equality
- The level of cultural participation of household and minority groups
- Museums' activities related to the environment and sustainable development

In the United States, since most museums operate as private and non-profit organizations, evaluation is based on both financial sustainability and visitor base and donor satisfaction:

- Number of donors and volume of donations
- Effectiveness of public relations (Məhəmmədli, 2024).
- Sponsorship agreements and social impact reports

UNESCO and ICOM provide global criteria to evaluate museum activities through international framework documents:

- Preservation of cultural heritage
- Collaboration with the public (Kushzhanov & Dashqin, 2019a).
- Sustainable development and ethical management principles

The activities of museums in the Republic of Azerbaijan are regulated by the “Law on Culture,” state programs on “Museum Work,” and normative documents of the Ministry of Culture. However, quantitative indicators are predominantly preferred in the evaluation process.

**Currently Applied Indicators*

- Annual number of visitors
- Number of exhibitions and events
- Balance of income and expenses
- Increase in the number of exhibits (Heydar, 2023).

Positive Trends

- Implementation of electronic ticketing and statistical reporting systems in some museums
- Organization of virtual exhibitions and activity on social networks
- Development of educational programs for youth
- Implementation of projects for the modernization of regional museums

Conclusion

Creation of a unified national evaluation system: A system should be developed that includes both quantitative and qualitative indicators for evaluation; *Application of electronic*

monitoring and analytical tools: Interactive evaluation platforms should be established in museums to assess visitor behavior and social impact; *Encouragement of public participation:* Visitor feedback, civil society, and independent expert opinions should be integrated into the evaluation processes; *Professional staff training:* Systematic organization of local and international training on museum management and evaluation is necessary; *Implementation of pilot projects:* New evaluation systems should be tested in selected museums, and improvements should be made based on the results. Evaluation of museum activities is not only a tool for statistical reporting but also an important instrument for strategic management and public accountability. The establishment of a systematic approach in this field in Azerbaijan will enable museums to fulfill their socio-cultural functions more effectively and increase public trust. This, in turn, will contribute to the sustainable development of the country's cultural policy as a whole.

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