

# INTERPRETATION JOURNAL

IAHI

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## Money matters

Adding up the costs in interpretation





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Commissioning Editor:  
David Masters  
0121 449 1600, david.masters@zen.co.uk

Production Editor:  
Elizabeth Newbery  
01865 793360, elizabeth@newberyandengland.com

Copy Editor:  
Rachel Minay

Editorial Advisory Board:  
Aaron Lawton, James Carter,  
Susan Cross, Carl Atkinson

Design:  
Touchmedia, www.touchmedia.uk.net

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## The next issue will feature: A Way with Words

If you wish to submit an article please contact David Masters tel: 0121 449 1600 or email: [david.masters@zen.co.uk](mailto:david.masters@zen.co.uk)

For more information about the Association for Heritage Interpretation [AHI], send an email to [admin@ahi.org.uk](mailto:admin@ahi.org.uk) or write to the Administrator, AHI, 131 Trafalgar Street, Gillingham, Kent ME7 4RP tel: +44 (0)560 274 7737.

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# FOREWORD: IT'S THE ECONOMY, STUPID

If you care about the future of interpretation in the UK, this edition of the journal is essential.

The credit crunch has brought home to roost decades of living on credit, both for individuals and government. Times are going to be tough for quite some time, and the next election will be a political battle over spending cuts and tax rises.

Everything we do as interpreters is possible because of an assumption that interpretation is of value to society, but where is the evidence to support this? In this edition of the journal we explore some of the key issues surrounding the funding and financial benefits of interpretation.

Rob Robinson kicks us off with an assessment of the heritage economy in Scotland and its lessons for interpretation. Tony Crosby and Helen Batte then outline the approach of the HLF and a regional development agency to funding interpretation schemes and the benefits they hope to realise. Genevieve Adkins, Director of the Centre for Interpretation Studies UHI, sets out the parameters of a debate about the costs and benefits of interpretation and calls for better research to help interpreters make a case about the benefits of their work.

We follow with some case studies on the economic impacts of interpretation. This is an area that has not been well studied in the UK so we have looked abroad for examples. In a fascinating piece, Michael Kirschman explores the economic benefits of nature reserves in North Carolina and explains how these are now a thematic core of their interpretive programme. Jane James reports on the financial benefits to South Australia wineries in taking an interpretive approach to their marketing, and Nigel McDonald explores the assumed economic benefits of interpretation projects in Shropshire. Finally, Kit Read provides a timely reminder of the need to budget for the on-going care, maintenance and renewal of interpretation.

Unfortunately we can't ignore the bean counters of this world, and they are about to get a lot more powerful. We need to make a compelling, evidence-based case for the many benefits of interpretation. The articles in this edition of the journal help to point the way.

David Masters, Commissioning Editor

**Be prepared for the economic upturn – come along to this year's AHI Conference! (Cardiff, 9-11 September 2009, in conjunction with Dehongli Cymru/Interpret Wales and supported by Capital Region Tourism.)**

Our timely theme is 'Making the Past Work for the Future: Interpretation for Regeneration and Communities', and we'll be hearing from a range of international speakers and looking at inspiring local sites to discover how interpretation can make a difference for people and places.

You can find out the funding forecast from the Heritage Lottery Fund, discover whether the new Waterfront Museum at Swansea has made a significant impact on the local economy and draw inspiration from Blaenavon World Heritage Site, where tourism is replacing heavy industry. This is the perfect opportunity to network with colleagues and clients, share interpretive best practice and find out how others have put interpretation in action after previous economic downturns. You are also invited to tell us about your own experiences of regeneration and community projects.

For the full programme and to download a booking form, visit [www.ahi.org.uk/www/](http://www.ahi.org.uk/www/) events. You can also raise the profile of your business by advertising at or sponsoring the conference – contact [advertising@ahi.org.uk](mailto:advertising@ahi.org.uk) to find out more. We look forward to seeing you there!

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# THE BATTLE FOR SURVIVAL

Rob Robinson argues the best way to arrest declining visitor numbers to heritage attractions in Scotland is to raise the standard of interpretation, thereby increasing income.

Even before the current recession, declining visitor numbers and increasing operational costs were heralding troubling times for the Scottish heritage attraction sector. Now, more than ever, Scotland historic properties need to raise their game, become more targeted towards the needs of their visitors and improve their interpretation. As the global downturn continues, finance becomes more difficult to acquire, and competition for people's leisure time increases; heritage attractions need to differentiate themselves, cater for day visitors and provide reasons for repeat visits. Good interpretation will be at the heart of their survival.

'ATTRactions WILL NEED TO BE DIFFERENT AND DISTINCTIVE, TARGETING THE MARKETS THAT BEST SUIT THEIR LOCATION AND PRODUCT, AND ENSURING THAT THEY DELIVER A UNIQUE EXPERIENCE THAT MATCHES THE DEMANDS OF TODAY'S VISITOR'

*Properties Sector* for the Historic Properties Group: a collaboration between Historic Scotland, the National Trust for Scotland and the Historic Houses Association.

## FLAGGING UP THE FORECAST

As the world was deliberating whether or not we were in an economic recession and diesel was the wrong side of £1.30 a litre, I was finishing a major review and forecast study on the Scottish heritage attraction sector. The date was March 2008 and the report was called *Future Trends for Growth in the Historic*

The report highlighted some worrying trends and made a series of recommendations for the sector as a whole and for individual properties. Among these was the need for heritage attractions to become more people orientated, to understand better who their visitors are and what they are looking for, and to deliver interpretation that engages target audiences.

BELOW:  
Even Edinburgh Castle, by far the most popular heritage attraction in Scotland, saw a decline in visitor numbers during 2008.



ABOVE:  
Blair Castle is moving with the times by taking people behind the scenes.

It was the first time that all the audience and finance data for the sector as a whole had been brought together in Scotland – and it certainly highlighted the need for action.

## ALL THE KING'S MEN

The heritage attraction sector in Scotland accounts for 60% of all paid-entry visitor attractions and 63% of all paid-entry visits. The 235 heritage attractions identified in the study draw in just over 9 million visits per year, 13% of which are to Edinburgh Castle alone.

The good news is that more people are now visiting heritage attractions than ever before, with overall visitor figures rising by one million over the last decade. The bad news is that this

presents a misleading picture. For most heritage attractions visitor numbers are actually declining, some quite rapidly, and for many sites it is the family market that has been turning away in the greatest numbers. The truth behind the overall growth in visitor numbers is actually down to a combination of specific factors: new major heritage attractions opening, such as the Royal Yacht Britannia and Mary King's Close, dramatic growth by a few attractions, such as Rosslyn Chapel, and attractions counting visitors where they didn't before or changing the way they count them now. Any genuine growth is for the few. For almost everyone else, visitor numbers are at best stable and, more likely, steadily declining.

## COMING OUT FIGHTING

Despite decreasing numbers, attractions in Scotland are getting better at encouraging visitors to part with their pennies. Revenue is continuing to increase as admission charges go up, with shops becoming more enticing, cafés more efficient and the functions market, the saviour of the sector, being fully exploited.

Increases in income generation are, however, often more than matched by increases in conservation and general maintenance costs and the growing overall costs of operation, primarily wages and utilities.



ABOVE:  
Chillingham Castle has a truly terrifying torture chamber and plenty of ghosts. Its interpretation is unlike any you'll find elsewhere!

'WHERE THE HERITAGE SECTOR IN SCOTLAND HAS ARGUABLY BEEN MOST UNSUCCESSFUL OVER THE LAST DECADE IS IN ATTRACTING THE (REPEAT) DAY TRIP MARKET – AND FAMILIES IN PARTICULAR'

high. In the shorter term, there is less money for reinvestment and outdated interpretation will have to last another year.

### PREPARING FOR BATTLE

Finding the funds to keep Scotland's heritage sites open to the public is becoming increasingly difficult and, to make matters worse, we as customers are demanding more and more. Visitors are now looking for value for time as well as value for money. They are looking for flexible and personalised experiences and unique and authentic heritage attractions. In other words, the real deal.

The bottom line for many heritage attractions in Scotland is that they need to raise their game and that they will need to do it themselves. Site operators will need to be cleverer, quicker to respond and more aware of opportunities if they are to move forward or, in some cases, survive at all.

### INTERPRETATION: ATTACK!

Tailoring interpretation to suit different visitor interests can really make a difference. Blair Castle in Highland Perthshire now offers a variety of themed guided tours, including a behind-the-scenes 'Attic Tour', and is enhancing interpretation of the grounds by offering guided garden tours in May and September with the gardener. It has also improved its provision for children and now offers quizzes, treasure hunts and regular family-friendly days throughout the summer, the latter including a special children's guided tour of the castle and storytelling – with tractor rides too.

In the medium to long term, the ticking time bomb of decreasing visitor numbers and increasing income generation will undoubtedly reach a tipping point, where either there aren't enough visitors to cover the operational costs or the cost of admissions becomes prohibitively

Other castles, such as Glamis Castle, are tailoring their visitor experience to the demands of individual audiences by offering bespoke small-group VIP guided tours for little more than the standard admission charge.

### SURVIVING AGAINST THE ODDS

The current focus of the Scottish national tourism body, VisitScotland, is predominantly on the short break market. The fear is that short breakers will only have time to visit the flagship attractions in the city they are visiting, and that the tourism visitor upon whom many heritage attractions rely will continue to decline – and that this decline will continue to be more strongly felt in rural areas or, in Scottish terms, the areas outside Edinburgh and Glasgow.

At present, given the current economic uncertainty, even the ambition to grow tourism in Scotland is struggling. The national tourism trends from 2006 to 2008 are of small increases in overseas visitors (but a contraction of the heritage-loving US market) and of declining domestic UK tourism, providing an overall fall in the number of tourism visitors to Scotland.

Where the heritage sector in Scotland has arguably been most unsuccessful over the last decade is in attracting the (repeat) day trip market – and families in particular. (It is interesting to note that visits to family-friendly wildlife and farm park attractions have been increasing while heritage sites have been declining.)

'THE BOTTOM LINE FOR MANY HERITAGE ATTRACTIONS IN SCOTLAND IS THAT THEY NEED TO RAISE THEIR GAME AND THAT THEY WILL NEED TO DO IT THEMSELVES'



LEFT:  
Traquair House is hooking the local market with seasonal events and themed activities.

Some castles, such as Traquair in the Scottish Borders, have attempted to address this over recent years and have begun to carve a local reputation for events. With a healthy calendar of events and themed activities, including the popular Traquair Fairs, which cater primarily for the local and day trip markets, Traquair is creating additional reasons to visit and, more importantly, to return. After a visit last winter to meet Santa at Traquair's Christmas Fair, my daughter now believes Traquair to be Santa's castle, and I'm sure a December visit will be on our calendar for many years to come.

### HOMEGROWN SUCCESS

The current economic recession is, some believe, leading towards a bumper 2009 for the Scottish self-catering, camping and, to a lesser extent, hotel trade as we stay at home to enjoy what we all hope will be a much sunnier summer than we've endured recently. Can this homegrown visitor be the heritage sector's silver lining?

As we are witnessing with the National Trust for Scotland, not all heritage sites will continue to survive as visitor attractions. If attractions are to emerge from the credit crunch, and address the serious issue of failing visitor numbers, they are going to have to play to their strengths: primarily their authenticity and their uniqueness. They will need to be different and distinctive, targeting the markets that best suit their location and product, and ensuring that they deliver a unique experience that matches the demands of today's visitor.

Over the Border, both Chillingham Castle in Northumberland and Muncaster Castle in Cumbria know their markets well and exploit the ghosts that supposedly haunt these castles to deliver an experience that meets the expectations of their family visitors. Muncaster even offers overnight ghost sits for those with nerves of steel. Similarly, Traquair is now offering evening guided ghost tours, where the phantoms come to life to tell the stories of the house's history and past inhabitants.

Interpretation is a fundamental tool for conveying a site's USPs (unique selling points), differentiating one visit from another and creating a unique and personal experience. Used well, interpretation can be flexible enough to cater for different audiences simultaneously and is invaluable in encouraging repeat visits. It connects the product with the visitor and has a central role to play in ensuring that the heritage sector moves with the times. It could help Scotland's sites take advantage of market opportunities, attract more paying visitors through their doors and meet the needs of visitors today and tomorrow.

Rob Robinson Heritage Consulting provides strategic planning and interpretation to the heritage and tourism sector.  
[www.heritageconsulting.co.uk](http://www.heritageconsulting.co.uk)

# THE FUNDER'S PERSPECTIVE

Tony Crosby outlines the Heritage Lottery Fund's latest strategic plan, current funding situation, assessment process, and what outcomes HLF looks for when funding interpretation.

The Heritage Lottery Fund (HLF) was set up in 1994 to distribute money raised by the National Lottery to heritage projects throughout the UK. This year we will be celebrating 15 years of the Lottery and, in that time, HLF has awarded over £4.3 billion to over 28,800 projects. These range from multi-million-pound investments in well-known sites such as ss *Great Britain* and Hadrian's Wall to small grants making a big difference to community groups. It's impossible to say how much has been spent on interpreting heritage, but as providing interpretation helps to meet our strategic aim on learning and that aim has been mandatory for all projects since 2002 then a majority of our projects have an interpretation element to them. A rare few Tyne & Wear Museum's 'Look, Touch, Listen and Smell' and Rochester Cathedral's 'Ancient Stones – Untold Stories' are examples – have focused heavily on new interpretation.

## STRATEGIC PLAN 2008–13

In April 2008 we published our third strategic plan, *Valuing our heritage: Investing in our future* and set out our vision as the UK's leading advocate for the value of heritage to modern life. Responding to consultation, our three strategic aims are little changed and to receive a grant your project must do either or both of the following:

- conserve the UK's diverse heritage for present and future generations to experience and enjoy;
  - help more people, and a wider range of people, to take an active part in and make decisions about heritage;
- and all projects must:
- help people to learn about their own and other people's heritage.



LEFT: Tactile interpretation panel on the Leeds and Liverpool canal developed with the help of Galloway's Society for the Blind.

## HELPING PEOPLE TO LEARN

Interpretation is a vital tool in communicating the significance, value and meaning of our heritage. Good interpretation contributes to the 'heritage cycle' that we want to encourage so that our investment has maximum impact. As articulated by English Heritage:

- by **understanding** the historic environment [and wider heritage] people value it;
- by **valuing** it they will want to care for it;
- by **caring** for it they will help people enjoy it; and
- from **enjoying** the historic environment [and wider heritage] comes a thirst to understand more.

Our guidance *Thinking about interpretation*, available on our website, sets out good practice guidelines and gives a flavour of the range of interpretation we can fund. In the guidance we set out how, when commissioning interpretation, you should follow universal design principles: it should be designed so that it engages the widest range of people and meets their different needs. The best interpretation is inclusive; not separating out certain audiences by providing something special for them, but encouraging everyone to take part on an equal basis.

Interpretation should take into account the different interest levels people have and be available in layers of information from, for example, a short introductory leaflet for those new to or with limited interest, to a more detailed booklet for those who want to know more. Audio guides with options for different amounts of detail are good for providing these layers of information in an inclusive manner – but there will always be people who prefer the written word.

When planning new interpretation we advise you to consult your current and target audiences and involve them in the design and

RIGHT: Video with subtitles and BSL interpretation at the Imperial War Museum, Duxford.



testing. This can be particularly useful when it comes to meeting the varying needs of disabled people – getting them on board at an early stage will give you confidence that what you are producing will be fit for purpose. We expect to see proposals for the use of a variety of media each aimed at different disabilities, and welcome proposals to fund innovative solutions to meet people's needs.

The Tyne & Wear Museums' 'Look, Touch, Listen and Smell' project was a good example of one that met the varying needs of a wide audience. With our funding the museums set out to tackle sensory barriers to access, improving the quality of sensory interpretation at five sites and helping them to reach out to everyone in the local community. They provided pre-visit information in loan packs for people with sensory impairments, installed tactile and visual orientation points, provided audio guides including directional and description tours for people with visual impairments, and installed touch-tours at an art gallery.

## FEEDBACK

Tyne and Wear usefully built an evaluation programme into their project and produced a lessons learned report which is available to others in the sector to use. In our third strategic plan we have strengthened our requirements on evaluation and want to encourage a greater culture of grantee sharing and learning about best practice. Giving yourself time to reflect on what has worked and why in a structured way as your project progresses is worthwhile and leads to better outcomes. We will fund you to do this and

**'THE HERITAGE LOTTERY FUND IS THE UK'S LEADING ADVOCATE FOR THE VALUE OF HERITAGE TO MODERN LIFE'**

intend to play a role in sharing what we learn through your evaluations on our own website ([www.hlf.org.uk](http://www.hlf.org.uk)).

## SIMPLER PROCESSES

Other more significant changes in our third strategic plan are that we have made the process of applying to us simpler and put in place extra support for applicants. Our small grants programmes – Your Heritage (£3,000 – £50,000) and Young Roots (£3,000 – £25,000, for projects involving young people aged 13–25) now have a simpler application form, a shorter assessment period and offer the possibility of mentor support during the delivery phase of the project. All applicants to Heritage Grants (£50,000 plus) now go through a two-round application process. We ask you to complete a much briefer first-round application, which we will assess within three months. There then follows a development period, which we can help you to fund, and during which a mentor could be appointed to support you to the second round. Both rounds are competitive.

## ACTIVITY PLANS

As part of a second-round application for a Heritage Grant, you will need to provide an activity plan. This is a new requirement and here we ask you to tell us in detail how your project will meet our learning and participation aims. We ask you to set out who your project will benefit, about the audience research you have done and what activities you plan to do

to meet the needs of your audiences. Any interpretation proposals you have will form part of your activity plan. The level of interpretation planned should be commensurate with the size of grant requested: the greater our investment, the greater the level of interpretation and impact we expect to see. The type of interpretation should also reflect the size and nature of your organisation: we expect more from an applicant with a national remit or one that is supported by a much bigger organisation.

## AND FINALLY, THE MONEY

Our grant budget for the period to 2013 is £180 million per year and we remain the largest dedicated funder of the UK's heritage. We look forward to receiving your ideas for innovative interpretation projects that will help us to sustain our museums, buildings, landscapes and cultures, and ensure they are relevant to modern society.

We have seen competition for all levels of grant funding increase over the past two years. Undoubtedly this will mean some of our applicants will be disappointed, but overall we think the quality of what we fund will be higher and we hope our simpler application process will encourage you to 'have a go'.

Tony Crosby is a Policy Advisor, Participation and Learning at HLF. [tonyc@hlf.org.uk](mailto:tonyc@hlf.org.uk)

# LET'S HEAR IT FOR THE NORTHWEST!

Helen Batte looks at how funding heritage tourism and regeneration is assessed in the Northwest.

Accessing funding for heritage, heritage tourism and heritage regeneration projects has never been straightforward. The diversity of the sector means that there is never likely to be a one-stop, one-size-fits-all solution. Here we take a look at how the Northwest Regional Development Agency has been supporting the sector and some of the options for accessing NWDA support.

## WHAT IS THE NWDA?

The Northwest Regional Development Agency (NWDA) leads the economic development of England's Northwest and also has the strategic lead for tourism in the region. It has supported many heritage projects over its ten-year history and remains committed to investing in initiatives that contribute to improving the quality of life and the visitor experience in the region.

The image of the region is a key driver for economic growth and by developing the quality of the visitor experience and maximising major event and cultural opportunities we believe we can boost the regional economy. Historic sites are a big draw for visitors and the Northwest's varied heritage assets have great potential to deliver economic benefits for the region. It is estimated that heritage tourism could be worth as much as £3 billion to England's Northwest every year.

## WILL YOU FUND MY PROJECT?

From large-scale bricks-and-mortar investments to event programmes, the public realm and public art, the NWDA has no hard-and-fast rule that dictates which heritage related projects will or won't get funding. The agency has a number of clear priorities, set out in the Regional Economic Strategy (RES) and the Tourism Strategy for England's Northwest, and it is these priorities that shape the agency's spending on all projects, whether they have a heritage element or not.

The key in many cases is sub-regional buy-in. Support and prioritisation at a local level contributes hugely to the success of a project or initiative; both in terms of gaining NWDA support and the long-term sustainability of the development. Projects obviously also have to have a demonstrable impact on the local, sub-regional and regional economy.

## SO WHAT ARE YOUR PRIORITIES?

England's Northwest has a strong tourism industry, worth £13.6 billion and 30 million visits a year. It is built largely on our world-famous cultural offerings and rich history and heritage. The NWDA is committed to developing the region's visitor economy, and one way to do that is through the region's heritage – in particular the agency has prioritised our World Heritage Sites, the historic cities of Chester, Lancaster and Carlisle, and the Lake District, for support.

A number of 'signature projects' are currently being delivered through partners with agency funding, including the development and marketing of Hadrian's Wall, Blackpool's revival, the Mersey Waterfront and the renaissance of the Lake District, all of which have strong heritage and interpretation elements.

Signature projects are major capital projects that will have a transformational impact on the visitor economy. They involve a substantial capital investment, build on and reinforce the region's 'attack brands' (i.e. the strongest visitor appeal) and contribute to a unique, highly attractive sense of place.

The region's 'attack brands' are Liverpool, Manchester, Chester and the Lake District. This market-led approach means that we lead our promotion with what is strongest and has most appeal to visitors. Improving the product associated with these 'attack brands' and 'signature projects' is a priority for the NWDA.

RIGHT:  
A concept design from the NWDA funded interpretation plan for Chester.

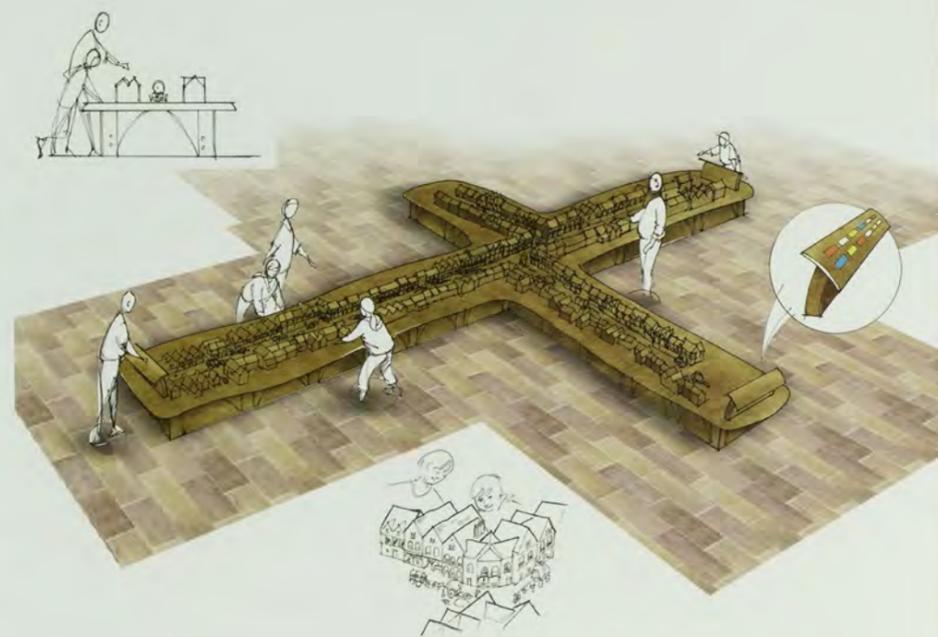
'SUPPORT AND PRIORITISATION AT A LOCAL LEVEL CONTRIBUTES HUGE TO THE SUCCESS OF A PROJECT OR INITIATIVE'

## WHAT KIND OF PROJECTS DO YOU SUPPORT?

The NWDA has funded a number of discrete projects with heritage at their heart, including £1.2 million towards the Museums Renaissance Programme in the Northwest, which is assisting with the re-presentation of collections. In Manchester, agency funding has contributed to the People's History Museum and John Rylands Library, and in Liverpool, the new Museum of Liverpool has received £32.7 million of NWDA funding.

As well as improving the product associated with the 'attack brands' and 'signature projects', investment in revenue-led projects aims to encourage further public and private sector investment in the area, as is the case with Chester Renaissance.

In Southport, the NWDA has matched DCMS Sea Change funding in order to establish a major regional cultural centre. The Cultural Centre will be housed in an iconic Grade II listed building on Lord Street and includes



two theatres, a major art gallery and the central library. The Centre will complement public realm improvements on this famous thoroughfare.

NWDA funding has also been accessed to support event programmes, including for Hadrian's Wall and the Lakes Alive activity, which is part of the Northwest's contribution to the Cultural Olympiad. Top quality events make a significant contribution to enhancing the image of the region and improving the quality of life.

## ARE THERE SPECIFIC FUNDING STREAMS FOR HERITAGE PROJECTS?

The NWDA operates a number of grant schemes in addition to its programme funding. The Heritage Tourism Improvement Scheme in particular targets historic sites committed to improving the visitor experience. The £500,000, three-year scheme launched in March following a successful pilot project which saw several grants awarded to heritage tourism businesses to help them adapt to new markets and business opportunities.

Managed by the Lancashire and Blackpool Tourist Board, the scheme is supported by a dedicated Heritage Tourism Project Officer, whose post is funded by the NWDA and English

LEFT:  
Concept design for the NWDA funded signage for Chester.



Heritage. The project aims to grow heritage tourism in the Northwest and ensure it is recognised as a significant player in the region's visitor economy.

The funding is available to historic houses, gardens and buildings in the Northwest that are open to the public and are interested in maximising the contribution that they make to the region's visitor economy. The new round of funding will award grants of up to £40,000 for physical improvements that enhance the visitor experience including car parking, educational activities, disabled facilities and interpretation.

## WHERE CAN I GET MORE INFORMATION?

Try [www.nwtourism.net](http://www.nwtourism.net) for information about tourism development opportunities, including the region's 'signature projects'. More information about the NWDA's programmes can be found at [www.nwda.co.uk](http://www.nwda.co.uk), including information about general business support packages and access to all of the agency's publications.

For more information about the Heritage Tourism Improvement Scheme contact Andrew Backhouse ([abackhouse@lbtbltd.com](mailto:abackhouse@lbtbltd.com))

Helen Batte is Press Officer, North West Development Agency.

BELOW:  
Chester has been identified as an attack brand by the NWDA.



# DOES INTERPRETATION PAY?

Genevieve Adkins argues that in these straightened times, interpreters may have to come up with concrete evidence of the economic benefits of interpretation in order to prove their worth.

To secure resources in any field it's important to assess what is the likely return on investment. We all know this. Yet faced with a request to write an article on the economic benefits of interpretation I knew I'd been handed a challenge. Whilst interpreters have long claimed the economic benefit of interpretation, empirical evidence is scarce.

## CHALLENGING TIMES

Why is this? I'd like to suggest a couple of reasons. Firstly, interpreters are busy doing what they do (and should be proud of this). Secondly, interpreters are busy enjoying what they do (and should be proud of this too). Thirdly, the ever-increasing budgets allocated to interpretation in recent years have helped foster an environment in which interpreters haven't had to question or justify their activities. Interpreters seem to say to themselves 'surely if we can see the benefits of our efforts, others can see them too!' But what interpreters may fail to recognise is that what is so obvious to them may not be so obvious to others. Indeed, in these times of unprecedented pressure on public finances, this position may well be challenged, putting interpreters, and interpretation, at risk.

Over the past decade and more, the museums and arts sectors have gone through a painful process of identifying and articulating their value. Museums have justified their public funding by evidencing market demand and loudly proclaiming their return to being Palaces of Discovery. These efforts are recorded in a series of publications including Dr Stuart Davies's *By Popular Demand: A strategic analysis of the market demand for museums and art galleries in the UK*, David Anderson's *A Common Wealth: Museums and learning in the United Kingdom* and Victor Middleton's *New Visions for Museums in the 21st Century*. These reports set the frame for renaissance – the MLA's programme to transform England's regional museums (MLA, 2009).

'INTERPRETATION, FORMERLY AN ACTIVITY THAT RECEIVED SO LITTLE FUNDING AS TO BE UNNOTICED BY THE BEAN COUNTERS, MAY WELL COME UNDER SCRUTINY'

In parallel, a series of research projects have provided evidence of the economic importance of the arts in Britain, providing a firm basis for their ongoing funding.

## PROVING OUR WORTH

These studies are now a decade or more old. But as we move into a time when very difficult decisions will be made about how public funds are allocated, organisations may once again be asked to prove the value and benefits of their activities and very existence. And interpretation, formerly an activity that received so little funding as to be unnoticed by the bean counters, may well come under scrutiny. Interpretation, and interpreters, may be held accountable.

So what might the future bring? There should be no doubt that interpreters and managers will be increasingly asked to justify their budgets. As tough decisions are made between statutory responsibilities and non-statutory activities, interpreters will need evidence to defend budget bids and staffing.

## COLLECTING EVIDENCE

So what evidence might we need to collect? I suspect that at this early stage in our efforts we should focus on two key areas. First is identifying the direct financial benefits of our work.

I know that it's often difficult to assess the importance of interpretation to organisations and industry, as it is rarely accounted for

RIGHT: Involving people, communities and stakeholders in planning and delivering interpretation projects can realise wider public benefits.



separately. However, my concern is that this may lead to underestimating the extent to which interpretation is used, and subsequently undervaluing its economic and wider contribution.

From my own experience, an interpretation-led project to introduce new guidebooks at Historic Scotland in 2006 saw sales figures increase between 8–98% (across four pilot sites). As guidebooks represented around 5% of commercial income to the Properties in Care department at the time, this represented a significant increase in income through investment in interpretation. Similarly, effective management of Historic Scotland's audio guide contract and support to onsite sales initiatives meant that it generated an annual income of around £250,000, supporting investment in audio guide provision across Scotland.

Second is identifying the indirect economic benefits of interpretation. And here, I suggest, is where most of our efforts should focus.

## THE MEANING OF ECONOMICS

To start exploring what this might entail, let's take a look at what is meant by economics. Lionel Robbins provides the following definition: 'Economics is the science which studies human behaviour as a relationship between ends and scarce means that have alternative uses' (Stigler, 1984: 301). From this we can see that economics explores the relationship between purposes and resources. Between policy and activity. Between objectives and behaviour. And so we turn to interpretation.

As Director of the Centre for Interpretation Studies (CIS), I've been fortunate enough to be in a position to reflect on this subject and speak to others with a keen interest in this area. What has emerged is a clear consensus on two main areas. First, the need to evidence that our work provides value for money. Second, the

need to evidence the wider public value of our work. These are set out in the draft research strategy for CIS as below:

- effectiveness focuses on outputs and outcomes, good practice and developing, communicating and sharing common principles, standards and guidance;
- benefits explores the social, economic and wider gains derived through interpretation. Key areas are attitude and behaviour change and links to wider policy areas for social capital, health and well-being, sustainability and climate change.

## MAKING CONNECTIONS

Given the challenging times we face, this work is more important than ever. It was Tilden himself who wrote that interpretation is an educational activity. It was Tilden who wrote of the connection between learning, attitude and behaviour. Let's engage fully with these ideas. Let's set the task of gathering the data and undertaking the research that will enable us to demonstrate the sheer scale and volume of our contribution to the issues that face us today – from learning, to life choices, to health and well-being, to conservation and presentation, and to economic benefits (both direct and indirect).

Interpreters need to adopt an evaluation culture and accept the need for appropriate knowledge and skills in these areas. These are held by researchers and academics. Therefore the development of the profession is, I'd like to suggest, dependent on an enhanced relationship with colleges and universities.

If we can make these changes, a future someone might write a very different article about the economic benefits of interpretation.

Genevieve Adkins is Director of the Centre of Interpretative Studies, UHI

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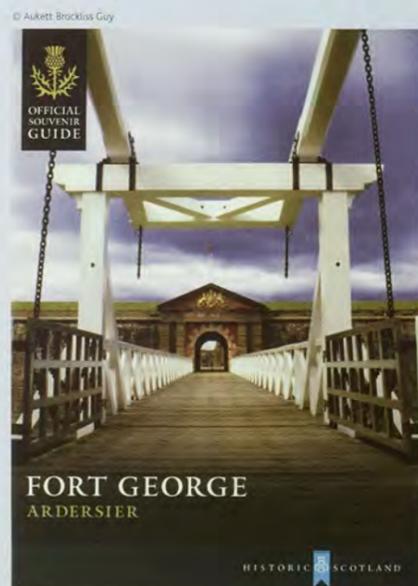
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BELOW: Historic Scotland's guidebooks illustrate how interpretation can provide an important income source.



# TELLING THE ECONOMIC STORY

Michael Kirschman describes a project to quantify and interpret the economic value of nature reserves in North Carolina, USA.

Interpretive programmes must be capable of attracting support – financial, volunteer, political, administrative – whatever is needed for the programme to flourish. This has never been truer, as agencies face unprecedented budget cuts. To aid our interpreters in attracting support, data was compiled on the benefits provided by nature reserves. This information is now woven through our interpretation. Additionally, themes have been developed which highlight these environmental and health benefits. For example 'Your community is healthier with nature next door' is the new thematic foundation for one reserve that protects our city's drinking water.

This article explores the economic benefits provided by nature reserves. Armed with this data, interpreters now interpret the 'true value' of our reserves.

## WATER QUALITY BENEFITS

The benefits of protecting open space, tree canopy, and watersheds are extensive, as there is a direct correlation to water quality. Mecklenburg County has experienced a significant loss of open space since the 1980s: since 1996 at a rate of 14.8 undeveloped acres per day. The predominant land feature is now impervious surfaces, creating significant storm water runoff. Even relatively impervious forest soils can absorb one inch of rainfall. Remove those trees and replace them with roads, parking lots, and roofs, and the same rainfall produces 27,000 gallons of runoff per acre.

So what is the value of storm water benefits provided by nature reserves? A 2003 analysis found they have a storm water retention capacity of 29 million cubic feet per year. This value can be conservatively estimated at \$58 million, the cost to build a facility capable of filtering this amount of storm water (and not including yearly operating costs).

## AIR QUALITY BENEFITS

Another significant benefit is air quality. Studies show there is a direct correlation between air quality and forested land. Urban forests reduce the effects of air pollution by removing carbon dioxide, sulphur dioxide, carbon monoxide, ozone and particulate matter. Using City Green Software, we determined that trees within our reserves remove 458,000 pounds of pollution every year.

What is the value of this air quality service? The lowest estimate was determined using a 2005 study for the city of Houston. This study placed the value at \$1.30 per tree per year. Since our nature reserves protect 1.7–2.2 million trees, this equates to a value of \$2,210,000 yearly.

## PERCEIVED WILDLIFE/HABITAT BENEFITS

Our county reserves protect 13 natural communities and 53 Natural Heritage Sites while providing habitat for thousands of wildlife species. The majority of our visitors hike and/or wildlife/bird watch on our reserves, and place a value on these experiences. A good example of this perceived value is:

*'Just a quick note about a wonderful experience my 14-year-old daughter and I enjoyed recently. On several occasions we have seen an immature barred owl and on one evening Mom (or Dad) in the same tree. I can't tell you how great it feels to witness this with my daughter. Thanks for helping keep the park safe for animals and thusly allowing this Father/Daughter moment.'*

Obviously, wildlife has 'value' to this family. However calculating this can be tricky. One method used to determine value is willingness to pay for it. Therefore, the price we (as taxpayers) pay to maintain natural areas could be used as an indication of their worth. Hence if taxpayers are willing to spend \$810,000 on conservation management

BELOW:  
Hickory-Beechwood Trail. Protecting trees and tree canopy creates value.



ABOVE:  
Children need exposure to nature.

(the relevant section of our budget), it could be argued that this is at least what those areas and the wildlife within them are worth.

## TAX BENEFITS AND THE PROXIMITY EFFECT

Although not well known (or interpreted), nature reserves provide significant direct economic benefits. The greatest of these derive from higher sale prices and property taxes via the 'proximity effect', or hedonic value. It results from the fact that people are willing to pay more for homes near parks, especially natural areas. The resulting higher sale price and associated taxes by an owner living

adjacent to or near a park represents a direct, immediate and ongoing economic return.

This is not a new phenomenon. Frederick Law Olmsted justified the purchase of Central Park by showing how the rise in adjacent land value would produce new taxes to pay for the park investment. By 1873, the park – which until then had cost approximately \$14 million – was responsible for \$5.24 million in extra taxes each year.

On average, properties adjacent to passive properties such as reserves experience a 20% increase in value. This declines to zero for properties 2,000 feet away. Using these results and public tax records, the 2,026 adjacent property owners and 3,146 nearby property owners living within just 1,000 feet of Mecklenburg County nature reserves provided an extra \$1,181,878 million to the tax base in 2008.

LEFT:  
Beechwood leaves at Latta Plantation Nature Preserve. Leaves are nature's air filters, removing pollution and saving us money.



## TOURISM

According to the Outdoor Industry Foundation, activities such as hiking, biking, camping or wildlife viewing generate enormous economic power. In fact, swimming, hiking/backpacking, fishing and camping are the leading vacation activities. In North Carolina alone they contribute \$7.5+ billion to the economy and support 95,000 jobs. What piece of this pie can be attributed to Mecklenburg County reserves? Using local tourism spending data (\$98.60/day), as well as reserve visitation data (75,000 tourists yearly) it can be argued the reserves contribute \$7,395,000 in tourism dollars every year.

## DIRECT REVENUE GENERATION

Any economic analysis needs to include the direct revenue generation of the nature reserves. Revenues from public and group programmes, campground fees, shelter rentals, boat launch fees and the nature centre gift shop were approximately \$230,000 in 2008.

## SOCIETY AND HEALTH BENEFITS

Nature provides significant health benefits, one being stress reduction. According to Stress Directions Inc., stress is recognised as a major drain on corporate productivity and competitiveness. Stress Directions Inc. calculates that \$300 billion, or \$7,500 per employee, is spent annually on stress-related issues. Over 100 studies have found that spending time in nature reduces stress. As cited in Richard Louv's *Last Child in the Woods*, even rooms with a view of nature help protect children against stress. Researchers have found that children with more nature near their homes have lower levels of behavioural disorders, anxiety and depression. Other studies show the benefits that even a view of nature or a walk in nature can have on the office worker, and it is well known that hospital rooms with views of trees or nature contribute to faster recovery times and discharges. All of a sudden, the extra taxes paid by those adjacent landowners seem like an excellent investment!

ABOVE:  
Lower McAlpine Bird Hike. Birdwatching and outdoor activities promote tourism and increase local tax revenues.

'RESEARCHES FOUND THAT A DOSE OF NATURE WORKED AS WELL AS, OR EVEN BETTER THAN, A DOSE OF MEDICATION TO IMPROVE CONCENTRATION

So what is the value of nature reserves in terms of their effect on stress? Honestly? – it is unknown. However, the fact that they provide stress benefits is well documented, and hence cannot be overlooked just because a hard dollar cannot be quantified.

## EMOTIONAL DISORDERS

Studies cited by Louv find that children with nature near their home report lower levels of behavioural conduct disorders, anxiety and depression. Incredibly, studies even suggest that nature can be used as therapy for Attention Deficit Hyperactivity Disorder (ADHD). A study of ADHD children found that walks outdoors appeared to improve attention and concentration. The researches found that a dose of nature worked as well as, or even better than, a dose of medication to improve concentration.

Undoubtedly, thousands of children with ADHD hike, walk and explore Mecklenburg County nature reserves. The value of this health benefit may be hard, if not impossible, to calculate, but similar to the impacts on stress, they cannot be denied.

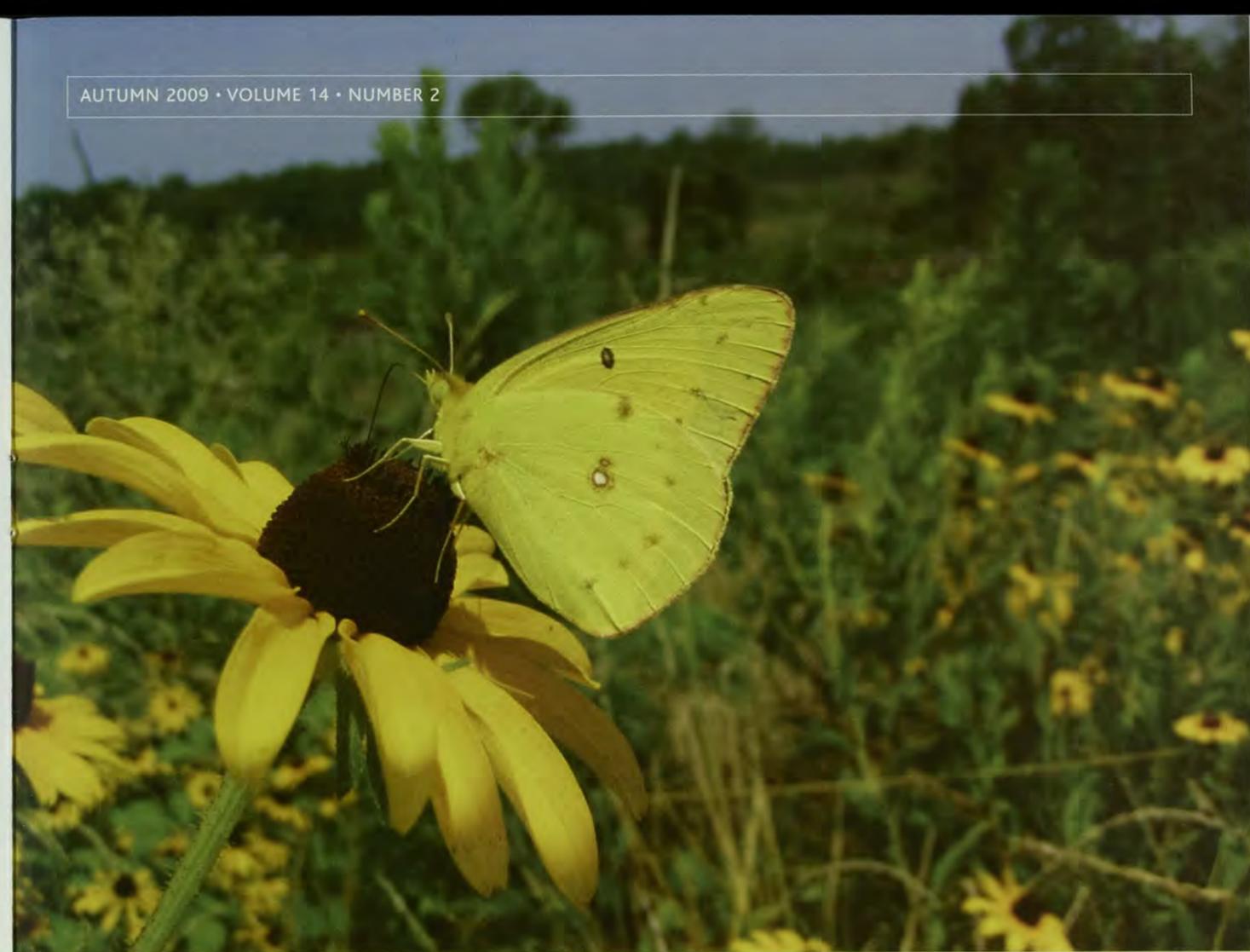
## EDUCATION BENEFITS

Research proves environmental education (EE) works. One comprehensive study by the State Education and Environmental Roundtable involving 150 schools in 16 states over a ten-year period concluded EE produces student gains in social studies, science, language arts, and math; improves standardised test scores and grade point averages; and develops problem solving, critical thinking and decision-making skills. In addition, EE students typically outperform their peers in traditional classes and demonstrate better attendance and behaviour. While the true impact of our hands-on, nature-based EE programmes may be unknown, it is certainly worth mentioning.

## CONCLUSION

Our residents value their nature reserves, however do they truly appreciate the magnitude of their 'value'? Combined, the total is a staggering \$69,826,878 (plus some unquantifiable unknowns).

Excluding the large water-quality benefit (a construction cost), and the wildlife/habitat benefit (it could be argued as a 'cost' as opposed to a benefit), the figure still exceeds \$11 million per year. This is based solely on air quality, tax and tourism benefits and direct revenue generation. Since the reserves operate on a \$3.1 million budget, this represents nearly a 350% return on investment, and doesn't even include the well-documented benefits to health and education.



ABOVE:  
Orange Sulphur at McDowell Nature Preserve © Alan Kneidel.

Other more detailed studies find even greater returns. A 2008 report showed the Philadelphia park system provided about 100 times the amount the city spends each year. Similarly, a 2009 study on New York State Parks concluded the 55.7 million visitors support \$1.9 billion in economic activity and 20,000 jobs. Furthermore the benefits exceed the direct costs of maintaining the state parks by a ratio of more than 5:1.

An understanding of the benefits provided by natural areas is critical to the success of their interpretation. If you're looking for support – financial, political or administrative – then you had better be able to prove you're worth it!

Michael Kirschman, Division Director,  
Mecklenburg County Park & Recreation,  
North Carolina USA  
Michael.Kirschman@MecklenburgCounty  
NC.gov

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# FINANCE AND FOOTFALL

**Nigel McDonald asks: Is good interpretation good business? What impact does improved interpretation have on businesses? Can visitors be encouraged to spend more money and more time, more often, in the current economic climate?**

## OFF THE RAILS

On 19 June 2007 disaster struck Severn Valley Railway when flooding wiped away large sections of the line in many places between Kidderminster and Bridgnorth. This couldn't have come at a worse time, as the railway was in the midst of building 'The Engine House', its new visitor centre at Highley Station.

Highley was one of the most damaged sections of line. A landslip left a 30-metre section of track hanging in mid air. Ironically the new centre was undamaged, but the loss of the line closed the railway.

Nine months later the line reopened. Severn Valley Railway had lost almost a whole season's trading. However, the result of the closure was also keenly felt in Bridgnorth. Businesses in the town and along the Severn Valley realised how important the railway was to their economy.

## BACK ON TRACK

Since reopening, the railway has seen a boom in visitor numbers; they are expecting to beat their 2006 record of 251,000 visitors this year. The Engine House has also proved to be very popular. In its first year of trading it more than doubled its expected 30,000-a-year visitor figure. It has certainly added to visitors' enjoyment of the line. A recent survey showed that 90% of visitors to the new centre were either very satisfied or delighted with their visit.

The Engine House offers new opportunities for the railway. The education service, which has been steadily building a loyal customer base over several years, now has high quality, indoor facilities. In addition to this, the new centre, with its excellent views of the line and the river, offers new opportunities for catering and corporate events.

## NEW OPPORTUNITIES

What the centre also offers is a dry indoor space to store the engines. Keeping steam engines is an expensive business with repairs often running to hundreds of thousands of pounds. All of the engines in the Engine House are in a queue, awaiting restoration. Keeping them in a semi-restored state indoors, rather than outdoors under tarpaulins, represents a huge saving in restoration time and cost.

Severn Valley Railway has chosen to reflect this saving in the Engine House's bottom line. Centre Manager David Mee states, 'Admission fees and secondary spend are very important to us and we are watching both closely. However, including an income figure for money saved by keeping the engines indoors shows another facet of the Centre's value to the Railway. This is especially important as costs for restoration are increasing beyond expectation in today's economic climate.'

**'SINCE REOPENING, THE RAILWAY HAS SEEN A BOOM IN VISITOR NUMBERS AND THIS YEAR THEY ARE EXPECTING TO BEAT THEIR 2006 RECORD OF 251,000 VISITORS'**

## NEW CONCERNS

Chatting with Zoe Griffin, Centre Manager for the Shropshire Hills Discovery Centre, adds more grist to this mill. In 2007 the Discovery Centre, which is a council-run attraction and community resource, underwent a major revamp. When it reopened for the 2008 season it did not reach its anticipated hike in visitor numbers. She puts this down to a lack of promotion whilst the centre was closed and the economic downturn.

BELOW:  
Off the rails: Flooding and landslides washed away the lines in several places, delaying completion of the Engine House.



LEFT:  
Flying high: Visitor figures soar at RAF Museum, Cosford.

John Hughes from the Trust says 'Our expert guide takes groups of up to ten people, providing night-vision goggles to help them see the badgers as they come out to forage and play. Feedback has been wonderfully positive. Several people compared badger watching favourably to African safaris – most gratifying as this is precisely the experience we were hoping for.'

'In 2008 we took 245 people badger watching. Given that we're only promoting Saturday evenings between April and September, we're not far off capacity.'

## WHAT ABOUT JOBS?

Funding agencies ensure that big projects such as Cosford and the Engine House bring new jobs. RAF Museum Cosford has doubled its staffing and almost all of the staff at the Engine House are new employees. The Wildwatch guide runs the activity for Shropshire Wildlife Trust as part of his business.

## WHAT CAN WE DRAW FROM THIS?

As ever, visitors are looking for good value, and fulfilling experiences. Interpretation plays a vital role in this. However, in the current climate, people are even more cautious with their time and money. The importance of excellent customer services and facilities is even more apparent to ensure that visitors keep coming back.

**Nigel McDonald runs No Nonsense – Interpretation, a heritage management and tourism consultancy based in the heart of Shropshire.**  
[www.nononsense-interpretation.co.uk](http://www.nononsense-interpretation.co.uk)

'Overall our visitor numbers remain consistent but there are less people paying for the exhibition. What's interesting is that the secondary spend of paying visitors accounts for three-quarters of the takings in the shop and café, although they represent less than 15% of visits overall.'

Zoe has also noticed an increase in activities such as Geocaching, 'We are getting more family groups, keen to explore the Shropshire Hills on satellite treasure hunts because it's good fun and cheap to do. Our surveys regularly record high levels of satisfaction for all three of our geocaching trails.'

In addition, however, Zoe's team have recognised that increasingly visitors are more discerning and demanding.

'We are getting more staying visitors who are coming to the Shropshire Hills rather than going abroad. Their expectations are higher than day visitors, expecting regular buses, on-demand tour guides and 24/7 activities. In response we are building on our core offer to provide innovative, good-value activities to attract more people and new audiences.'

## CHANGING DEMOGRAPHICS?

It would be easy to assume that the recession might be affecting customer behaviour and there are certainly indications that this is the case. Alex Medhurst, General Manager of RAF Museum Cosford, has noticed changes in their visitor profile. In 2007 the museum opened its £11 million National Cold War Exhibition.

'As a free entry museum, secondary spend is very important to us. The National Cold War Exhibition has been very well received. Our visitor numbers have risen from 180,000 to 350,000 last year. We've had nearly 800,000 visitors in the three years since opening. What we've noticed is that, although numbers are up, spend per head is down. The demographic is changing and an increased proportion of our new visitors are on lower incomes. The recession means they have even less money to spend.'

## BEATING THE DOWNTURN

One Shropshire success story continues to do well despite the downturn. In 2005 Shropshire Wildlife Trust started running Wildwatch. With the help of local badger experts, the Trust built a viewing hide next to a large badger sett at Melverley Farm in North Shropshire.

# SELLING AN EXPERIENCE

Jane James and Katherine Sutcliffe describe the impact of interpretation on potential visits to wineries in South Australia.



ABOVE:  
Vines and gums.

**'THE ADELAIDE HILLS WINE REGION (AHWR), IN THE HILLS TO THE EAST OF THE CITY, IS WELL KNOWN TO THOSE IN THE KNOW ABOUT WINE, BUT AS A WINE TOURISM DESTINATION HAS A LOWER PROFILE THAN ITS BETTER KNOWN NEIGHBOURS'**

Wine Tourism – the 'visitation to wineries and wine regions to experience the unique qualities of contemporary Australian lifestyle associated with the enjoyment of wine at its source – including wine and food, landscape and cultural activities'. It is part of the tourism experience in all States that grow wine. It is recognised as being a significant component of the South Australian tourism portfolio.

Wine has been made in Australia since the days of early European settlement in the late 1800s. Some of the oldest vineyards are found in South Australia in the long-established wine regions of the Barossa to the north of the state capital, Adelaide, and in McLaren Vale to the south. The Adelaide Hills Wine Region (AHWR), in the hills to the east of the city, is well known to those in the know about wine, but as a wine tourism destination it has a lower profile than its better known neighbours.

In order to increase visitor numbers to cellar doors, the AHWR set about a review of the cellar door experience and the current (2007) Cellar Door Guide. All winery entries in the

guide were rated on the 'likelihood to visit' based on the cellar door entries from 32 individual wineries. The evaluation of the entries took into account the degree to which a 'sense of place' had been developed, the use of descriptive and enticing language, and whether or not a visitor could expect a wine tourism experience, rather than just a wine retail transaction. Many entries in the 2007 Cellar Door Guide focused on the name of the grape from which the wine was produced. The results of this initial analysis (see Table 1) showed that only 4 wineries out of the 32 in the guide rated as 'definite' contenders for a visit; 8 rated as 'probable', 5 as 'possible', and 9 rated as 'unlikely'. There were 6 wineries that were by appointment only (BAO).

The Cellar Door experience was also evaluated during 'secret shopper' visits at each of the wineries listed in the guide that promoted a wine tourism experience. The results of this survey were compared with the results of the initial 'likelihood to visit' analysis and showed that there was not always a positive correlation between the wineries in the 'definite' and

1. Wine Federation of Australia 2008



ABOVE:  
Bird in Hand Winery.

Table 1: 'Likelihood to visit' based on 2007 and 2009 Cellar Door Guide comparison

2007 Cellar Door Guide %	2009 Cellar Door Guide %	Likelihood to visit
12	44	Definite
25	22	Probable
15	0	Possible
28	15	Unlikely

'probable' categories and the value of the visitor experience.

Wine operators in the AHWR region then participated in a workshop that outlined the principles of interpretation and how to develop interpretive themes that told the stories of each winery in a way that distinguished them from each other – the market edge – and that would entice visitors to the various cellar doors for a wine tourism experience.

A variety of genuine stories emerged – breeding grounds for endangered birdlife, an abandoned goldmine and resident artists, to name but a few. The interpretation workshops, combined with the 'secret shopper' visits allowed cellar door owners and operators to see the value in their stories, and in many cases they developed strong themes for interpreting these stories to others.

In early 2009 the Cellar Door Guide was revised with many wineries utilising interpretation techniques to improve their entries in this publication. These entries were then evaluated using the same criteria as in the earlier study.

On this occasion 14 venues out of 32 were now rated as 'definite' sites for visit, 7 as 'probably', 5 'unlikely', and with no ratings in the 'possible' category. There were 6 wineries that were by appointment only (BAO).

The overall 'likelihood to visit' had increased significantly following the use of interpretation in the revised Cellar Door Guide entries (see Table 1).

Examples of the change in the Cellar Door Guide entries between 2007 and 2009 are shown below.

## BIRD IN HAND WINERY

2007 Cellar Door Guide entry: Family owned Bird in Hand winery offers free tastings of award winning wines plus delicious olives and oils with fresh bread. BYO picnics welcome.

2009 Cellar Door Guide entry: Our vines have their feet in gold to create gold medal wines... join us over the old mine to taste olives, oils and wines where they are grown and made.

## SINCLAIR'S GULLY WINES

2007 Cellar Door Guide entry: A hidden paradise nestled in timeless and pristine bush land. Enjoy a taste, a glass or a bottle of these award winning estate grown wines while relaxing under the magnificent candle bark gums.

2009 Cellar Door Guide entry: Discover the wild side of wine. Experience the thrill of black cockatoos flying in at dusk or wander through spring wildflowers in our towering candlebark forest. Enjoy a glass of wine in our eco-certified cellar door.

## MAGPIE SPRINGS

2007 Cellar Door Guide entry: Cellar door at the top of Willunga Hill sells estate grown wines combined with artworks by Roe Gartelmann.

2009 Cellar Door Guide entry: Not to a formula, full of art, intense wine and down to earth attitude. Our cellar door is welcoming – sometimes unruly, always genuine.

The entries in the new 2009 Cellar Door Guide are more enticing and are likely to result in increased visitor numbers. The look and feel of the guide has also changed, with the AHWR itself embracing interpretation techniques, by developing its 'Four Seasons Five Senses' branding.

The Adelaide Hills Wine Region also used interpretive themes linked to the senses in the 'Discover...' tutored tastings at the Crush '09 festival in January, with great success.

This work evaluating the 'likelihood to visit' based on Cellar Door Guide entries before and after using interpretation, was carried out in safer financial times, and the need to attract the tourist dollar is now stronger than ever. As this project was done less than 12 months ago, it is too soon to know how successful these changes will be in terms of actual visitor numbers at AHWR wineries; operators will also need to translate their interpretive themes into visitor experiences and onsite interpretation. However, in the current economic climate, excellent interpretation is giving the wineries in the Adelaide Hills a better chance of wooing visitors to the wineries in the first place, for a memorable and meaningful wine tourism experience. These new world wineries, in an old world landscape, provide an opportunity to share the history and heritage of both the natural and the cultural past during a visitor's wine tourism experience.

**This investigation was part of a Masters research project carried out by Katherine Sutcliffe (postgraduate tourism student) and Professor Jane James, at Flinders University, South Australia and co-operation of the AHWR and the wineries is gratefully acknowledged.**

# KEEPING IT GOING

**Kit Reid considers the cost of long-term maintenance of interpretation schemes.**

When visiting a heritage site, how often have you come across a scrawled note reading 'out of order'? Or badly faded interpretive panels? Or outdated guidebooks, peeling labels, vandalised signage... the list of frustrations continues.

Badly maintained interpretation is sadly prevalent. Sometimes it seems the landscape is filled with the skeletons of interpretation projects past. Part of this can be blamed on funding and staff cuts or an unwillingness to let old projects die. However, too often there has simply been a lack of maintenance planning from the start.

## QUICK FIXES

There are many reasons to change or update your interpretation: for site management reasons; to adjust content or design; wear and tear; broken hardware; vandalism; weather damage, or accidental breakage.

Reactions to these maintenance issues vary. 'Waiting for the next big project' is a common syndrome. Broken equipment sits for years waiting for this mythical project to come along. Managers may be unwilling to invest and the enthusiasm to make small fixes is suppressed. But it leads to a poor experience for visitors.

Small fixes may not raise a site to 'best practice' level, but I believe it is important to define your minimum standards and try not to drop below them. In practical terms, this may mean designing an individual label, replacing a panel unchanged or installing new hardware without tweaking the content.

At Historic Scotland, we look after 345 properties. While there are countless interpretive issues at most of these, we are currently aiming to reach minimum standards at all of these rather than best practice at just a few. Sometimes it is fine to replace one label rather than a case, or freshen up graphics without altering the 3-D design. It may not be exciting, but a simple refresh is often a better use of resources than planning and implementing a major project.

## PLANNING AHEAD

As soon as a concept is developed you should be starting to think about how it will be maintained, the likely costs and whether or not it is possible. If not, should you really be moving it forward? Often a project team consists of those who will not be involved in running the site so insist on a focus beyond swilling champagne at the opening. When interpreters move on, those left on the ground have to deal with the reality for years. The least we can do as a project team is leave a legacy that includes well-considered and financially-supported operating procedures.

Fortunately, there is more of a drive these days to consider sustainability within interpretation projects. Many funding bodies such as HLF require a post-completion maintenance plan: after year one, you should have an idea of the reality of how visitors are enjoying and experiencing the interpretation, and any necessary alterations. After five years, materials may need refreshing or replacing. After five years, you should be considering a full overhaul. Much maintenance is inevitably reactive when

something is damaged or breaks. But as far as possible an organisation should aim for a proactive or preventative approach. This may include service contracts for maintaining hardware, incorporating perhaps quarterly or yearly visits, phone assistance and/or a number of call outs. Consider whether you require separate interpretation service contracts for lighting and audiovisuals or whether general site maintenance contracts will suffice.

Prior to the detailed design stage, assessing the level of a maintenance budget is difficult. Arguably it could be 1-4% per annum of the original interpretation budget depending on the high-tech components. Some organisations will soak reactive maintenance work into a core budget, while others have site-specific budgets.

At Historic Scotland we have budgets set aside for a programme of replacing damaged interpretation, an AV maintenance budget and a Minor Works budget. Sitting alongside project budgets these are used for reactive repairs. Early each year, we list any badly damaged signage, and roll out replacements.

## MAKE IT LAST

Aim to create durable, high quality infrastructure while allowing opportunities for interpretive content to be updated easily. Apply good practice, such as ensuring that the work

and materials are high quality, and record specifications to enable easy future replacement.

Balance the high-specification, durable and costly with low-specification, easily replaced and more affordable. Identify your limitations as well as aspirations; none of us can have it all. With 345 sites we ideally want interpretation with longevity. We simply don't have the resources to make frequent changes. Single-site organisations might prefer a more flexible approach with interpretation that can be changed regularly.

## ROLES AND RESPONSIBILITIES

Identify the responsible parties. After a few years staff may have changed. Write a manual that clearly identifies who (post and organisation) does what and what has to be done. It should set out a cleaning rota and methodology, a checklist (for annual or other scheduled use), a supplier contact list, and clearly defined roles and responsibilities for both reporting and carrying out repairs.

## PANEL IN, PANEL OUT

Finally, ask whether your interpretation materials are still necessary. Too often, we see interpretation schemes growing layer on layer. Accept it is not a crime to remove signs, take out audiovisual displays or decide not to reprint

BELOW:  
St Andrews Castle. Small fixes to damaged exhibitions can increase their lifespan.



guides. Perhaps your trail does not require another panel. Perhaps contacting a partner body and agreeing a single replacement panel is better than adding to an existing melee of signs. It should be cheaper, and it will almost certainly improve the setting and visitor experience.

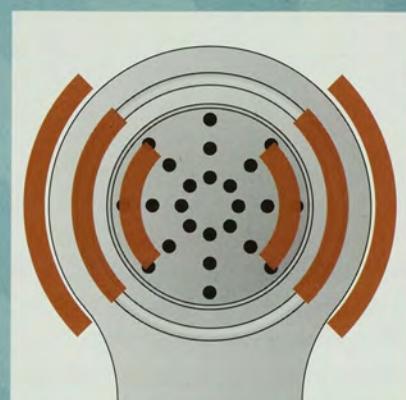
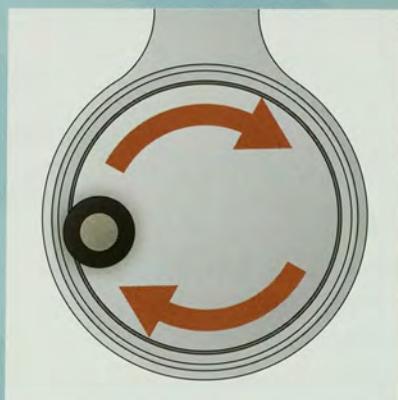
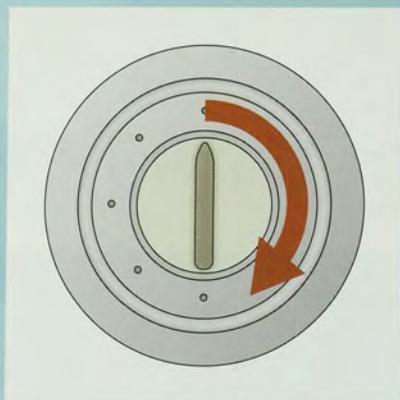
No matter how well you look after your interpretation elements, they will come to the end of their lives eventually. Unlike a project, maintenance never ends.

**Kit Reid is Interpretation Manager: Presentations and Displays for Historic Scotland.**

BELOW:  
Lincluden church. Accept that panels and exhibitions will need to be monitored, maintained and replaced.



# Select. Turn. Listen.



## Solar/Self Powered Sound Store

The U-Turn is a unique, environmentally friendly, self-powered digital sound store that provides audio interpretation in remote areas far from mains power.

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Blackbox-av Ltd,  
25 Aberafan Road,  
Baglan Industrial Park,  
Port Talbot. SA12 7DJ  
Tel: 01639 767007 Fax: 01639 767008  
Website: [www.blackboxav.co.uk](http://www.blackboxav.co.uk)  
Email: [sales@blackboxav.co.uk](mailto:sales@blackboxav.co.uk)

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