I see the Past, Present & Future
existing all at once
Before me.

(Blake, 1820)

INTRODUCTION

This chapter has been formed by three sections examining heritage site interpretation design practice: my design practice and process for the Beaulieu Abbey Kiosk interpretation, case studies of heritage site interpretation design practice and process at three specific heritage sites, chosen for different aspects of similarity to Beaulieu, and existing literature for heritage interpretation design in areas of curatorial practice, design practice and visitor practice.

The first section establishes how the aims of the chosen methodology were fulfilled, providing an explanation and justification of the research, practice and outcomes of the work undertaken at Beaulieu. In Section 2.2, three distinct areas (curating interpretation, designing for interpretation and using and engaging with interpretation) are analysed through the use of three heritage interpretation case studies: English Heritage's Bolsover Castle (Derbyshire), Historic Royal Palaces' Kensington Palace (London) and the National Trust's Lacock Abbey (Wiltshire). The interpretation

design at each of the sites was examined for their design process and methodologies used such as User Centred Design (UCD). Visitor experiences and feedback were explored to understand whether involvement with the interpretation design process enhanced their engagement and experience with the site.

The literature review forms the third section and critically reviews and analyses existing definitions and theories pertaining to design practices in the formation and creation of interpretation at heritage sites. The effectiveness of heritage interpretation design in providing positive, memorable visitor experiences, and how this is measured is critically examined through visitor feedback. The thesis research has originated from reflection on my practice and comparison of practice, a natural process as a designer. The comparison of HSI design processes led to a critical review of literature to investigate and analyse aspects raised from the comparison case studies. The placement of the literature, therefore, has evolved from stages of practice-led research and through the design of the thesis replicating an action research cycle/design process.

The sections have been designed to provide a thorough systematic review of personal experience in HSI design practice, how my practice compared to other HSI design practitioners and curatorial practitioners/organisations, and whether visitors are, or may be, involved in the HSI design process.

2.1. DESIGN CHALLENGES & OUTCOMES

During the practical craft of creating the Beaulieu Abbey kiosk interpretation significant design practice material was generated and collated. Developing the case studies and literature review, design practice and research data was also created and collated.

This research strategy (see Fig.32) was developed to understand how my practice in the creation of the Beaulieu Abbey kiosk interpretation compares to the practice of other professional interpretation designers. I wondered whether interpretation designers working within or with heritage site organisations were regarding visitor involvement in their approach and design process (Crilly *et al.*, 2008:p.22; Rahaman & Tan, 2011:p.107).
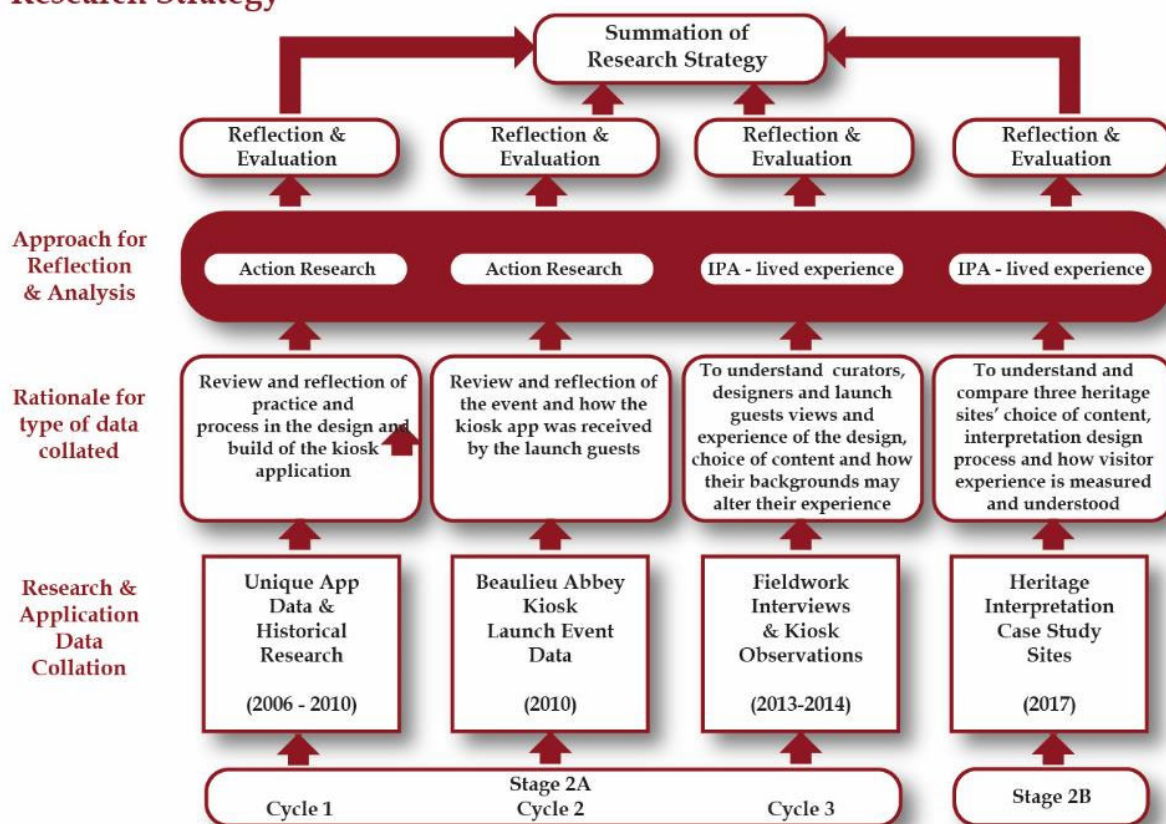
Research Strategy

Figure 32: Research Design Strategy. (Wilson, 2018 ©)

I intended to explore and understand professional practices and processes within heritage organisations and interpretation design, based on my practice, and that of three different heritage site's interpretation design by three different heritage organisations for comparison (National Trusts' Lacock Abbey, English Heritage's Bolsover Castle and Historic Royal Palaces' Kensington Palace). The heritage sites and the specific interpretations were chosen as they were comparable in terms of sites' and process[20] with my process, the response by the stakeholders/owners and visitors on the completion/installation of the interpretations, and reflection on practice by those involved, in assessing and understanding their visitors' experiences. The comparison analysis aided evaluation of current models that exist in heritage site interpretation design.

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[20] The case studies' practices and processes can be viewed as infographic posters at the Viva exhibition and in Appendix M, which provide more detail about each site, the interpretation involved and the 'make-up' of the team(s)
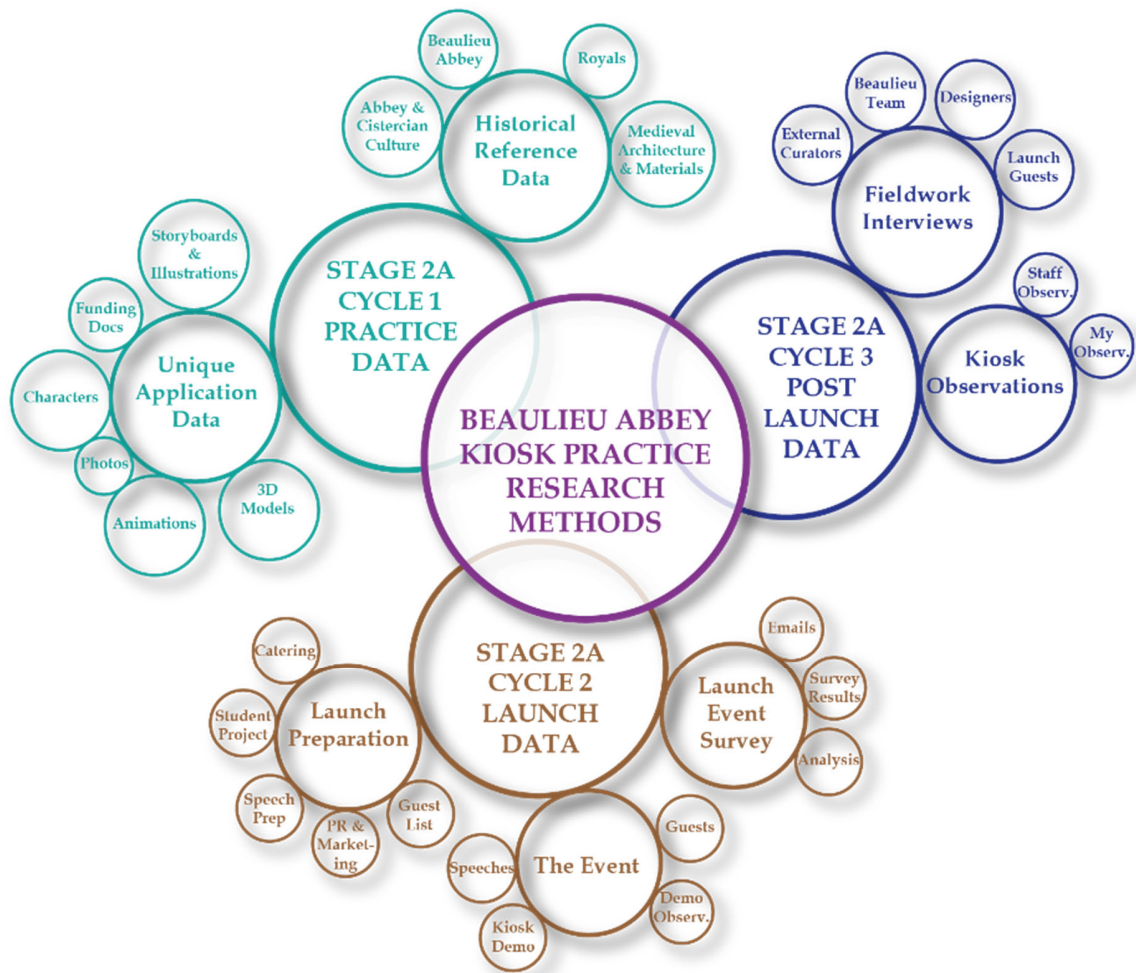
Figure 33: Beaulieu Abbey Kiosk Practice Research Methods & Curated Data. (Wilson, 2018 ©)

The diagram above (Fig. 33) highlights the methods used in relation to my Beaulieu kiosk design practice work cycles. Development of storyboards, illustrations, photographic research, 3D models, characters, funding application and navigation matrix information form a data collation labelled 'Stage 2A Cycle 1' in the diagram (Fig.33) (Gray & Malins, 2004). Underpinning the practice of designing and building the kiosk interpretation, historical research was also critical in understanding how Cistercian monasteries were built, their typical layout, their monastic culture and how the site was used. Understanding why Beaulieu was chosen as an abbey site and by whom, helped in setting the context for the size and significance of the abbey, and in creating the characters that tell the story of the abbey.

'Stage 2A, Cycle 2' collation comprises data from the Beaulieu Abbey Launch, particularly regarding the organisation of the launch, questionnaires completed at the launch, video clips,

photographs, Google analytics data and feedback communicated through email. The feedback and questionnaires from the launch have provided significant information regarding usability, navigation and content.

'Stage 2A Cycle 3' Post Launch data was through interviews with curators, designers and launch guests – as shown in Fig.33. The interviews with the curators/stakeholders at Beaulieu provided insights about relationships with their visitor groups. Interviews with other designers enabled comparisons of method and design models, as well as their relationship with clients and visitors.

Stages 1 and 2 were analysed using an AR approach to understand the effect of a cyclic process used in the design and production of the Beaulieu Abbey project, and the relationship built with the Beaulieu Team. Stage 3 analysis was via an IPA approach, to understand the participants' perspectives and experience relevant to their involvement with heritage interpretation. Through the combined analysis of the three stages, an understanding was reached of the design considerations, processes used and possible assumptions made in the design and development of the Beaulieu Abbey kiosk interpretation (Wilks & Kelly, 2008; Reid, Flowers & Larkin, 2005; Smith, Flowers & Larkin, 2012).

Understanding and reflecting on my design process was a valuable experience and informed how I approached and worked through future heritage interpretation projects (Schon, 1984; Chambers, 2003; McIntosh, 2010). A concern and a significant factor in undertaking elements of my design research was that this is 'my' individual process and not necessarily one that is replicated by other heritage site interpretation designers or can be replicated for larger heritage site organisations such as the National Trust or English Heritage. Nonetheless, the reflection on my design practice in the Beaulieu Kiosk interpretation creation prompted me to build a model that sets out the nature of the relationships and demonstrates how HSI can be improved. In looking for a theoretical 'lens' to help build the model, I needed to understand and evaluate that 'lens' from a number of different perspectives, and therefore conducted case analysis of other HSI design practices. These enabled a comparison of contrasting design processes and research in other contexts.

2.1.1. CYCLE 1 – PRACTICE

In May 2010, the kiosk launch for Beaulieu Abbey museum took place to an invited guest list. The project had taken four years from initial concept presentation.

The Beaulieu Abbey project required the development of a small team who were able to provide skills additional to mine at different times through the project. Scoping the project was necessary as part of the funding application process, which also required a break-down of how the project would be managed over a set amount of time, and who may be involved (Veverka, 2000; Black, 2005; Ziemann, 2014; Tilkin, 2016). Developing the funding application, or 'business plan' for the project, involved a steep learning curve in understanding processes for providing necessary grant application information. The process, supported by Business Link Wessex, took approximately a year, involving several iterations to perfect it to the required format. The thoroughness resulted in an award for my Business Link mentor for the best Micro Project funding application that year (2008), although predominantly providing a comprehensive method for producing the Beaulieu project (see Fig.34 below for an overview of the methods used):
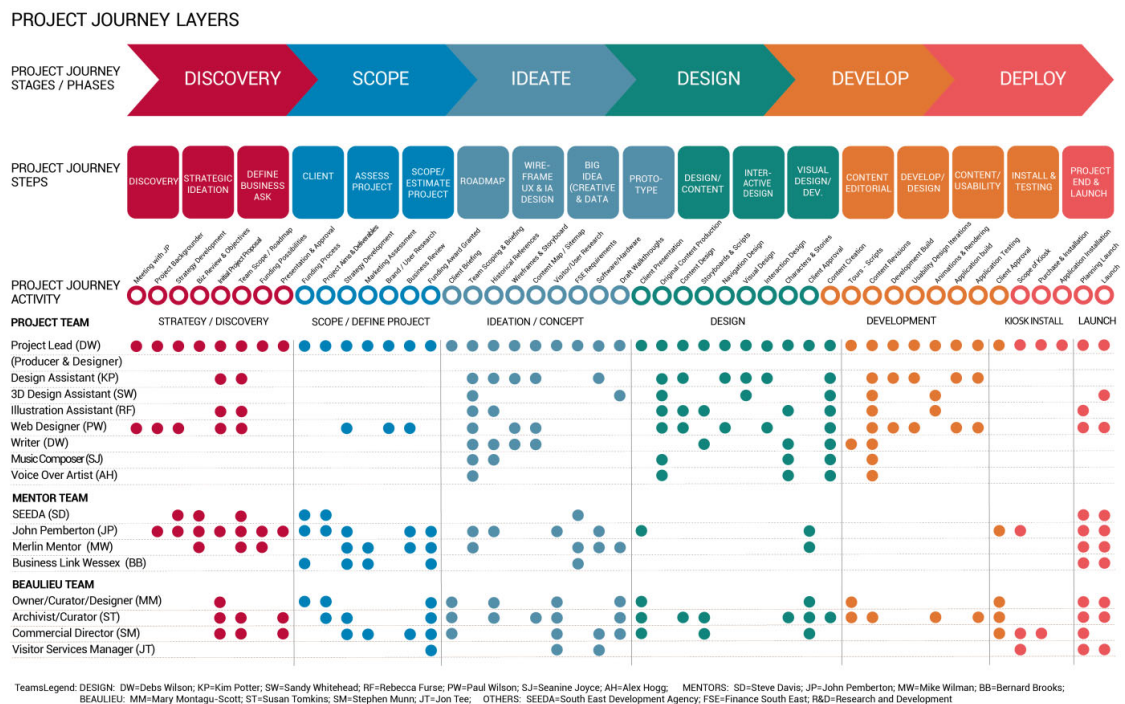

Figure 34: Beaulieu Abbey Project Journey, Processes & Methods Used. (Wilson, 2018)

Once the Beaulieu Abbey kiosk interpretation project was completed, reflection of my design process highlighted how important the relationship had been between myself and the Beaulieu curatorial team. Working closely with the team proved to be invaluable with expert information

about Beaulieu's Domus and Palace House visitors readily available. The visitor information helped to support design decisions for the range of content available via the kiosk interpretation, although it was not the same as having involved visitors in the decision making process (Ham, 2013).

The experience gained in developing the Dunster Castle project[21] was significant in understanding how crucial it was to have a team that understood your project, and, therefore, to be able to communicate ideas and concepts clearly (Gulliksen *et al.*, 2003). An in-depth understanding of the processes and methods used in the Beaulieu Abbey kiosk interpretation developed further through the collation and reflection of the varied forms of material produced at each stage of the process (O'Brien, 2001; Chambers, 2003; Gray & Malins, 2004). The following subsection provides information regarding the two categories of material collated and used for reflective analysis: kiosk interpretation material and historical reference information.

2.1.1.1. UNIQUE KIOSK INTERPRETATION MATERIAL & HISTORICAL REFERENCE INFORMATION

This body of material was formed by a combination of sketches, illustrations, storyboards, documents, presentations, photographs, animations and 3D renders, which were organized in a timeline via 'blog style' posts, an example can be seen below in Fig.35. The material produced and collated has been curated and forms part of a website called *'The Talking Walls – A Reflection of Practice'*[22]

Creating the timeline of events and development of visuals required for the kiosk interpretation, required reviewing and re-cataloguing archived material. As a funded project, regular reports on progress, timesheets, invoices and costings were also required; therefore, it was necessary to retain correspondence to reference in the regular reports and reasons for delays, purchases and time tracking. The material has aided in reflecting on my practice, the decisions made in taking ideas forward and the process by which this was done.

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[21] See Chapter 1 for more information

[22] The site includes the development of practice from the outcome of my Masters in Interactive Production – The Talking Walls – Dunster Castle. Information about this project and how it progressed to the Beaulieu Abbey kiosk is shown through emails, images and documents in a timeline blog post style format. *http://thetalkingwalls.co.uk/wordpress/*
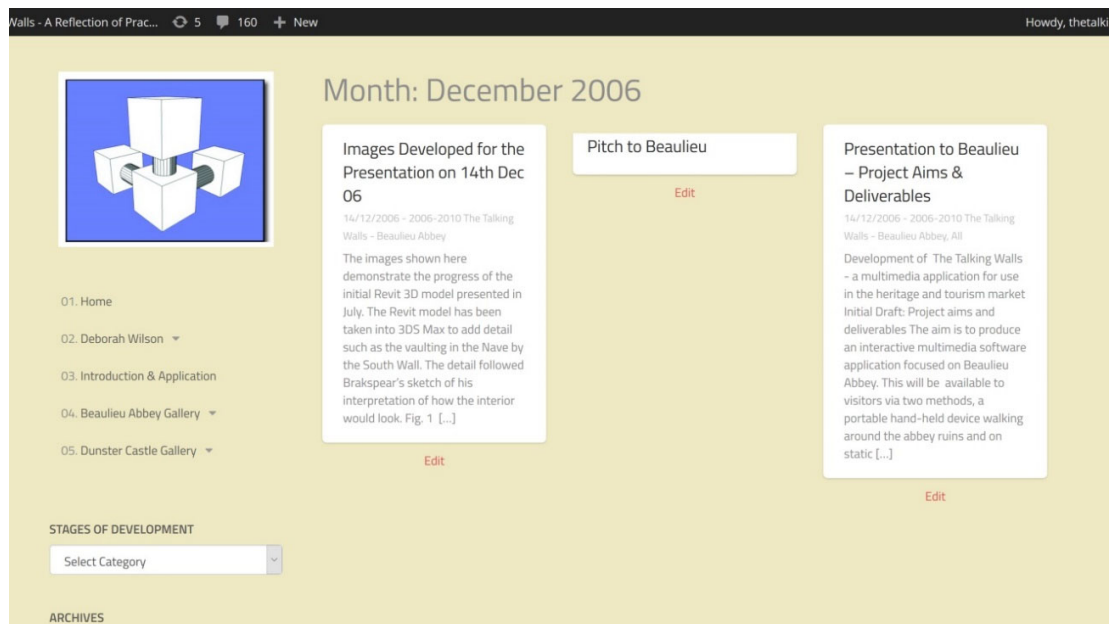
Figure 35: Example of Blog Style posting of development timeline of the practice element of the thesis. (Wilson, 2018 ©)

There are two separate but linked areas of archived material:

1. Unique Kiosk Interpretation Material – which includes:

   a. Correspondence leading to and throughout the development of the Beaulieu Abbey kiosk interpretation with the Beaulieu team, Finance South East and design team

   b. Storyboards, sketches, illustrations and renders created in the development of the kiosk interface, the characters' stories and the 3D abbey

   c. Personal reference photographs taken at Beaulieu

2. Historical Reference Information – which includes:

   a. Visual references to Cistercian monasteries and monks

   b. Brochures, guidebooks and artistic references of and by Beaulieu regarding the Abbey, Palace House and village

   c. Historical reference books and online historical archives relating to the history of the abbey and the people involved with the abbey

   d. Online photographs

The different sets of visual reference and unique material produced in the development of the kiosk interpretation can be found on the following 'Beaulieu Abbey Gallery' web link[23] with

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[23] http://thetalkingwalls.co.uk/wordpress/?page_id=112

correspondence ranging from 2006 to 2010 available via the blog posts[24], and a series of Diary of Events Calendar Spreadsheets for 2006, 2008 and 2010.

2.1.1.2. REFLECTION IN ACTION

Working through the archive, sifting and collating my practice material highlighted aspects forgotten over the period involved and how they are now echoed through the more recent case studies' and literature. For the initiation of the kiosk interpretation, the consequence of being part of several networks was clear. For example, an approach to Beaulieu was made through John Pemberton[25], who was interested in The Talking Walls project[26] and how it might work for providing visuals for a book he was writing. A chance meeting led to working with John to draft a proposal to Beaulieu for a 'Talking Walls -Beaulieu Abbey project, similar to the Dunster Castle project. John was a Mentor for the Solent Enterprise Hub working with Arthur Monks[27]; I was a Mentoree of the Southampton branch working with Stephen Davis[28], with Mike Wilman as my Merlin Mentor for The Talking Walls heritage projects. It was only through John and his connections at Beaulieu that we were able to approach them and propose the 3D virtual Abbey interpretation project. It was also through the Enterprise Hubs and Mentor networks that funding for the project was possible, working with John and Mike, and then Bernard Brooks at Business Link Wessex[29] on the funding proposal for the SME R&D Micro Project grant[30] award. Without the help and support of the different networks, the project would, most probably, not have taken place. This aspect of the project to do with the importance of business and professional contacts and of mentoring would not have been as clear had review and reflection not taken place.

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[24] *http://thetalkingwalls.co.uk/wordpress/?cat=8*

[25] John Pemberton lives near Beaulieu and had been researching the Abbey in relation to his property which may have been one of the monks' outlying farms. Through his research, he met Susan Tomkins as a member of the Beaulieu history group, the archivist at Beaulieu. As a significant figure of the New Forest, he had also met Mary Montagu-Scott. John was therefore important and influential in the Beaulieu Abbey project.

[26] The Talking Walls Ltd was a small business which was one of several companies that had been granted a Mentor to support development and growth of the business.

[27] Arthur Monks was the Hub Director for the Solent Enterprise Hub, South East Development Agency (SEEDA) based at Technopole, Portsmouth.

[28] Stephen Davis was Hub Director for the Southampton Enterprise Hub, South East Development Agency (SEEDA) *(http://webarchive.nationalarchives.gov.uk/20081106003119/http://www.seeda.co.uk/About%5FSEEDA/Research%5Fand%5FEconomics/)*

[29] Bernard Brooks was recommended by Stephen Davis to work with me on the funding application after early drafts were not quite fulfilling the format required by SEEDA/Finance South East (FSE). This was also my first meeting with Dr John Richardson, who led the Innovation Hub in which Bernard worked. John Richardson now works at the University of Winchester in Business Management and is Co-Director with me for the Centre of Enterprise, Design and Innovation.

[30] The Micro Project grant was a small business research and development match-funded grant which could be applied for via the South East Development Agency.
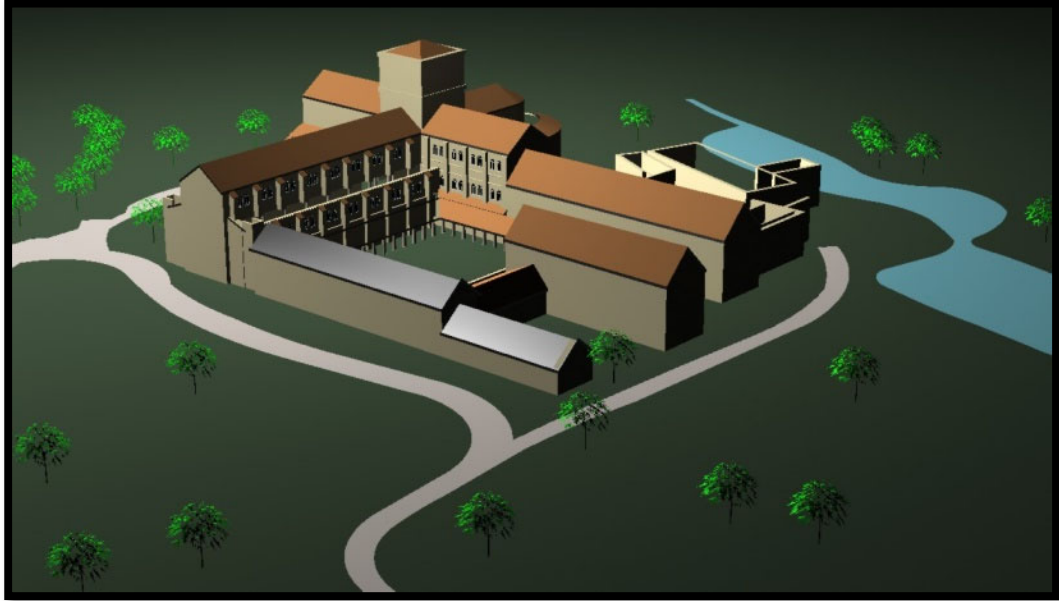
Figure 36: Fly-through Animation Mock-Up of Beaulieu Abbey for Presentation to Beaulieu in Dec 2006. (Wilson, 2006 ©)

The initial proposal meeting took place in May 2006 for which a presentation and simple mock-up of the Abbey buildings with a walk-through was developed. The mocked-up draft can be viewed in the presentation available on this link: *http://thetalkingwalls.co.uk/wordpress/?p=766* or by 'ctrl+click' on the image above (Fig.36).

The scene was created in Autodesk Revit[31] from reference to the following conjectural sketch by Brakspear in Fowler's (1911) book on Beaulieu Abbey (please see Fig. 37 & 38). The conjectural sketch and the floor plan were crucial historical references for the layout of the buildings and look and feel of the architecture. Further information was provided in Fowler's book, a series of 15 sketches,[32] demonstrating how the abbey may have looked in different areas, based on the remaining ruins.

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[31] Autodesk Revit is industry standard architectural building information modelling (BIM) software used by a majority of architectural practices. By using Revit, and importing the floor plan sketch, it took two days to build the draft abbey whereas building the same in a standard 3D modelling programme such as 3DS Max, would have taken at least twice as long. Revit was not generally in use for historical 3D replications of ancient buildings at the time, it was therefore interesting to see how well it compared to traditional methods using Autodesk AutoCAD or 3D modelling programmes.

[32] Please see this link to view the sketches involved: *http://thetalkingwalls.co.uk/wordpress/?page_id=1140*

Figure 37: 'A Conjectural reproduction of the buildings of [Beaulieu] Abbey' illustration (Brakspear, in Fowler, 1911)
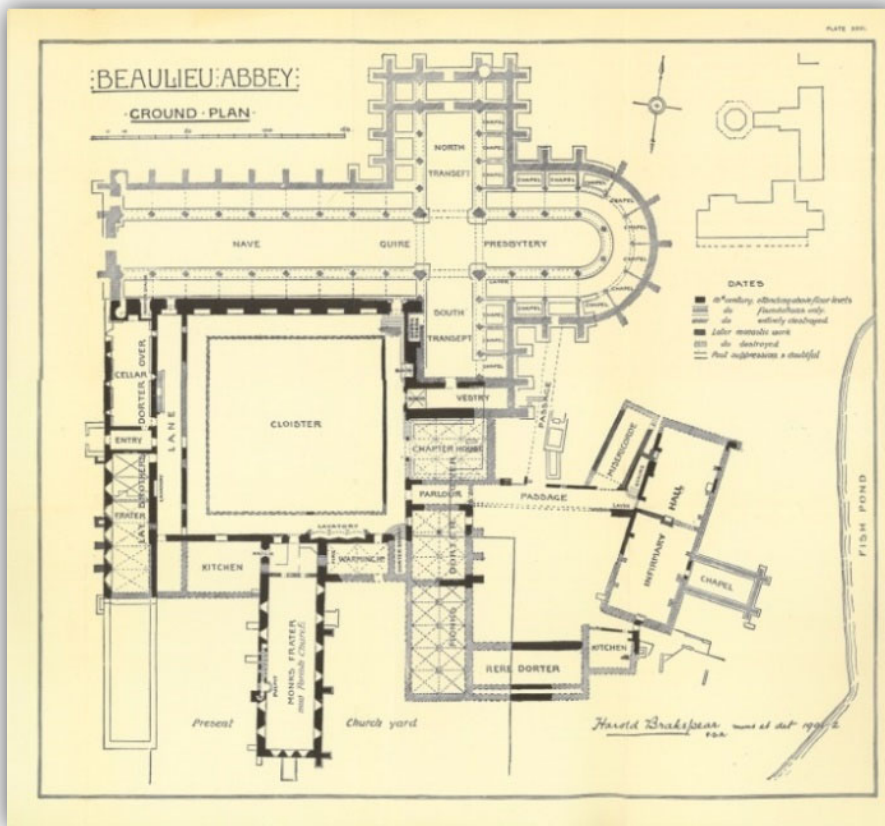

Figure 38: Ground Plan of the buildings of Beaulieu Abbey showing date information of the remaining ruins and the layout of what was once the Abbey Church and infirmary (Brakspear, in Fowler, 1911)

One of the sketches showing the vaulting and columns of the south wall of the nave was particularly crucial for recreating an element of the interior of the 3D abbey for the Beaulieu presentation in December 2006 (see Fig.39). The sequence of images demonstrates the use of archival images for 3D interactive environments where a deeper engagement with historical data may occur. These images and the basic walk-through captured Beaulieu's imagination for what could be provided for their abbey site and led to their interest in the project going forward.
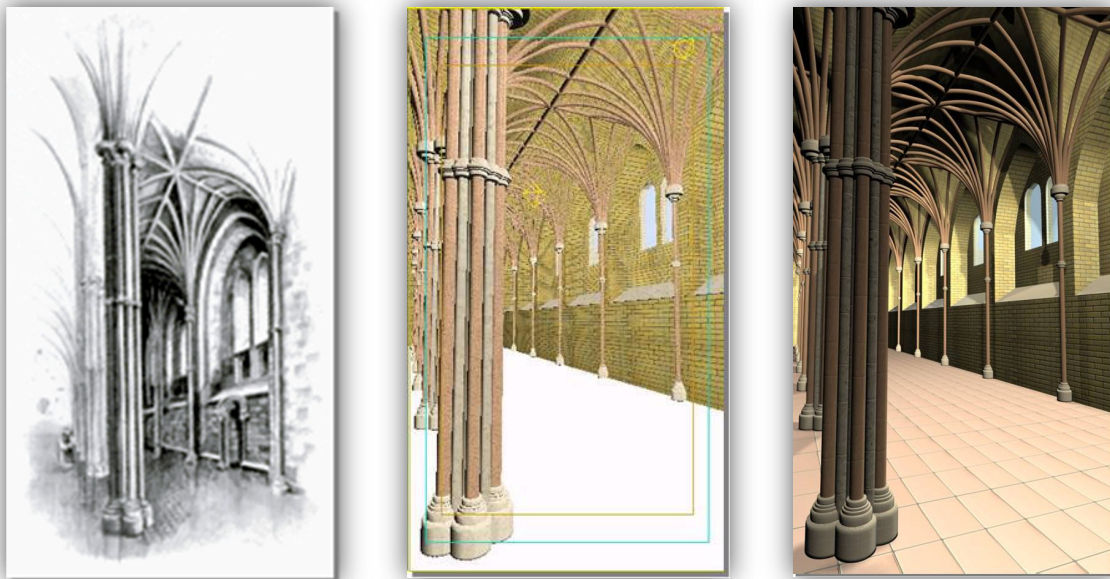

Figure 39: Sequence of development interpreting archival sketch information (Fowler, 1911) to a draft 3D interactive model for a presentation to Beaulieu in December 2006. (Wilson, 2006)

Additional information regarding the heights of the different abbey buildings was more of a challenge. The floor plan (Fowler, 1911) provided a scale of the site, but not of the heights involved. On-site measurement and photographic reference of the remaining buildings were required. Further historical references for verification in sizes and discussions with the Beaulieu archivist, Susan Tomkins, were critical in being able to rebuild a credible 3D version of the abbey.

Historical research[33] for references to typical Cistercian abbeys and monasteries was a necessity for validating the visual information and understanding the medieval construction methods, materials and differences between Cistercian and Benedictine Abbeys, monastic lifestyles, roles and hierarchies. Research continued throughout the project, with each area of the application

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[33] Primary resources included: Fowler, 1911; The Lord Montagu of Beaulieu, 1952; Hockey, 1976; Larkin, 1974; Saul, 1997; Given-Wilson, 1996; and Sternberg, 2013.

requiring historical resource and reference for creating an authentic experience when engaging with the kiosk interpretation.

The Beaulieu Abbey project officially started in May 2008 once funding had been awarded through a Micro-Project grant. The funding application had taken approximately one year with the help and guidance of my mentors. This was an essential guiding document to the project and is included on the website[34] for reflection and analysis.

There were two significant issues in the subsequent production and development elements. The first impacted the development of the character scripts, and subsequent voice-over recording and editing. Beaulieu had been working on an audio tour script with an external company. The tour script involved several iterations and stakeholder approval which resulted in the script not being available as the basis for the characters' individual tours until the November prior to the initial project end date of the 5th December 2008. The audio tour script provided the preferred visitor navigation points crucial for animating the flow around the abbey. The characters' tours would also follow the same points and flow, with the content at each point re-written to reflect the role of the character, i.e. the Infirmarian Albert talking more about his work in the infirmary than King John.

The second issue was in purchasing the kiosk. The purchase was an agreed responsibility for the Beaulieu team; their financial contribution to the project. 2008-09 had been a slower time for Beaulieu in terms of visitor numbers, which affected budgets for additional expenditure such as the Beaulieu Abbey kiosk. Agreement was made that the project would still be completed for February 2009, and made available as a website only until the kiosk was purchased and installed in early 2010. A positive impact was that the delay allowed further 3D renderings and enhancement to the 3D abbey model, fact sheets, lifestyle sheets and interface, resulting in an increased depth of historical information available through engagement with the kiosk interpretation and website.

Both issues were out of my control and required adaptation and permission from Finance South East (FSE) to the original project schedule[35].

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[34] _http://thetalkingwalls.co.uk/wordpress/?p=1626_

[35] The original project schedule and amended Gantt Charts can be viewed on these links:
http://thetalkingwalls.co.uk/wordpress/?p=1873 & _http://thetalkingwalls.co.uk/wordpress/?p=1876_ &
_http://thetalkingwalls.co.uk/wordpress/?attachment_id=1870_

Network connections were also instrumental in quickly putting together a team for different areas of production. Each member of the team was known via other industry areas I had been involved with, for example, Seanine Joyce, composer and producer for the medieval music was a fellow 2010 Digital Horizons' participant. Prior knowledge of the team members, their experience with similar work and their skillsets/abilities allowed for a more immediate process than working with a team from which the only experience and knowledge known about them was from their curriculum vitae and interview.

The team members mostly worked from their premises; therefore, regular briefings were critical with updates communicated via email. This worked well for all involved, although on reflection, it would have been more companionable working together in a shared space. This would also have allowed a greater cross over and sharing of ideas and skills (Black, 2011).

Although knowledge of the type and demographic of visitors had been provided by Beaulieu's visitor services team and Tomkins, who led the Live History tours for school parties, I had not engaged with actual or potential visitors in scoping my design. Similar to the Dunster Castle project, I had built personas of typical visitors based on the information provided by Beaulieu. The personas were enhanced through an empathic design process i.e. stepping into their shoes (Kouprie & Visser, 2009; Postma *et al.*, 2012a), in this instance:

- a middle aged female interested in ancient buildings and medieval history
- an 11 year old female interested in technology and exploring history using technology
- a retired male academic with knowledge of medieval monastic buildings

Gauging the level of material that would engage each persona shaped the kiosk interpretation's content and the different tones of voice required (Gadamer, 1960; Overbeeke *et al.*, 2003). I found this relatively straightforward having visited several historic houses with my daughter and mother, experiencing/engaging with the interpretation available, yet difficult in defining the range between the levels of information.

2.1.2. CYCLE 2 - LAUNCH

Once the Beaulieu Abbey kiosk interpretation was completed and the kiosk installed, a promotional launch was planned for an invited guest list. To assist with the launch planning, a group of four MA Marketing students from Southampton Solent University[36] chose to research and develop a proposal report for The Talking Walls-Beaulieu Abbey's kiosk interpretation launch. The students' report 'The Talking Walls' Launch Proposal' (2010) can be found here[37].

Figure 40: Launch event with me (left), Mary Montagu (middle), and Lord Montagu (right) at Beaulieu on 19th May, 2010 (Wilson, 2010)

The Launch took place in the afternoon on Wednesday 19th May, 2010, with a speech by Mary Montague, accompanied by her father, Lord Montagu (see Fig.40 above), explaining the purpose of the kiosk interpretation and as an introduction to my demonstration of the content. The speeches can be found in two parts on YouTube using this link[38].

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[36] I was an Associate Lecturer on the MA Marketing programme at Southampton Solent University at this time; the opportunity to provide live client projects for the MA students was encouraged, therefore I had provided a brief for planning the marketing of the launch. This was one of five similar projects provided by companies for the students to choose from, with the students receiving mentoring from the clients and the lecturers under the guidance of Mike Wilman, their senior lecturer.

[37] MA Marketing Students final report for the kiosk interpretation launch at Beaulieu: *http://thetalkingwalls.co.uk/wordpress/?p=1629*

[38] The launch speech by Mary Montague (part1a): *https://www.youtube.com/watch?v=gS9pyOZJVhU*; my launch speech (part 1b): *https://www.youtube.com/watch?v=nIDPVXwv3CQ*

As part of the launch, a qualitative survey was designed by the Southampton Solent University MA Marketing students. The questions were driven to primarily elicit the launch guests' experiences of their use of the Beaulieu Abbey kiosk interpretation, and to gauge response to the new interpretation in format, ease of use and content. Feedback was also sought via discussion with the guests. Informal observations of guests using the application also took place. The survey and observations were important in obtaining feedback of the event. The data collated assisted in gaining an understanding of early users' experience with the application, and which content areas were most engaged with.

2.1.2.1. LAUNCH PLANNING AND EVENT MATERIAL

The launch planning consisted of a collaboration between the Beaulieu Team, their Marketing and PR department, their catering team 'Leith's', the MA Marketing students and myself. Once a date was agreed, the Beaulieu marketing and PR team provided details of the information they required, which the MA students were able to work with and produce outcomes against. In collating the information, records highlighting these crucial processes were retained.

There were two areas of archival information collated for this section:

1. Launch planning – which included:

    a. Correspondence with the Beaulieu team (inc. catering, marketing and PR), Southampton Solent MA Marketing students, University of Winchester Digital Media students, Finance South East and supporting companies regarding the use of handheld devices
    b. Promotional material such as press releases, invitations/leaflets and medieval music DVD and storybook insert
    c. Invited guest list and final attendee list

2. Launch event – which included:

    a. Speeches to launch the event
    b. Demonstration of the kiosk interpretation
    c. Observations of guests using the kiosk
    d. MA Marketing students' Guest questionnaire

Launch Planning:

There were four strands of correspondence and documentation forming an insight to the considerations required for planning an event such as the Beaulieu Abbey kiosk interpretation launch. The four strands consisted of:

- The Beaulieu team – Margaret Rowles, Beaulieu Enterprises PR Officer
- MA Marketing students – Eleni Elliott, Patricia O'Driscoll, Madalina Carastoian and Chantelle Legg
- Leith's at Beaulieu – Gemma Moody, Sales Manager
- The Talking Walls UK Ltd – Debs Wilson

The most relevant document for reviewing the details required to be actioned by the Beaulieu Team on the event day was the Special Visit Sheet (SVS)[39] produced by Margaret Rowles' PR and Marketing team (please visit this link[40] or view Appendix E). The press release was also written by Rowles' team with three photos[41] taken of the kiosk and the Beaulieu Live History 'Abbot' arranged and produced by the Beaulieu Press photographer, Tim Woodcock (Fig.41).

Figure 41: Press photograph with the Beaulieu live history abbot looking at the new kiosk and application on the 10th May 2010 (Woodcock, 2010)

The initial brief for the MA Marketing students was provided in February 2010 for their semester 2 live client project, having chosen to work with The Talking Walls - Beaulieu Abbey launch event. Through meetings with the students and email correspondence, the four students produced a report, a guest list, and a questionnaire for feedback at the event. The latter three items are available to view on this link[42] and provide a good resource for reflection on processes used and timeline for the event planning.

The documentation for the email invitations and flyer alerts for the event made use of the 'KubeMatrix,' which I designed for navigating the Beaulieu Abbey kiosk interpretation content. The front face of the KubeMatrix device cubes were translated to flat squares and the three layers retained for providing the launch date, time and the centuries covered within the interpretation content for the invite and flyer artwork (see Fig.42 below). The strap line was designed to explain the possible process of engaging with the content. The overall 'look and feel' for each element of marketing material followed the branding used within the application's interface:

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[39] Correspondence leading to this document has not been included, primarily because the data sheet provides the same information.

[40] *http://thetalkingwalls.co.uk/wordpress/?p=1637*

[41] The set of photos can be viewed on *http://thetalkingwalls.co.uk/wordpress/?p=1647*

[42] *http://thetalkingwalls.co.uk/wordpress/?m=201003*

Figure 42: Invitation 'postcards' designed (front and back) to reflect the kiosk interface with event information (Wilson, 2010 ©)

An additional flyer was created in March 2010 to advertise the Beaulieu Abbey kiosk interpretation was going to be available soon[43]. The two documents required approval, particularly the information on the back of the invitation, which needed to display the correct logos for the organisations involved in the kiosk interpretation and its launch. The procedures required developing the designs for promoting and reminding people of the event were not new or difficult, the difference was the range of permissions required, and it is this reason the artwork has been added to the data to be reviewed and analysed.

As the launch guests departed, the four Southampton Solent University MA Marketing students provided each guest with a DVD as a reminder of the day, and as a 'Thank you' for completing the Feedback Questionnaire. I designed the compilation, creation and artwork for the DVD case and storybook. The 'Abbey Characters' DVD contained music composed by Seanine Joyce for each of the abbey characters and a storybook presenting the nine characters. The artwork involved can be found on this link[44], and the different characters' music on this link[45]. The DVD also required

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[43] The flyer can be viewed on this link: *http://thetalkingwalls.co.uk/wordpress/?p=759*

[44] DVD artwork can be viewed on this link: *http://thetalkingwalls.co.uk/wordpress/?m=200904* and in the appendices.

[45] The music specifically composed by Seanine Joyce for the nine characters introduced through the Beaulieu Abbey Kiosk interpretation can be found on this link: *http://thetalkingwalls.co.uk/wordpress/?p=709*

approval by Beaulieu, who were very pleased with the 'keepsake', seeing it as a viable product they would be able to sell in the Beaulieu tourist information centre. The work put into developing the storybook insert, the graphics for the DVD cover and disc was extensive and time consuming. The reason for inclusion in the material collation is the unexpected favourable response by Beaulieu for what was an additional input and outcome during the delay in being able to launch the kiosk interpretation.

Launch event:

The data for the launch event consists primarily of video taken at the event, for Mary Montague-Scott's introductory speech, followed by my speech and demonstration of the kiosk interpretation. The video footage can be viewed on the link provided here[46] for Mary's speech and here[47] for my speech and demonstration. The transcripts can be found on this link[48].

After the speeches, I was able to observe guests using the kiosk. From later conversations, my mentoring team had also observed the guests using the application and were able to discuss their experiences with me.

The MA Marketing students' Guest Experience questionnaire (Fig.44) was completed by seventeen of the high profile launch guests with comments as feedback. The profiles of the launch guests included representatives of the New Forest District Council and New Forest National Park Authority, English Heritage, SEEDA and Winchester Cathedral, local Universities, Museums and Enterprise organisations such as Business South East and Set Squared. Although not all guests completed the questionnaire, there was a sufficient sample to analyse, for review and reflection regarding their experience and how the kiosk interpretation may be improved. The guests were able to answer anonymously, which was an important consideration due to the high profile attendees, although they could tick their age range and gender. The mix of questions was deliberately kept brief i.e. only seven questions of which only three required a brief comment. The questionnaire sought to discover the guest's experience in their use of the application and whether they had seen/used a similar application elsewhere. This was a key question in how the application was received and whether it was unique. If it proved to be quite unique, then it would be a more viable product for investment. The questionnaire also asked how the guest would

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[46] *https://www.youtube.com/watch?v=qS9pyOZJVhU*
[47] *https://www.youtube.com/watch?v=nIDPVXwv3CQ*
[48] *http://thetalkingwalls.co.uk/wordpress/?m=201005*

improve the application for use at Beaulieu Abbey. It is only through people using the application that improvements can be highlighted and considered for future iterations; consequently, it was crucial to ask this question of the guests who had experienced the application. Figure 43 is one of the completed questionnaires, the remainder can be found in Appendix F and on this link[49].

The verbal feedback, observations and questionnaires form part of the qualitative primary data collation which is reviewed and analysed in Chapter 3 Evaluation and Discussion.

2.1.2.2. REFLECTION IN ACTION

The launch of the Beaulieu Abbey kiosk interpretation was the culmination of a project spanning a period of three years. The event was personally momentous in promoting my concept in HSI for a site as prestigious as Beaulieu and Beaulieu Abbey. It was also of immense significance for the

Figure 43: Example of a completed 'Experience Questionnaire' by one of the Launch Event guests (Wilson, 2010)

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[49] *http://thetalkingwalls.co.uk/wordpress/?p=1858*

organisations that had been part of the development via funding, advice, research and support, most importantly Beaulieu.

Ensuring the event ran smoothly meant considerable planning and organisation which would have been difficult without the support of Beaulieu's staff in PR, marketing, catering, front of house and the management team. I had not considered that their support would be available although I should have realised that as an event held at Beaulieu, the 'event' team would ensure requirements for a successful event would be in place. The opportunity for the MA students to work with the Beaulieu team in understanding what was acceptable at a Beaulieu event provided a unique experience, although not always one the students were in accord with. For example, the students' initial ideas were to have students dressed in costume to greet guests. In principle, this may have been a good idea but for Beaulieu, the idea would have conflicted with Beaulieu's Living History team; a team of costumed guides trained in the history of Beaulieu's Palace House and Abbey. It was difficult to discourage this idea, and required confirmation from members of the Beaulieu team that the idea was not to be taken forward. The reason was to ensure costumed students were not mistaken for trained costumed guides, thereby possibly forming a detraction of the Living History brand, which, the students in their enthusiasm to do well, did not appear to understand. The confirmation required from the Beaulieu team rather than being informed by me, was a valuable insight and reflection as the students' client, and for possible future clients they may have.

The conversational feedback from the guests was positive and encouraging regarding the uniqueness of the KubeMatrix device. The depth of content received excellent feedback, in particular the 3D reconstruction of Beaulieu Abbey, and the range of characters available as 'tour' guides. The feedback generally was inspiring.

The Launch data has been collated and added to 'The Talking Walls – A Reflection of Practice' website[50], forming a chronological visual record of practice for the Beaulieu Abbey kiosk interpretation. The Launch data also forms part of the primary research which has been analysed and discussed in Chapter 3 Evaluation and Discussion.

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[50] *http://thetalkingwalls.co.uk/wordpress/?page_id=2*

After the launch, the kiosk interpretation remained installed within the Domus as part of the Beaulieu Abbey museum exhibition for approximately two years. The main reason for its discontinuation was due to the kiosk platform breaking and Beaulieu's decision not to replace/repair the computer element that had crashed.

Figure 44: Beaulieu Abbey Kiosk (Wilson, 2010)

During the two years, I observed different groups of visitors using the kiosk. The observations proved insights about areas chosen to engage with, which primarily were the tours, quizzes and character stories. The tours would not always be played completely through; instead different areas would be chosen such as the Nave, and re-chosen with a different character, possibly to understand the difference in each character's 'story' of their life at the abbey. Although the content was at one generic level, the individuals and groups of visitors interacting with the kiosk appeared to engage with the information, and appreciate the range of information available. The observations were supported by the feedback from the FoH staff, who also reported that groups of international students (14+ age range) would try to close the application to access the internet rather than engage with the application. The kiosk was 'closed off' for this not to happen, even so, the older student groups were still seen trying to break the system and access the web.

It had not occurred to me that this may happen; it took several additional visits to completely secure the system to prevent this from happening. The misuse may have contributed to the kiosk finally failing. Had visitors been able to access the content via their own or 'loaned/hired' devices provided by the site, this would not have been an issue, therefore an important consideration for future kiosk interpretations.

An additional factor that may have contributed to the system failing, was frequent moving of the kiosk to cater for hospitality events held in the Domus, evidenced by being in different positions in my observation visits. The kiosk was sensitive to movement, i.e. perhaps moved to an uneven area of flooring and therefore being rocked slightly during use, or simply mishandled whilst being moved. The larger monitor mounted on the top of the kiosk (see Fig. 44) needed to be stable at all times, but being away from Beaulieu this was not something I could control.

The website version of the kiosk interpretation still exists, although it requires the use of Adobe's Flash Player, and can be accessed on this link: *http://www.thetalkingwalls.co.uk/Beaulieu/*

Professional feedback

Feedback about the kiosk interpretation was necessary for understanding whether navigation through the content using the KubeMatrix template was intuitive, if the choice of nine different characters to guide users around the virtual abbey over three time slices, and whether the content was at a level of information suitable for a range of ages. The informal observations of visitors using the kiosk interpretation were beneficial in this respect. Comparing my practice and design process in crafting the kiosk interpretation, I needed to speak with other interpretation designers and curatorial professionals. To further evaluate visitors' engagement and experience with use of the kiosk interpretation, I chose a selection of the launch guests who had been able to use the kiosk, and had been able to speak to during the launch event. These launch guests and the other participants involved in the interviews, provided positive feedback on their use, understanding and experience of the kiosk interpretation. The positive feedback was the 3D models and time slices, the choice of characters (and accompanying medieval music), the novel KubeMatrix for 'jumping' to the different times involved in the different spaces, and the multimedia rich content providing life styles, historical facts and cultures of the Cistercian abbey and its inhabitants. There were three negative aspects that were common across the different forms of feedback: expectations that it should have been available on mobiles (PDAs or Smartphones), only one level of age-range available and queueing to use the one kiosk.

2.1.3.1. REFLECTION IN ACTION

The three sets of interviews consisted of the Beaulieu Curatorial Team, the Design Team and a selection of Launch Guests forming the third team. There were two additional participants who were external heritage professionals. The interviews helped understand more about the people I had been working with during the Beaulieu project (DiCicco-Bloom & Crabtree, 2006). It was crucial to understand the participants' backgrounds to determine their level of experience of working with heritage interpretation. Participants genuinely seemed to appreciate the opportunity to reflect on their different journeys, understanding the connections between the paths taken to the resulting experience and knowledge. Having previously worked with or met all participants except one during my role as a designer/mentor/ educator, the interviews were more relaxed. A rapport built with each person through the interview, especially as the participant started to relax more into the interview. On reflection, this may have been more about being able to talk about areas with which they were familiar and had an obvious interest in. Furthermore, the interviews held were at their choice of place, either work or home.

Using NVivo for analysing the data was a steep and interesting learning curve, particularly so in recognising assumptions made in my initial themes. The data 'nodes' created from the various sources, highlighted areas which were more prevalent than I expected, and raised areas I had not considered. The three iterations of thematic analysis and subsequent word clouds sparked a realisation that there may be an additional outcome to explore for future research in the form of a 'heritage interpretation design' specific taxonomy. A common vocabulary which the curators, designers and visitors recognize and understand may also help to ensure possible barriers in communication are negated whilst working in multi-discipline teams.

This section analyses the three case studies[51] that have comparable features to my work on the Beaulieu Abbey kiosk interpretation. The three case study interpretations were chosen as examples of bespoke personalisation and storytelling of the building's previous inhabitants, designed to capture visitor interest and engagement – as was the case of the Beaulieu Abbey interpretation. The case studies were also chosen to involve different heritage organisations to compare process and methods of communication. A further consideration for choosing the sites was their process of involvement with visitors and the local community in the interpretation design. They were sites I had visited previously, prior to the interpretations being installed and remembered noting I would have liked to see more information about the people that had lived there. The most significant difference to Beaulieu was that the sites are owned by larger organisations, therefore possibly had access to larger design companies or in-house design teams. The following infographics provide an outline of each heritage site, the reason they were chosen and the interpretation analysed:
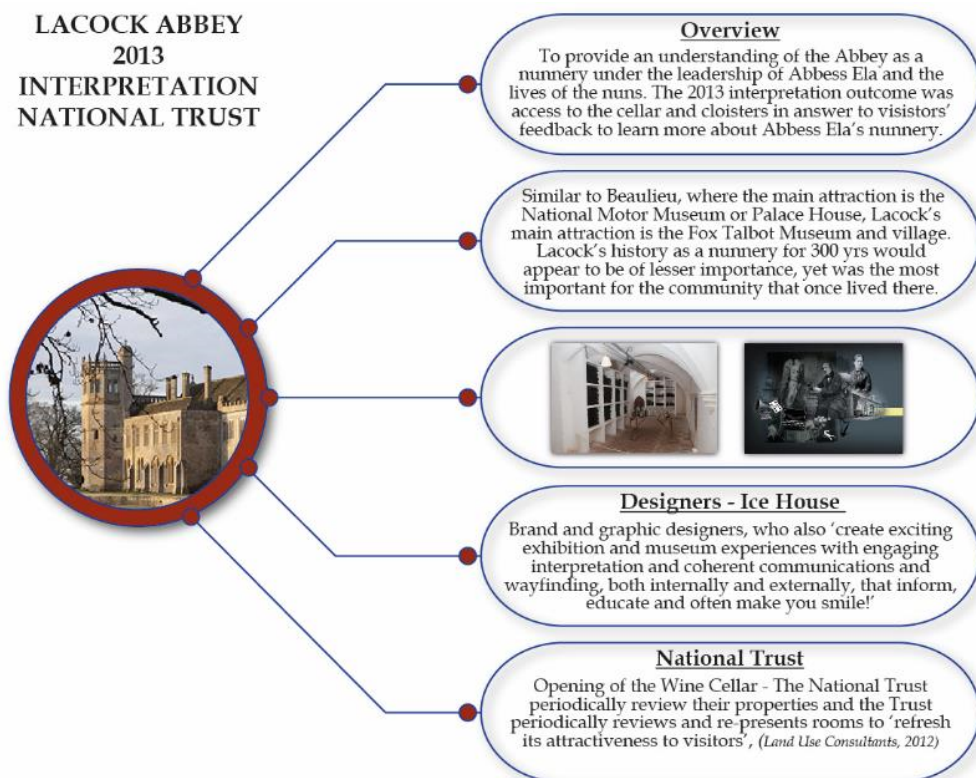
Figure 45 Lacock Abbey 2013 Interpretation Infographic (Wilson, 2018)

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[51] The case studies are English Heritage's 2011-12 interpretation for Bolsover Castle, Historic Royal Palaces' 2012-13 interpretation for Kensington Palace and the National Trust's 2013 interpretation for Lacock Abbey. Infographic posters outline the sites and the interpretations reviewed which can be found in Appendix M and in the online Viva Exhibition.

BOLSOVER CASTLE 2011 - 2012 INTERPRETATION ENGLISH HERITAGE

Overview
To provide an understanding of the lifestyle of William Cavendish and his family in the Castle's 17th-century heyday, specifically during a royal visit. The new visitor experience interpretation to achieve this was in the form of a digital application.

Bolsover Castle was chosen primarily for the multimedia application as a design comparison to the Beaulieu Abbey kiosk interpretation. The storytelling of the Castle's heyday via the multimedia application, Cavenish's family and the exhibition were elements similar to Beaulieu Abbey's kiosk application.

Designers - ATS Heritage
Contracted to replace the existing audio guide with a multimedia guide and app for the site. They 'are passionate about enhancing experience' and 'always mindful of the end user and hope their experience will be improved.' *(ATS Heritage, 2015, pp.15–16)*

Leach Colour & Bivouac
Leach Colour for a 'dramatic exhibition within the Riding House Range introducing the visitor to the many passions in William Cavendish's life.' *(Leach Color, 2014)* Bivouac for Graphic Interpretation, Management and Creative Direction for the interpretation design.

Figure 46: Bolsover Castle 2011-2012 Interpretation Infographic (Wilson, 2018)

KENSINGTON PALACE 2012 - 2013 INTERPRETATION HISTORIC ROYAL PALACES

Overview
To provide an understanding of the different royals who lived in Kensington Palace. The 'Enchanted Palace' and 'Welcome to Kensington Palace' interpretations were creatively produced specifically for the period of renovation work at the Palace.

Kensington Palace was chosen primarily because of the interpretation/renovation project that would transform the Palace to become an 'exciting, engaging and inspirational visitor experience'*(Historic Royal Palaces, 2009)*. The specific similarities are the smaller teams involved and the flexibility/creativeness of the brief.

Designers - Various
The range of artists, designers and exhibition companies involved in the Enchanted Palace and Welcome to Kensington Palace interpretations was extensive: Coney, Wildworks, Chris Levine, Joanna Scotcher, Jane Darke and Stitches in Time.

Enchanted Palace Concept
The Front of House staff felt strongly that visitors want to know more about the people who had lived at the Palace rather than make believe or fairy tale scenarios. The Curators went with their suggestion, and the Enchanted Palace was created *(Humphreys, 2012)*.

Figure 47 KensingtonPalace 2012-2013 Interpretation Infographic (Wilson, 2018)

The analysis will be via three sections: Curating Interpretation at Heritage Sites, Designing for Interpretation and Using and Engaging with Interpretation. Small, privately owned heritage sites may have teams which rarely include a designer to work alongside their curator, whereas larger organisations usually have an internal team of designers, with a team of curators. Relationships, therefore, between a curator and designer at larger organisations, such as English Heritage and the National Trust, may be more familiar, consistent and cohesive when working on an interpretation project. Based on the Beaulieu Abbey kiosk interpretation experience, I found the relationship between the curator and designer and how an interpretation is crafted for the visitor, is essential in forming the design. Petrelli et al. (2016) discuss three successful museum interpretations in which curators, designers and technologists proved working closely together enhanced the format of interpretation. The results were engaging, interactive narratives providing visitors with unique experiences. Workshops and meetings throughout the Beaulieu Abbey kiosk interpretation design process enabled collaboration, communication and testing of ideas (Petrelli *et al.*, 2016; Ciolfi, Bannon & Fernström, 2008; Maye *et al.*, 2014; Hornecker & Ciolfi, 2019; Heath & vom Lehn, 2009). The analysis of three selected heritage site case studies will reveal whether opportunities for frequent discussions between the different parties existed.

This also gives insights regarding whether curators craft a heritage site's interpretation project with specific goals in mind, what these are, and if they are 'directed' by stakeholders. Furthermore, the analysis will review how goals are formed for the individual heritage sites, and in their development, what assumptions, influences and constraints have taken place before being passed to the designer.

The first section (2.2.1) critically reviews and analyses the curatorial processes used for developing HSI concepts, and their expected goals and outcomes. It also explores the communication and design process between the curation team and/or organisation and design company/designer when forming HSI.

In Section 2.2.2, the focus is on the interpretations created by the design companies involved in the three case studies. Who the design companies are and why they were chosen is essential for understanding the style of interpretation already in the minds of the different curatorial teams and how they have conveyed this.

In section 2.2.3, the focus is on the visitors, who they may be, the reasons why they choose to visit the case studies' heritage sites, and the reactions experienced from their visits. This section also

aims to understand the visitors' views of the individual interpretations, and their engagement and/or experience with the designed interpretation. How reviews and feedback may be provided and measured has been explored in an attempt to understand whether the type of interpretations provided at the sites, were seen as a success by the visitors.

Audience (Visitor) advocacy (Burch, 2013) is also introduced and reviewed to determine whether the use of visitor advocates would help the HSI design process. Additionally, how advocates or visitors may be involved and when is reviewed through the use of a user-centred design process. With the growth of user-generated content and user reviews, such as Tripadvisor, pressures are being placed on visitors to continuously review, provide feedback and 'be involved' in the content they may engage with at heritage sites.

The synthesis of the three case studies forms an understanding of the HSI design practice at the three heritage sites and aids in the evaluation of current models that exist in heritage site interpretation design.

2.2.1. CURATING INTERPRETATION AT HERITAGE SITES

2.2.1.1. DISSEMINATION OF KNOWLEDGE AND EXPERIENCE

There is considerable research (Kotler & Kotler, 2000a; Coffee, 2008; Ray, 2009; Soren, 2009; Trant, 2009; Janes, 2010a; Thomas, 2010; Easton, 2011; Rounds, 2012; Davis, Horn & Sherin, 2013; Louw & Crowley, 2013; Owens, 2013; Proctor, 2013) that discusses a growing shift from the traditional style of curation to that of a more audience participatory and storytelling style. Expectations and suggestions encompass the need for developing and engaging a wider public and specific communities. Areas discussed are heritage sites managed by business and marketing professionals; social media engagement with audiences; new media-enhanced artifacts and interpretation via new media technologies. Within these discussions, there is an acknowledgement that curators may be required to work alongside other professionals with specific remits such as digital content, information data, social media and collection managers (Ciolfi, 2012a; Ham, 2013; Black, 2011; Avram & Maye, 2016; Heath & vom Lehn, 2009; Giaccardi, 2012a; Ciolfi, Bannon & Fernström, 2008).

The organisations highlighted in the case studies recognize the shift that is occurring and are adapting their processes (Thurley, 2005; Cowell, 2008; Jenkins, 2013; Department for Culture Media & Sport, 2014b). For example, English Heritage announced their strategy 'Making the Past Part of our Future' for 2005-2010[52], which was to *'create a cycle of understanding, valuing, caring and enjoying. For each part of the cycle, we have adopted strategic aims. These are underpinned by a further aim – to make the most effective use of the assets in our care.'* (Thurley, 2005). The Bolsover Castle interpretation was for a '*a broad 17th century rich, human interest story*' (English Heritage, 2013), to engage visitors with the Castle's inhabitants of its heyday (Ptolemy Dean Architects, 2013). Stories surrounding the visit by King Charles 1 in 1634 were used to create games and virtual tours 'to be as inclusive as possible' and '*break down barriers to participation*' (ATS Heritage, 2014b).

The National Trust revised their strategy in 2004 after a consultative process that reviewed best practice across Britain (Taylor, 2006a; Jenkins, 2013). Their new strategy comprised several aims and a 'Vision for Learning'[53]. The underlying philosophy of their interpretation approach *'is one*

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[52] English Heritage Strategy 2005-2010, see Appendix H for detail
[53] Nation Trust's 2004 Strategy - Vision for Learning, see Appendix I for detail

that understands who our visitors are and offers them a range of experiences so that every visitor leaves feeling that they have enjoyed themselves and enriched their lives either consciously or subconsciously, unlocking the doors to inspiration and knowledge' (Taylor, 2006a:p.102). The interpretations in place at Lacock Abbey center on stories of a particular time and people. In the Abbey, the story of Abbess Ella, forms one theme of interpretation (Thornber, 2015). In the Fox Talbot Museum, it is of William Fox Talbot and photography (National Trust, 2015a). Lacock Abbey, therefore, includes two very different eras and people, enabling 'each' visitor to leave with new knowledge and/or having enjoyed their visit, similar to Beaulieu Abbey with the National Motor Museum.

Historic Royal Palaces' (HRP) 2014 Trustees' Report, states: '*We are engaged in an extensive programme of change and development – in the way we present the palaces, help people explore stories, provide services and engage people's senses*' (Mackay, 2014:p.4). The Kensington Palace 2010-12 interpretations can certainly be said to have engaged people's senses from the visitor feedback and blog articles written (Humphreys, 2012; Woollard, 2015; May, 2015). The dissemination of knowledge regarding the Royal family members, mostly the princesses who lived at Kensington Palace, have been said to be done in an evocative, heart-wrenching storytelling narrative (SEGD, 2015; Rank, 2013). The visitors wishing to know more about Victoria, Margaret or

Figure 48: Scriptorium Monk at Work, (from Lacroix)

Diana would have found it difficult not to be caught up in the unusual stories and snippets evoking what their lives were perhaps really like (Rank, 2013; Craig, 2015). HRP also claims to '*do everything with panache*' perpetuating the '*spectacle, beauty, majesty and pageantry*' of the *Palaces they maintain* (Mackay, 2014:p.2). With 4 million visitors across their properties in 2014, HRP handles the largest visitor attraction with regards to built heritage sites in England (Mackay, 2014). The design of the interpretations used to impart knowledge of the monarchy and the societal impact of the Royals cannot have been easy, yet HRP make this one of their aims.

The curatorial teams required at each of the organisations would need to have adapted to the new strategies being put in place, and able to communicate more widely, more creatively than perhaps previously. Roles such as HRP's Jo Neil's, Senior Creative Programming and Interpretation Manager, does not have Curator as part of her title, but her role is generally that of a curator and manager (Neill, 2015). As a manager, her communication skills would need to be at an excellent level. As an Interpretation Manager, communication skills are even more important.

English Heritage has Territory Interpretation Managers (TIM) under their Curatorial Department (Draper & English Heritage, 2012) which consists of four separate units: Historic Properties, Archives, Curatorial and Conservation, and Education and Interpretation, TIM sits within the Education and Interpretation Unit. The skills required as a TIM include '*excellent communication*' and '*experience in leading multi-disciplinary teams*' (English Heritage, n.d.). This would place TIM in a different category than a Curator i.e. a TIM assists in providing the interpretation, not curating (English Heritage, n.d.).

The National Trust also has several different categories with regards to roles. There is a Head of Digital, the Director of Brand and Marketing (for an in-house marketing team), a Web Editor, Visitor Experience and Communities Manager, Digital and Social Media Consultant and other similar posts (Ghosh, 2015; Scott, 2015). They work alongside a team of Curators, i.e. Curator of Pictures and Sculpture, Furniture Curator and Libraries Curator (Spectator, 2014). These are curators that have a specific collection to look after and understand in depth. With a thorough knowledge of their own area, they should be able to communicate clearly to whoever they are working with, an expert or a layperson. Ewin (2012) believes curators thoroughly understand a collection's value to the community, their context, strengths and weaknesses, and the importance academically. Curators '*keep our heritage alive through their understanding of cultural objects and*

their meanings' and are '*keepers of the flame: story tellers, who can bring the past to life, can explain or can provide the knowledge for communities to come together*' (Ewin & Ewin 2012).

Ewin provides a link to the Historic Royal Palaces' (HRP) Curators' Team Communication Plan, with a query regarding what others thought of this plan and whether other sites should put their case to their own teams and organisations in the same way. The document acts as a reference for the curatorial team and clearly outlines their role and function within HRP, with individual curator's comments highlighting areas such as caring, researching and communicating. Interesting to note is their '*Where we've come from and where we're going*' section that emphasizes change from '*dictatorial, elitist, fuddy-duddy, possibly mad and certainly eccentric*' to '*explorers or navigators, investigating history in order to bring the past and the cause to life for all types of audience*'(Ellner, 2013).

Although there are many heritage organisations and curators working towards a more inclusive sharing of knowledge, there may be a few who have found this more challenging. According to Bradbourne (1997), there has been a need for curators to be more active in their action to provide an informal learning environment for at least 25 years. He also advised '*Instead of looking at our job as creating 'exhibits' to show visitors scientific principles, we had to look at them as 'supports' that helped structure and sustain interaction between users*.' (Bradbourne, 1997:p.10) Almost a generation later, Bradbourne's advice is mostly being practiced in a few of the larger heritage sites.

Reviewing the case studies, it was noted that the National Trust, English Heritage and Historic Royal Palaces have extended their interpretations to include a variety of platforms to engage their visitors and provide memorable experiences. They are achieving this by adding snippets of life and elements of storytelling in different creative ways, across a variety of platforms, disseminating knowledge about the lives and therefore history of the site. The interpretation at Bolsover Castle, Kensington Palace and Lacock Abbey may be classed as what has become more widely known as 'transmedia' – elements of stories being told via different methods or platforms, using the unique properties of the platform or method involved to make their own contribution to the overall story (Phillips, 2012; Weitbrecht, 2011; Kidd, 2016). Examples are The Enchanted Palace interpretation (2010-11) at Kensington Palace and their more recent interpretation 'Welcome to Kensington

Palace'. In this later interpretation, the curatorial team involved a theatre company, Coney[54], who in turn employed artists and designers to portray stories of members of the Royal family using various methods and platforms. A game was created for the King's room which involved being able to '*choose-your-own-adventure story for [the] audience to play their own game of court, meeting performers and unlocking stories along the way*.' (Coney, 2013)

2.2.1.2. ASSUMPTIONS, INFLUENCES AND CONSTRAINTS

Over the last 30 years, the government has reduced its financial support to heritage organisations, which has, in part, caused changes in how they engage with their audience (Thurley, 2005; Jenkins, 2013). Visitors are now required to purchase tickets for many sites that were once free to access. The expectation of the visit's value has, therefore, risen, generating the heritage site's need to consider how this may be accomplished. The 'visitor-centred' museum is the result for many organisations, with managers marketing their museum as an attraction rather than an archive (Williams, 2009; Ballantyne & Uzzell, 2011; Poole, 2014). Organisations such as English Heritage and the National Trust have focused on creating their heritage sites as properties that people want to visit for the day with tea shops, gift and garden centres as part of the attraction (Hems & Blockley, 2006).

By encouraging higher visitor numbers through an extension of what is on offer, the heritage site can achieve higher levels of funding and/or revenue, although it fundamentally changes the reason for visit (Ballantyne & Uzzell 2011; Williams 2009; Re:Source The Council for Museums Archives and Libraries 2001). Curators and Interpretation Managers are, therefore, being placed in a position where they are required to market their collections, artifacts or site, at the same time as conveying information in a variety of ways to engage a more inclusive audience.

Accepting there are stakeholders, government and professional obligations and constraints for most built heritage sites, how do the organisations such as the National Trust, Historic Royal Palaces and English Heritage decide on what is going to be portrayed and become the basis for the different interpretations at their properties? Research has shown different methods for across the organisations:

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[54] Coney are interactive theatre makers based in London. *http://coneyhq.org/about-us/*

- The National Trust creates a Statement of Significance for each of their properties to ensure future focus is based on the local importance and main historical era(s) of the site involved. Their research is influenced by discussions with the local community and forms a 'blueprint' for future interpretations. (Taylor, 2006a)

- For Historic Royal Palaces, their '*cause is to help everyone explore the story of how monarchs and people have shaped society, in some of the greatest palaces ever built*' (Mackay, 2014; Collections Trust, 2014). Their decision appears to be from research rather than local community consultation.

- One of English Heritage's objectives is '*to promote the public knowledge and enjoyment of the National Heritage Collection*'. Another is to provide '*high quality interpretation based on research and scholarship*' for the public to learn about the history of England (Department for Culture Media & Sport, 2014a). English Heritage also aim to '*encourage communities to capitalize on their distinctive local heritage*' (English Heritage, 2009a) using Territory Interpretation Managers (English Heritage, n.d.). Their decision appears to be from regional consultations, primarily internal.

Through the Statement of Significance, the National Trust clearly shows an engagement with the importance of the property held by the local community. For HRP's properties, there is a much wider audience, national and international, due mostly to interest in the British monarchy. The 2012 interpretation for Kensington Palace was marketed as a 'Palace for everyone'. For this interpretation, HRP's brief to external design companies was to create '*radical new interpretation of the stories of Kensington Palace that would give their audience new ways to connect to the people and stories that populated the palace at the height of its glamour and power*' (Coney, 2013). HRP's Head of Interpretation, Gould stated '*Visitors should be enabled to explore an exclusive (and not elitist) journey… Witty and thoughtful use of scale might help to dramatise. …We will blend the 'real' with the 'unreal' or 'hyper real'… And present these powerful stories in contemporary ways*' (Gould cited in Gaffikin, 2012). Neill[55] talks about the collaborations and commissions involved for the 2015 landmark year interpretation 'Hampton Court 500'. One of the projects they initiated and developed was to tell the story of the 500 years of Hampton Court in a day (Neill, 2015). There is further research that highlights the basis for HRP's interpretation concepts is composed within the organisation and the interpretation team's knowledge of the

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[55] Jo Neill is Senior Creative Programming and Interpretation Manager, Historic Royal Palaces, working across all five properties.

Palaces, not involvement with their visitors (Gaffikin, 2012; Marschner & Mees, 2013; Historic Royal Palaces, 2011a). There is evidence of seeking approval by 'community groups and local people' for the Kensington Palace 2012 'Welcome to Kensington – A Palace for Everyone' interpretation proposals, but this would assume the proposals did not involve visitors at the initial concept phase (Historic Royal Palaces, 2009).

English Heritage also relies on the curatorial and interpretation team's knowledge of the site as the basis for their interpretation concepts. The core of English Heritage (EH) is to maintain and preserve the public owned buildings for future generations to enjoy (Thurley, 2005). With financial constraints resulting from reduction in governmental budgets, EH has needed to re-evaluate how they conserve the 409 sites in their care. By adding visitor centres with restaurants and shops, they were able to increase income, which in turn allowed them to restore more properties for visitors to enjoy. The restoring of properties for visitors to enjoy appears to be the basis of their interpretation concepts, alongside expert knowledge from their '*top historians, curators and archaeologists'* (Thurley, 2013). Through research reports, conferences and surveys such as 'Missing Out' (English Heritage, 2009b), 'Taking Part' (Department for Culture Media & Sport, 2014b) and 'Visiting the Past - An analysis of the drivers of visiting historic attractions' (Wineinger, 2011), EH is able to build an understanding of who visits their properties and why. They are, therefore, incorporating knowledge regarding visitors but this is not engaging or involving them in the ideation for interpretations at their sites. As a result, there is still an element of assumption on behalf of the visitors when forming an interpretation project.

Although there is considerable research involved by each of the organisations in understanding why their visitors want to spend time at their properties, and where, there does not appear to be involvement of visitors in determining the interpretation concept. The National Trust's Statement of Significance is determined by involvement with the community, importance of particular time slices and remembered local history. It does not mean the visitors are involved at the beginning of the interpretation. The 'Welcome to Kensington' interpretation received mixed feedback from visitors, some, mostly families, really approve of the mix of interpretations and storytelling, others have left negative feedback comments such as '*I was pretty disappointed they had made such a beautifully historical building so kitschy*.' (Kurt, 2011 cited in Humphreys, 2012:p.13). The mixed feedback may be due to assumptions in what would provide a good visitor experience and who the audience may be. Having sought to include families, HRP hoped their traditional visitor base would also engage with the creative storytelling they employed (Humphreys, 2012; Gaffikin,

2012). HRP's Worsely[56] (2012), explains '*Some parts will appeal to more traditional visitors but we also need to target a younger audience*' (Hardman, 2012); visitor feedback proved this was not the case.

In attempting to reach a wider audience, English Heritage and the National Trust's focus appear to have switched from curated artifacts to the ability to provide a backdrop and story for a 'grand day out' family experience (Thurley, 2005; Taylor, 2006a). Bolsover Castle and Lacock Abbey's interpretations involved placing visitors in a bygone era when owners were in situ, and had just 'popped out'. Rooms at Lacock House were staged to leave an impression that the visitors were walking in on 'a moment in time':

> "*I particularly liked the final room in the house which is dressed as if a shambolic party had just left the building. The spilt wine and wig left on the seat made me feel like the previous occupants were far closer than 100 or so years ago.*" (Selman, 2012).

Figure 49: Room scenes at Lacock House (Selman, 2012)

The story of Ela, the Countess of Salisbury, is a fundamental part of Lacock Abbey's history, as is the Fox Talbot Museum, yet her life and its importance in shaping Lacock Abbey is possibly overlooked in the popularity of the photography museum. Two previous (2013) interpretations were developed to help visitors visualize and understand the Abbey as known by Ela. The first was the opening of the cellar to reveal the vaulted undercroft that may have been guest accommodation at the nunnery (Lacock Unlocked, 2012; InfoBritain, 2013; National Trust, 2014).

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[56] Lucy Worsely, Senior Curator and Historian, Historic Royal Palaces

The second was to enhance information about the cloisters with new interpretation panels, reinforcing the story of Ela's abbey and subsequent use in the Harry Potter films (Thornber, 2015).

The vaulted cellar interpretation at Lacock Abbey was partly in response to visitor queries about the life of the Abbey's nuns (National Trust, 2014) yet also in response to the National Trust's 2012-13 strategy to improve the number of visits to their properties. One of their main aims stated for interpretation is to ensure content is '*bespoke to the property…. themes and stories are rooted in the place*' (Taylor, 2012). Lacock Abbey visitors wished to know more about the Abbey, where the original site existed, and the lives of the nuns. By opening the vaulted cellar and displaying how the space may have originally been used by the nuns, it was easier for visitors to visually understand their conditions. The newly opened space, showing the medieval vaulting mixed with later use as a wine cellar, provides more atmosphere and resonance than just 2D portrayals on information panels. Sonia Jones, Lacock Abbey's House and Collection Manager[57], stated:

> '*not only will it enhance the experience of visitors to the furnished Abbey Rooms, but the wine cellar is also another part of the abbey where it's possible to see the layers of architectural history that subtly reminds us how the use of the building has changed over the last 800 years*' (National Trust, 2014).

The National Trust has responded to visitor comments and feedback to provide further information about the life of the Countess of Salisbury and her nunnery. There does not appear to be evidence to prove visitors were involved in the planning of the interpretation chosen to portray this, other than listening to feedback and comments provided.

The EH interpretation at Bolsover Castle covers significant '*alteration and reinstatement of lost historic features*' (Ptolemy Dean Architects, 2013) and a variety of interpretations. The aim was to tell the story of its heyday in the 17th century, bringing life back to the castle with important elements such as the stables and thereby improving the visitor experience. An extensive feasibility study was undertaken by Ptolemy Dean Architects (2013) which focused on four areas under consideration:

- '*Reinstatement of the wall walk parapet.*
- *Unblocking of the historic balcony doorways.*

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[57] Sonia Jones was also one of the attendees at the Beaulieu Abbey kiosk launch

- *New glazed doors to an historic garden room within the Wall Walk.*
- *Reinstatement of the historic Garden Room floor levels'*
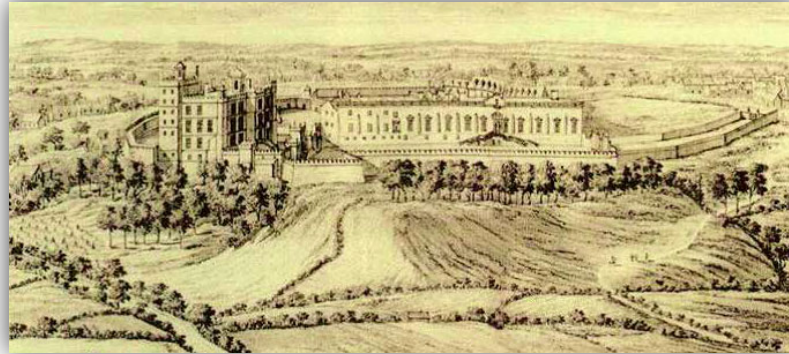
(Ptolemy Dean Architects, 2013)

Figure 50: A detailed C17th drawing of Bolsover Castle (Ptolemy Dean Architects, 2013)

Figure 51: Bolsover Castle seen from the west with the Little Castle on the left and the Terrace Range on the right hand side
(copyright: Martin Bignell Abipp, Ptolemy Dean Architects, 2013)

The choice of which elements of the Castle site were to be included in the alterations were thoroughly researched by Ptolemy Architects based on what would '*reinstate the historic appearance of Bolsover Castle as a rare survival of the age of chivalry*' (Ptolemy Dean Architects, 2013) and improve physical access to enhance the visitor experience. The Ptolemy (2013) report clearly states the proposed alterations needed to adhere to specific policies[58] and their guidelines, in addition to English Heritage's project expectations and feasibility study to ensure conservation and accessibility for all.

Alongside the architectural alterations and repairs, EH invited interested design and/or exhibition companies to tender for a choice of interpretations across the site which would enhance the 17th

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[58] National Planning Policy Framework (2012), the 'saved policies' of Bolsover District Local Plan (2000) and The Historic Environment Supplementary Planning Document (2006)

century heyday storytelling. EH's overall vision for their properties is to '*be true to the story of the places and artefacts*' through '*careful research*' to bring history to life by '*thinking creatively*' to surprise and delight people via '*vivid, alive and unforgettable*' experiences (English Heritage, 2015). This was, therefore, also the premise for the interpretation at Bolsover Castle. The curatorial team specified areas they required design companies to consider, via a Service Contract[59] (English Heritage, 2013). The requirements included:

> '*audiovisual experiences (talking head, video, projections, soundscapes, smell diffusers), models and interactive displays, graphic and 3D design and build, object displays, reproduction dressing of historic spaces including painted and fabric wall hangings, reproduction costumes and furnishings.*' (English Heritage, 2013)

It was interesting to note there was no specific detail regarding content or narrative, other than a broad 17th century rich, human interest story in the tender invitation. As a design brief, this meant the design agencies/designers applying for the tender had a broad remit in how they were able to portray their vision of 17th century Bolsover. ATS Heritage, a leading audio and multimedia guide company, were one of the winning tenders with their proposal to provide a multimedia guide and app which would '*break down barriers to participation*' and '*be as exclusive as possible*' (ATS Heritage, 2014b). The design team produced a family and adult tour suitable for the 'predicted

Figure 52: One of Cabinets of Curiosity (Leach, 2015b)

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[59] English Heritage Service Contract for Bolsover Castle was advertised on Tenders Daily Contract (TED), 28th March 2013. Only one day was allowed for expressions of interest via a questionnaire. Invitations to tender were then announced on the 6th May 2013. The companies then had up to Easter 2014 to design, produce and install their interpretations.

visitor profile' provided by English Heritage (ATS Heritage, 2015). The two visitor profiles were classed as 'Culture Seekers and Experience Seekers' (ATS Heritage, 2014b). It is not clear how the profiles were initiated or determined (i.e. although the use of personas, or other knowledge or assumptions that may have indicated the types of visitor, etc.).

Another successful tender was by Leach Colour, an interpretation and exhibition design company. Leach pride themselves on creating thought-provoking and memorable experiences for visitors (Leach, 2015a). Their multi-skilled team provided an exhibition for two areas of the Castle, the Riding House Range and Little Castle, conveying some of William Cavendish's many interests and passions. It would appear Leach worked closely with English Heritage, but no evidence of working with the intended visitor profiles. The website provides clear information about how they work with their clients, and highlight their confidence in providing engaging experiences for their visitors (Leach, 2015b).

Leach Colour sub-contracted to several artists and designers including design company Bivouac. Bivouac is experienced in HSI design and illustration. Their remit was to provide 'eye-catching banners', artwork for the interactive boxes and cabinets of curiosity to engage younger audiences, and external panels for the different walks (Drury & English Heritage., 2015). As a sub-contracted company, Bivouac worked with Leach as their main contact for discussing the interpretations and what they were needed to do. In their case study, they clearly state having worked closely with the English Heritage team, but do not mention how they may have worked with the intended visitor profiles.

2.2.2. DESIGNING FOR INTERPRETATION

2.2.2.1. DISSEMINATION OF KNOWLEDGE AND EXPERIENCE

The range of interpretation knowledge and experience amongst the design companies and curatorial teams at the heritage site organisations was extensive; therefore, any interpretative work undertaken would be bound to create memorable and informative experiences for visitors to each of the case study sites. Is this a correct assumption though? There are a few aspects to consider. For example, what are those experiences, are the people involved skilled at disseminating their knowledge and experiences, how do they know what would create a memorable or informative visitor experience, who are the visitors, i.e. are they all the same and

looking for the same experience? This section explores these aspects using the case study examples to understand, on the basis of available materials, how the designers form the interpretations to engage visitors with the stories of the heritage sites in a way that crafts memorable experiences.

From the research available on the design companies' websites and promotional material, the leading design companies involved have experienced heritage staff undertaking the projects. For example, Leach Colour's team includes an Interpretation Manager, a Heritage Commercial Coordinator, Heritage Design & Build Project Manager, and a Heritage Commercial Manager alongside their team of designers and project managers (Leach, 2013). ATS Heritage does not list their team's roles. Instead, they mention they have 'over 15 years' experience working with museums and heritage sites' (ATS Heritage, 2014a), creating 'great visitor experiences'. English Heritage has therefore chosen two very experienced design companies to work with for Bolsover Castle. At Lacock, the National Trust chose Ice House Design, a design team experienced in heritage interpretation is firmly put across through their website as being a team rather than individuals with specific roles. HRP has chosen experienced theatre-makers, set and exhibition designers, i.e. Coney, Joanna Scotcher and Chris Levine instead. Although not experienced in HSI design, they are experienced in creating experiences for audiences.

Examining how they start and the process followed, Leach's initial approach is to produce a brief that will provide 'great impact, exceptional quality and long-lasting results within their budget' (Challenger in Leach, 2015a:p.5). Based on typical design bids and processes, the proposed 'Interpretation Plan' would be a more substantiated tender bid document resulting from further discussion with the English Heritage team at Bolsover Castle, and Leach Colour's various heritage interpretation specialists. The work to be undertaken resulted in several disciplines and tasks:

Interpretation Design Crafts and Task - (Leach, 2015a:p.1)	
Building surveys	Space planning
Concept Design and Exhibition Planning	Graphic Design & Illustration (Bivouac Ltd)
3D Design	Historical Research and recreation of furniture
Upholstery	Digital Carving
Artefact mount design and manufacture	Interactive Design and manufacture
Prototyping and sampling	Offsite build
Packing and transport to site	Installation
Artefact handling and placement	Site management

Figure 53: Interpretation Design Crafts and Task - (Leach, 2015a:p.1)

Leach states that they work closely with the client to 'agree clear and measurable outcomes, including operational, learning, financial and emotional objectives.' They undertake audience testing and focus groups on testing ideas and providing user feedback, which would imply they follow an iterative process typical of a UCD process (Otto & Schell, 2016) (see Fig.54).
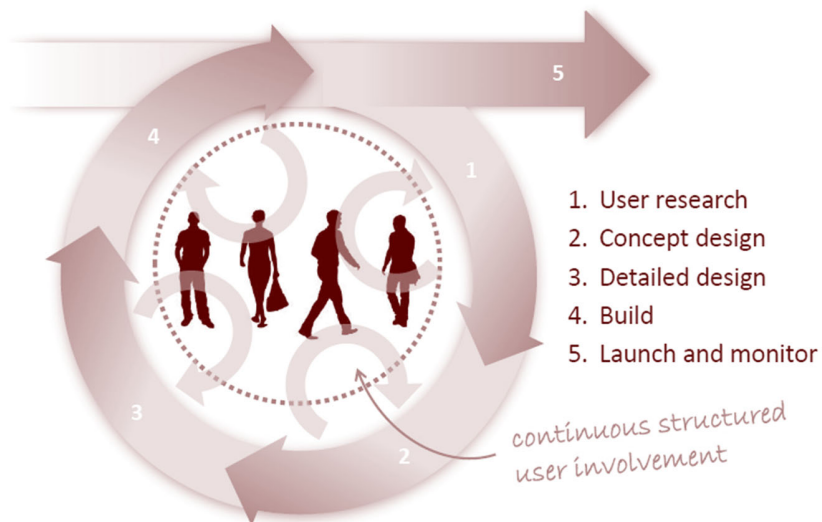

Figure 54: UCD Process Diagram (Otto & Schell, 2016, p.18)

The statement is supported by another comment '*and visitor journey allow us to fit story and space seamlessly together*.' (Leach, 2015a:p.5) It is not stated that the 'audience' or visitors are used at other times, for example, the initial design stage 'ideation', but it is good to see an iterative testing process used as in the Design Thinking diagram Fig.55 (Teo Yu Siang, 2016). Under the 'Collaborative Approach' heading, Leach state they act '*as visitor advocates'* (Leach, 2015a:p.5) in working with the client to achieve a successful project. The phrase assumes a role on behalf of the visitors, rather than involving visitors throughout the process. They also state they are aware the designs 'need to appeal to a wide range of visitor ages and abilities' (Leach, 2015a:p.6). To achieve this would involve user journeys (Caddick & Cable, 2011; Hanington & Martin, 2012; Beckmann, 2015), or personas, with visitor advocacy presumably resulting from other data gathering exercises such as focus groups. As this information has been drawn from their promotional material, it would be reasonable to assume this is Leach's general design approach and not specific to just the Bolsover Castle interpretation.
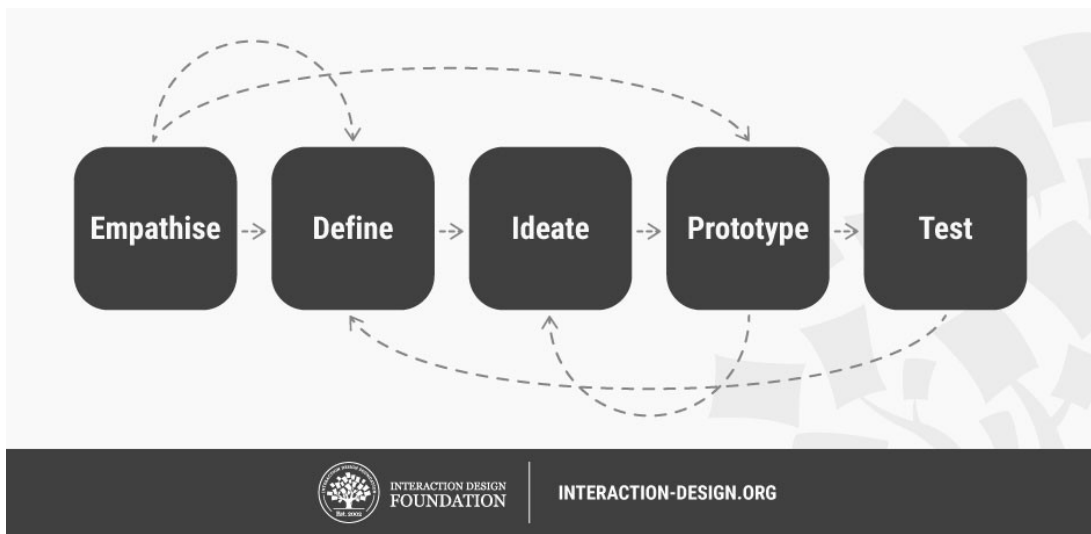
With regards to ATS Heritage, they promote their '*creative approach…. driven by the understanding of our client's audiences and awareness of the language, tone and style of interpretation that is fitting with each site*.' (ATS Heritage, 2014b:p.18) They also state they '*are passionate about enhancing …experience*' and '*always mindful of the end user and hope their experience will be improved*.' (ATS Heritage, 2015:pp.15–16) There are other similar statements but no detail of their design process throughout the promotional material, other than they allocate a Project Manager to ensure accurate and professional delivery of scripts and smooth liaison between the writer, the client and the production team for their multimedia tours and accompanying app. The site provides overviews of all the services they offer, some areas more comprehensive than others, with the general tone of a business to business site, rather than one that encourages visitors or users of their multimedia media apps to explore further examples of their work.

Part of their work undertaken for Bolsover Castle meant rebuilding the 17th century Little Terrace as a 3D model, flying over the present day terrace with a filming drone, the two were composited, providing footage for the 17th-century family and adult tours. The teams involved are described as innovative, skilled and experienced in all areas of creating apps and multimedia heritage tours. Whether they followed a typical UCD process is not evident in their material. Interaction and engagement with the two visitor profiles 'Culture Seekers and Experience Seekers' (ATS Heritage, 2014b:p.1) provided by English Heritage has perhaps only taken place via the creation of personas from research or previous experience building heritage applications. They have obviously worked closely with the English Heritage team, from both their comments and the feedback provided. It is

expected that it is this relationship that has provided knowledge of what was required from the multimedia tours, similar to my experience at Beaulieu. With ATS Heritage's creative storytelling and technology, the tours were designed to convey the heyday of William Cavendish's era to visitors using the app, and engage younger members with interactive games, animations and challenges using Jane, the daughter of William Cavendish, as the on-screen character. Screen characters are an engaging method of providing information via storytelling (Vayanou *et al.*, 2014), in this instance it has been used to see the visit of the Royal family through the eyes of a child, therefore providing information that may stir the imagination in younger visitors. It is not explained whether visitors were asked if the types of stories created inspired and engaged them in imagining the Royal visit through Jane's eyes.

Lacock's main attraction is the Fox Talbot Museum and the village, its history as a nunnery for approximately 300 years would appear to be of lesser importance in terms of visitors, yet was perhaps the most important for the community that once lived there. The stories of the Nuns at Lacock would help visitors understand community life in the related eras. Visitor feedback and observation by the curatorial teams highlighted community and life stories were important to them for understanding the sites' historical importance, hence the interpretation of Abbess Ela's monastery at Lacock Abbey.

Ice House Design followed a similar storytelling interpretation used by ATS Heritage, although rather than through the use of a multimedia application, it was told via the use of image panels, rooms set replicating a moment in time, audio and wall/glass graphics. The 'storyteller' is Matilda Talbot, the last owner of the Manor.[60] Matilda provides a brief overview of the history of the Abbey, small snippets of information, easy to 'take in' or remember and understand as an overview. The information displayed by Ice House Design's interpretation panels was probably sourced from a combination of liaising with the curatorial team and the existing printed information, i.e. the guidebook, it is not clear on Ice House Design's site. Nor is it clear whether they followed a user-centred design process, involving visitors throughout their ideation and development of ideas, or simply worked with the curatorial team. They promote their way of working with their clients by '*[taking] time to understand our clients' ethos, commercial aspirations and objectives – and grasp what needs to be done. Only then will we get the pencils*

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[60] The Nunnery was changed to a Manor House by a previous owner, Sir William Sharington, in 1540. The Talbot family took ownership via his niece on his death in 1566, when she married into the Talbot family. Matilda signed the Manor over to the National Trust in 1944. (Lacock Unlocked, 2012; Thornber, 2015)

out.' (Ice House Design, 2015b) Ice House Design has worked with the National Trust for several projects and has stated how the National Trust 'a*ren't content with you just having a rather pleasant day in pretty surroundings. They want you to think, smile, be stimulated, surprised – shocked even.*' (Ice House Design, 2015a) They also state '*Using subtlety, sympathy and an understanding of the historical context, good interpretation must invigorate, inform and inspire.*' (Ice House Design, 2013) The interpretation, therefore, appears to have been designed to do this on behalf of the visitors, rather than knowing what visitors would like to 'experience' at Lacock Abbey.

Designed by theatre and lighting designers, the House of Cards and the Enchanted Palace at Kensington Palace were very different styles of interpretation to previous exhibits. The designs were created to provide '*thought-provoking playfulness*' (Scotcher, 2013) through the use of visual elements forming narratives of the Princesses' lives and Queen Victoria's at the Palace. Chris Levine's expertise in light art was used to provide almost ghostly figures or 'echoes' (Historic Royal Palaces, 2011b) of the princesses. The ghostly figures were designed to capture the visitors' peripheral vision as they walked through the Palace; a form of shock perhaps, similar to the National Trust's desire to provoke smiles, stimulation and shock. Joanna Scotcher and Coney designed the House of Cards to impart snippets of gossip of the lives of Queen Victoria, Princess Diana and other royal members, '*through the eyes of the comparatively lesser-known late Stuart and early Hanover monarchs.*' (Rank, 2013) The designs are more 'whimsical' than typical of
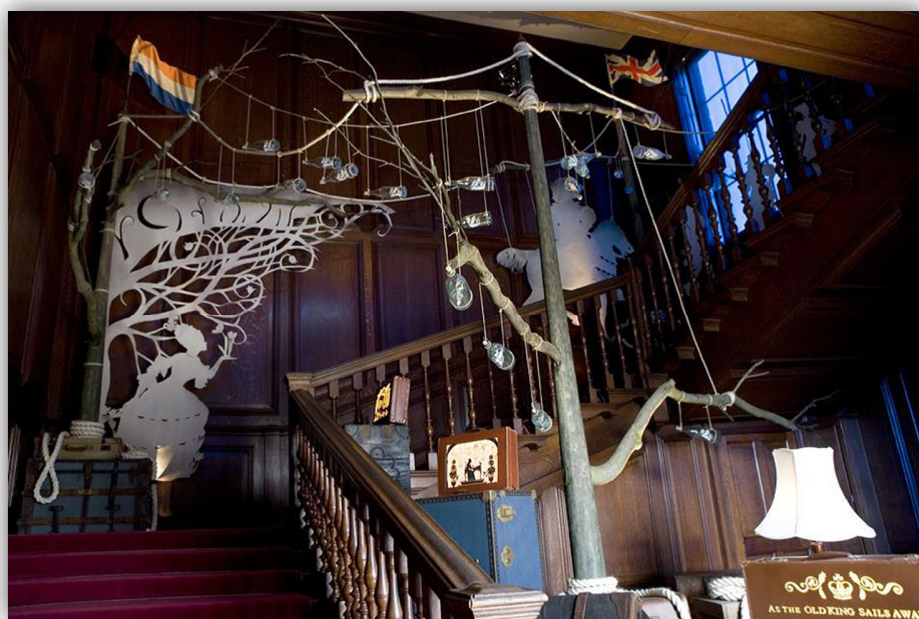

Figure 56: The Enchanted Palace – Kensington Palace (Scotcher, 2013)

traditional interpretation panels and placards, with visitors following a trail of imagery, hanging, floating and interactive elements although very little by way of textual information (see Fig.56).

How the ideas and interpretative concepts were formed was perhaps through discussion with visitors, or, typically, just the HRP team. The contracted artists and craftspeople may have involved visitors in the formation of ideas, although the desired 'surprise' element of their interpretation exhibits would perhaps have been negated. There was certainly a collaborative design process employed although this does appear to have been mostly between HRP Kensington Palace staff (including volunteer guides) and the artists and designers (Gaffikin, 2012). By involving the volunteer guides in the ideas and creation, the guides presumably acted as visitor advocates, although they may have viewed their involvement from their position of engagement with, and knowledge of, the Palace, rather than the visitors. It would be interesting to discover how the 'team' worked in coming up with the variety of imaginative concepts, and if their typical visitors and those they were aiming to reach, thought the 'experience' was positive and engaging. In the next section, how their visitors reacted to the very different interpretations will be explored and whether they considered it a success.

2.2.2.2. ASSUMPTIONS, INFLUENCES AND CONSTRAINTS

From my work at Beaulieu Abbey, I recognised that a thorough understanding of what was required, or expected by a sponsoring organization or stakeholders, was extremely important. Communication was pivotal for ensuring the final interpretation matched the stakeholders,' and curator's, expectations. For those involved in the design of the interpretation, there needed to be a clear strategy to achieve the result. Therefore a process, and management of that process, were also required. Influences and constraints were mostly time, budget, technology and access to specialists. Regular meetings with the Beaulieu team provided a detailed vision for what was required leaving little room for assumption and therefore possible misunderstandings.

The case studies highlighted this is not always the case. For example, HRP invited Coney to create a '*radical new interpretation of the stories of Kensington Palace that would give the audience new ways to connect to the people and stories that populated the palace at the height of its glamour and power*.' (Coney, 2012:p.2) English Heritage requested companies to tender for '*a new*

presentation and interpretation of the castle interior and gardens' (Banks, 2013) at Bolsover Castle, stating in the service contract:

> *'[Bolsover Castle] was designed and used by a family of exceptionally important and interesting personalities and there is a very rich story to tell, with interleaved layers of historical significance and human interest. These stories can be challenging to our visitors and so a representation project is highly desirable as a way to bring this once vibrant place to life.'*(English Heritage, 2013)

Both 'briefs' were open to a wide range of interpretations. HRP's perhaps the broadest, there were no obvious constraints mentioned, such as 'academic rigour' and 'intervention on the fabric of the building' to be 'technically reversible' in English Heritage's Bolsover Castle's service contract. Therefore, the designers were able to create almost anything as long as, in Bolsover's case, it was about William Cavendish, his family and life in the 17th century, and in Kensington Palace, it engaged with stories of the people who were connected with the property in its heyday. Without a more prescriptive and detailed brief, it must have been difficult for the designers to know what to produce or craft as an interpretation which would tick the heritage organisation's mental vision criteria box. There appears to be room for assumptions. The rationales provided by the different designers for their work with the heritage organisations demonstrated they were not fazed by the openness; in fact, it allowed them to experiment with ideas, different materials and innovative methods of storytelling:

> *'It was a real opportunity to use new technology and traditional techniques to achieve results that are beautifully crafted but with all the cost, time and longevity advantages that high tech whizz-bangery can offer.'* (Pettite, 2014)

They would not necessarily have known whether their experimental ideas would be acceptable. They would still have needed to create a design brief specifying their intentions and planned outcomes, with time and materials specified and costed to ensure their plans were achievable. The lead design companies would have liaised closely with the heritage team to ensure acceptance of what they were doing which is evidenced by some of the reviews, for example:

> *'Working closely with English Heritage's team and with Leach, Bivouac designed a completely new exhibition in the Riding House Range.'* (Pettite, 2016)

The National Trust's interpretation for Lacock Abbey was twofold: firstly, to open up the cellar to expose the vaulting which would allow visitors to understand the building as it once was, secondly

to provide information panels, interactive maps and audio for the cloisters to help explain how the nuns lived at the nunnery with more personal information about Abbess Ela, the owner:

> *Step into the atmospheric medieval cloisters and walk back in time. Imagine how the nuns would have spent their days here 800 years ago and pick up one of our new information maps to learn about Lacock Abbey's monastic past.'* (The National Trust, 2015)

The latter interpretation was created by Ice House Design, a local (Bath) design company, who have worked with the National Trust for other interpretations properties such as Tyntesfield:

> '*The Ice House Team have helped Tyntesfield create an extremely effective identity and brand out of the existing NT brand guidance. Their creativity and understanding of the brief enabled us to look really differently to any other NT [National Trust] site whilst ensuring we still feel part of the wider National Trust. The way of working and results now mean that Tyntesfield is viewed as a brand exemplar and an example of how to do things right within an organisation. Throughout our work together Ice House Design have also been extremely capable and effective at helping us get to the right outcomes, often challenging us in the process to rethink how we do things. We would always use them for future projects.*' Anna Russell, General Manager, Tyntesfield Estate. (Ice House Design, 2012)

The quote provides an insight to how well they understood the brief and worked together to achieve the 'right outcomes'. A difference with the National Trust Lacock Abbey interpretation compared to the two other interpretations (Bolsover Castle and Kensington Palace) was that there was a clear and detailed brief provided, with the design company a known entity. It was also a smaller project, and one that would be a long-term installation, unlike The Enchanted Palace interpretation projects for Kensington Palace which were only for a period of 2-3 years whilst restoration work was taking place. (Historic Royal Palaces, 2011b)

Does knowing who you are working with and having experience of working with them help in being able to communicate ideas and vision? This definitely seemed to work for Lacock Abbey and Ice House Design, but perhaps by working with new designers brought new ideas mentioned by Pettite (2014), new skills and ways of thinking. This seemed to be the case with Kensington Palace's The Enchanted Palace interpretation and Bolsover Castle's interpretation. The design companies crafted innovative methods of storytelling in many forms including light installations, curiosity cabinets and performance.

Working with heritage properties brings constraints in just the building alone. Many heritage buildings are listed buildings and as such, adherence to restrictions on fixtures and fittings must be complied with. Solid, thick walls may defy visitors being able to receive mobile data or WiFi; electrical cables cannot be chased into walls, and instead may be mounted or placed in certain areas only and therefore limit the use of power. There are constraints in time, technology and budget, the three often intertwined, each having an impact on the other. Physical space for moving around the exhibits safely, complying with accessibility, and ensuring ease of flow for visitors are also constraints to consider in the design of an interpretation or exhibit. Set designers, exhibition and spatial designers would be aware of possible constraints, not necessarily graphic designers, especially those new to working with spaces such as heritage sites. Therefore, designers who have experience in working with heritage organisations or exhibition spaces may be a preferred option, hence Ice House Design, ATS Heritage, Leach Colour, Coney, WildWorks, Joanna Scotcher and Bivouac whose promotional material stated various years of experience with heritage interpretation.

Designers have previously been known to dictate or disregard others' ideas and provide what they think best. In some ways similar to the view of the traditional curator, i.e. they choose what is on display and how it is interpreted (Poria, Biran & Reichel, 2009:p.94; Cairns, 2013:p.9). This may still

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happen, but from research regarding design practices, the push to be more user-centred or user-focused is shown through a new raft of design roles. For example, User Experience (UX) Designer, User Interface (UI) Designer and User Centred (UC) Designer (explained in more detail in section 2.3.2). The influences placed on a project should, therefore, be based on the expectations of visitors, what they would like to engage with or see. The designer's task is to translate this in conjunction with the curatorial team's brief and design the interpretation to fulfil and hopefully exceed those expectations, creating experiences visitors will remember because it may evoke a memory or a feeling they did not consciously expect to experience.

The designer's (and curator's) own biases should not be the primary influence; it should be the site's stories and the visitors' reasons for visiting the site. The National Trust's case study shows how this has worked from the Trust's involvement of the community in creating the Statement of Significance for each of their properties, and then visitors' feedback wanting to learn more about Lacock Abbey when it was run as a nunnery. This is not so evident at Bolsover Castle or Kensington Palace, where assumptions may have been made on behalf of the visitors in the design and interpretation of the brief.

2.2.3. USING AND ENGAGING WITH INTERPRETATION

2.2.3.1. DISSEMINATION OF KNOWLEDGE AND EXPERIENCE

Understanding why people visit heritage sites helps to provide a knowledge base for curators and designers to refer to when initiating ideas for disseminating information about the site visited. Understanding why people visit different heritage sites, i.e. why one as opposed to another, would enhance this knowledge base allowing perhaps a site categorisation to be formed. Each site has specific history and stories to tell, but how this is interpreted for visitors is often very different across a range of heritage properties.

Generally, the Front of House staff and volunteer guides are often more knowledgeable than the curatorial team and designers regarding what visitors may engage with. This is obviously because of their visitor facing role and thereby talking with visitors on a daily basis. By being 'around' visitors as part of their job, FoH staff and volunteer guides build an understanding of the sites' type of visitor demographic from seeing and observing the types of visitors, the groups, individuals and families, the places visited frequently, and hear the visitors own stories of why they are there, their likes and dislikes. How their understanding and visitor knowledge helps to inform interpretation would be via meetings with stakeholders, managers and curatorial team, a design team, education team as available. They are invaluable in helping to understand the type of interpretation that would 'fit' with their heritage sites' visitors.

This section seeks to understand the types of visitors who enjoyed visiting the case study heritage sites. In doing so, it was essential to have an indication of how many visitors had visited when the interpretations were in place, and to understand why visitors had chosen to visit the sites selected. Heritage sites are constantly seeking to increase visitor numbers; new or additional interpretations form a significant part of their strategy, or goal, to achieve this. Therefore, knowing whether there was an increase of visitors to the heritage site at the time of the chosen interpretations, would provide evidence in whether the interpretation had succeeded in achieving this goal.

In 2011-12, there were 153,039 visitors to Lacock Abbey/Fox Talbot Museum, 209,485 visitors to Kensington Palace and 69,248 visitors to Bolsover Castle, an approximate total of 432,000 visitors (see Figure 58 below). According to Visit England's report for 2011, historic properties saw an increase of 14% by overseas visitors and 22% local/day trip visitors (VisitEngland, 2012) from 2010's figures. The increase may be due in part to the new interpretations, i.e. resulting from a

launch and public notices of the new exhibitions, multimedia tours, and improvements. Alternatively, the increase may have been due to a national trend in the rise of visitor numbers. Since 2008, heritage property visits have seen an increase in visitor numbers of approximately 20% (VisitEngland, 2012:p.13). There is, therefore, a general rise in people choosing to visit historic properties. Whether the increase in numbers was also due to improvements in marketing and promoting heritage at the case study sites can be determined from visitor feedback and organisational statistics, although not included as part of this thesis.

Case Study Visitor Numbers

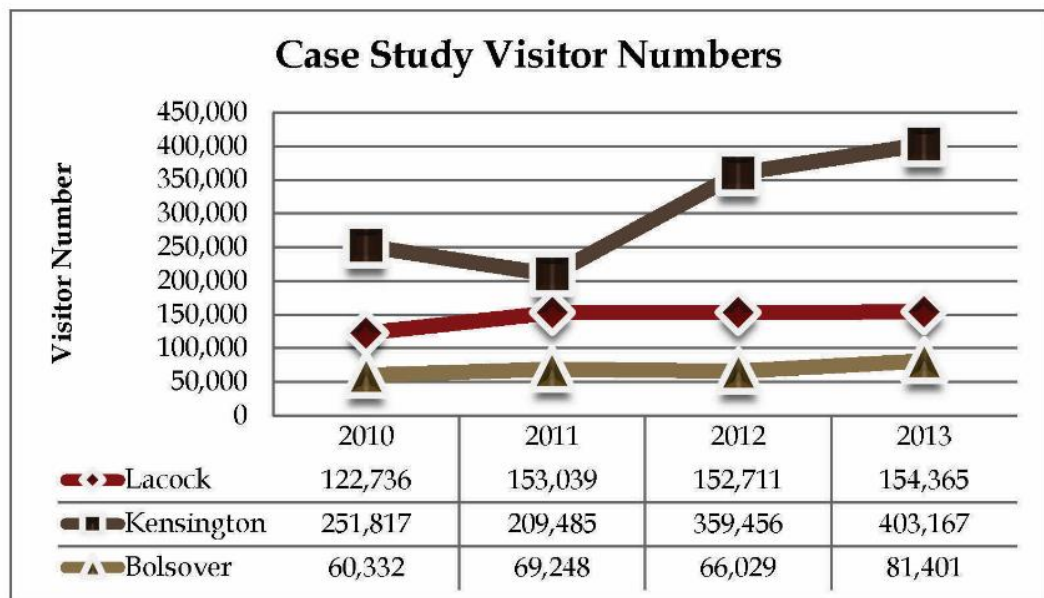|	2010	2011	2012	2013
Lacock	122,736	153,039	152,711	154,365
Kensington	251,817	209,485	359,456	403,167
Bolsover	60,332	69,248	66,029	81,401

Figure 58: Visitor Numbers between 2010 and 2012 at the case study sites: Lacock, Kensington Palace and Bolsover Castle (ALVA, 2010, 2011, 2012; National Trust, 2012; Jenkins, 2013; Mills, 2010; Derbyshire County Council, 2014; National Trust, 2010)

- Lacock Abbey's 2013 interpretation therefore saw an increase 1.08% from 152,711 visitors in 2012 to 154,365 in 2013

- Kensington Palace's 2012 interpretations therefore saw an increase of 71.6% from 209,485 visitors in 2011 to 359,456 in 2012

- Bolsover Castle's 2013 interpretation therefore saw an increase of 23.28% from 66,029 visitors in 2012 to 81,401 in 2013

The subsequent question is why they have chosen to visit. Beck and Cable (2011) recognise visits to cultural sites form part of visitors' leisure time which can have different meanings for different people. Leisure may mean for some to simply relax and enjoy aspects they might come across, or engage with. Leisure time for others may mean expanding their knowledge. Beck and Cable also speak about the 'Greek ideal of leisure (or "schole")' which means to seek truth, setting side goals

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or agendas for the sake of experiencing, or as Beck and Cable explain 'to expand the range of one's physical, mental, or spiritual capacities' (Beck & Cable, 2011:p.146).

To discover the types of visitors such as those referred to by English Heritage as Experience Seekers (ATS Heritage, 2014b) and reasons for visits has been through researching TripAdvisor Visitor Reviews[61] (TripAdvisor, 2010a, 2012, 2010b) for each of the heritage sites. The Trip Advisor reviews selected were over a six to eighteen-month period during the specific interpretations detailed in the case studies, and sampling 30 reviews from each site. The reviews provide a scale (Fig.59 below) indicating how they have rated their visit, age range, gender and tags, i.e. 'history buff' and 'peace and quiet seeker,' more importantly, a descriptive review often detailing what they liked most or least about their visit.

Figure 59: Trip Advisor Ranking Indicator (Puorto, 2016)

The Lacock Abbey reviews on Trip Advisor start in October 2012, Bolsover Castle reviews start from May 2011, whereas Kensington Palace reviews started in 2004. The decision was therefore made to select reviews between six and eighteen months following the opening of each new interpretation: Lacock Abbey October 2012-December 2013, Bolsover Castle April-September 2014 and Kensington Palace April 2010-August 2011. A sample of 30 reviews per heritage site was chosen based on the amount of information provided by the reviewer, i.e. comments, age, sex, where they were from and the description tag/label indicator provided by Trip Advisor. Please see Figures 60 and 61 for the different areas of information.

The search results from the Trip Advisor samples taken provided a good overview for understanding the type of visitors to the three heritage sites. For instance, 70% of the sample for Kensington Palace were female, 57% female reviewers for Bolsover Castle, and an equal amount of male and female visitors reviewing Lacock Abbey. The majority of visitors to each heritage site were in the 50-64 age range.

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[61] In using Trip Advisor for an overview of the types of visitors visiting the three heritage sites, I have made the assumption that people reviewing on Trip Advisor are actual visitors. Each of the reviews selected stated they had visited the heritage site, provided opinions of their experiences, and how they rated their 'Trip' interests through the use of 'tags'. Nonetheless, I was fully aware that this is a limited assumption, based on the data that I was able to access.
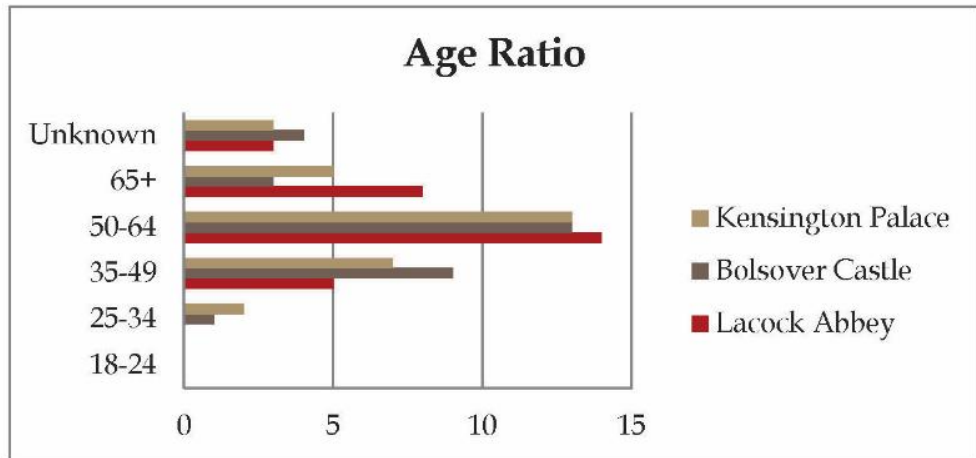
Figure 60: Age ratio of Trip Advisor Reviewers for the Case Study heritage properties (Wilson, 2017)
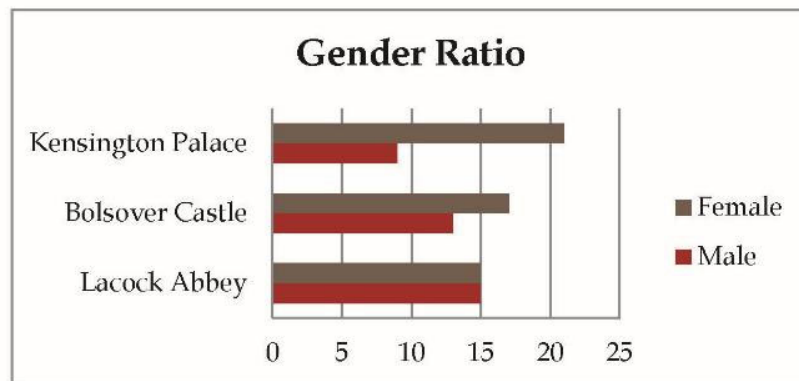
Figure 61: A: Gender ratio of Trip Advisor Reviewers for the Case Study heritage properties (Wilson, 2017)

Figure 62 below displays several of the indicators (known as 'tags') provided by Trip Advisor for reviewers to describe the type of traveller/personal interest.[62] The tags highlight 'types' of people visiting the different heritage sites. It is not a surprise to see 'History Buff' as the most popular type for Bolsover Castle and Lacock Abbey. 'Like a Local' is the next highest, again for Bolsover Castle and Lacock Abbey which have shown they have higher numbers of UK visitors. Bolsover Castle appears to attract more local visitors than Kensington Palace, and often family groups, perhaps nature lovers seeking peace and quiet, and activities for children.

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[62] There are 19 tags to choose from to describe the type of traveller you are when you join Trip Advisor; the tags not mentioned above due to their lack of relevance for the case studies are: Vegetarian, Beach Goer, Nightlife Seeker, Foodie, Backpacker, Shopping Fanatic, Trendsetter and Eco-Tourist.

Figure 62: Classification of Visitor Samples using the Trip Advisor 'Tags' for each of the case study heritage sites (Wilson, 2017)

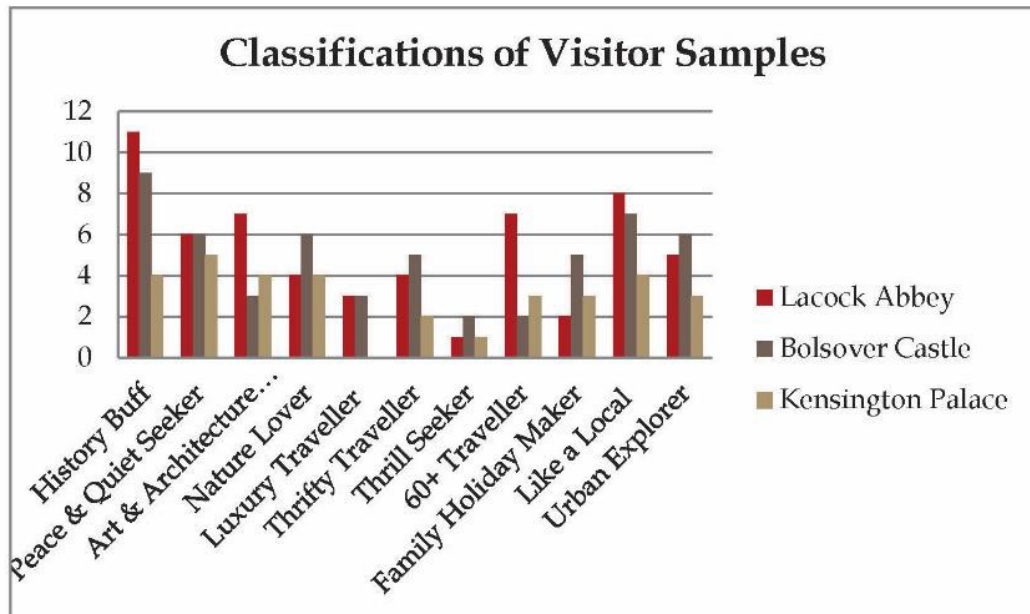Having an insight to the Trip Advisor 'types' of visitors interested in the three case study heritage sites, helped to understand the type of information they would be interested in, i.e.:

- Lacock Abbey visitors would be most interested in history, art and architecture and usually are over 60 years old, and spend time exploring local heritage sites.
- Bolsover Castle visitors would also be most interested in history, additionally appreciating nature, peace and quiet and spaces for children/grandchildren to play during a day out locally.
- Kensington Palace's mix of visitors would appear to be relatively evenly spread across all tags, aged mostly 50-64, with family groups, perhaps looking for peace and quiet as a priority for part of their scheduled day out.

English Heritage had specified for their Bolsover Castle interpretation, a focus on 'Experience Seekers' and 'Culture Seekers' to widen their visitor base. With regards to the Trip Advisor tags, the latter could consist of History Buffs, Like a Local and Art/Architecture Lovers, with the former more difficult to surmise, as it would depend on the type of experience sought i.e. they may be seeking a 'thrilling' experience (Thrill Seeker tag) or a shared family experience (Family Holiday Maker) or both. From the Trip Advisor reviews and sample, the interpretation should therefore be

seen as having achieved their aim; their visitor base was primarily Culture Seekers, and depending on how 'Experience' is interpreted, there were also elements of several tags that could equate to providing an 'experience' and therefore fulfilling the 'Experience Seekers' focus. The family day out was certainly a key message coming from the reviews, with staged events making the 'day' more of an experience. English Heritage's overall vision for the interpretation at their sites involves five core values: Authenticity, Quality, Imagination, Responsibility and Fun. Under Fun, they state:

> *'We want people to enjoy their time with us. This doesn't mean we are frivolous or superficial. We want to provide experiences that elicit emotion as well as stimulate the mind. We want to entertain as well as inspire.'* (English Heritage, 2015:p.4)

English Heritage also has a strategy for minimal signage at their sites. Although this is meant to enhance the naturalness of the site, a small percentage of the reviews commented on the lack of signage negatively; they felt more signage would have helped them to navigate around the site and provide context for certain aspects of the audio and multimedia tours.

The National Trust has a similar strategy with regards to minimal signage with an additional emphasis of ensuring a 'personal approach' (Taylor, 2006b:p.107) via volunteer guides who are available with stories of the property to engage the visitors, as in the Kensington Palace Enchanted Palace interpretation. National Trust volunteer guides are trained in storytelling and the history of the specific property to be able to recount the lives of the people who lived there. Minimal signage is also enhanced with ambient sounds, helping to build an image in the minds of visitors of Lacock Abbey's social history.

A main focus of *t*he National Trust's strategy is to 'resonate with people's lives' via a 'two-way [lifestyle themed] communication process' through their volunteer guides' stories and room settings (Taylor, 2006b:p.102). The Trust also provides different levels of interpretation to suit different audiences and a range of ages which can be seen from the comments made by one of the visitors. The feedback provided by the Trip Advisor reviews for Lacock Abbey consistently rated highly at 5, with only a couple rated at 4. From the reviews, the overriding opinion was a good appreciation of the quality of interpretation and mix of things to do which would support the National Trust's aim to offer '*a range of experiences so that every visitor leaves feeling that they have enjoyed themselves and enriched their lives either consciously or sub-consciously, unlocking the doors to inspiration and knowledge.*' (Taylor, 2006b:p.102)

It is apparent from the sample of Trip Advisor reviews that experiences are an important reason for visit, the type of experience depends on the type of property and what is being offered as part of the visit. The offer/multiple offers are what has attracted the different types of visitors and with whom they visited. Quite often, the visits were for a day out, or to form part of a day out; the intention does not appear to be to learn but to enjoy a different space with partners, friends or family. The activities and volunteer guides' stories appear to be remembered more as enjoyable experiences, with learning a possible sub-conscious element forming part of the experience.

2.2.3.2. USING AND ENGAGING WITH INTERPRETATION: ASSUMPTIONS, INFLUENCES, AND CONSTRAINTS

There may be multiple reasons involved in the visitors' decision to go to a particular heritage site over another, and many considerations in making that decision. Reasons could range from external influences such as a promotional flyer for an event such as a re-enactment, demonstration of a particular craft or art installation, or internal factors, i.e. wanting to learn about a particular historical event for a school project or personal, cultural interest.

One of the outcomes of the previous section highlights that visitors have an expectation that their visit, however arrived at, will form an experience. This may be either via an activity, engagement with volunteer guides' stories, or imagined lifestyles brought about by room settings of a particular time slice of the site's history as a tour progresses, or simply just a happy, relaxed family day out. This section explores whether the different interpretations visited match the assumptions in the selected case studies. If they did not, how might this be changed to alleviate disappointment?

Tilden firmly believes that the '*chief aim of interpretation is not instruction but provocation'* and forms one of his six guiding principles of heritage interpretation (Tilden, 1957:p.35). Visitors to Kensington Palace's 'Enchanted Palace' exhibition were provoked to a reaction, but not necessarily in the same way as others, or, perhaps as intended by Tilden's principle. From the reviews, it would appear traditional visitors made assumptions for their visit that they would see elements of the Palace and its associations with Princess Diana (Humphreys, 2012:p.6). In section 2.2.1 Curating Interpretation at Heritage Sites, it was mentioned that Historic Royal Palaces' aim is to '*help people explore stories, … and engage people's senses*' (Mackay, 2014:p.4), which was obviously part of the reason for the Enchanted Palace interpretation. It was clear HRP successfully

involved team members across HRP's staff, the front of house staff and volunteers but it was not clear whether a range of existing/regular visitors were also part of the planning process for the Enchanted Palace interpretation. Maybe if they had involved their existing, more traditional visitors in their discussions about expanding visitor reach to include more 'families and young, urban Londoners' (Woollard, 2011 cited in Humphreys, 2012:p.6) there would have been a different form of temporary interpretation.

HRP's Enchanted Palace and House of Cards interpretations attempted to provide a magical theatrical world in which visitors learnt about the lives of the princesses associated with Kensington Palace, and for 25% of the Trip Advisor sample, this was appreciated and enjoyed. The intention of providing the Enchanted Palace interpretation was to increase the range of visitors.

Figure 63: Back of Flyer for the 2012 Enchanted Palace Exhibition (blog.travelmarx.com, 2012)

Had HRP planned a temporary exhibition which contained elements of how the newly restored Palace would look, with artefacts from the usual tour(s) included, weaving a story about the changes to the Palace, perhaps from the perspective of the Princesses, this may have been a more successful interpretation for their 'traditional' visitors. It may also have drawn in new visitors to see how the Palace has changed over the years with the different events that took place and built

an interest to visit again once the renovations were complete. School groups, architectural students, young urban Londoners, 'History Buffs' and international visitors may have found this type of interpretation more in keeping with their interests, the reason for the visit and therefore expectations. The educational groups showed an increase of 40% in the number of visits taking part in workshops (Wedgbury, 2011 cited in Humphreys, 2012). Kensington Palace, through the Enchanted Palace exhibition, was able to extend from Key Stage 1 and 2 educational workshops to a wider range of subjects including GCSE Art. The Palace team also increased the opportunities for young people to visit by staging a series of events of an evening, which '*proved an effective strategy'* (Humphreys, 2012:p.8).

The Enchanted Palace interpretation, although successful for working across the different teams at HRP, and full involvement of their front of house staff, was not as successful in their initial aim to attract families and young urban Londoners (Gaffikin, 2012:p.5; Humphreys, 2012:p.35). The promotional material should have explained the type of interpretation visitors would see, the visitors would, therefore, have been aware of what they would experience (see Fig.60 above).

There have been several discussions about visitors' motivations/reasons for visits to museums or heritage sites with different perspectives. Falk and Dierking (2000) suggest visitors have an agenda combining '*motivations, interests and prior museum experiences'* (Falk & Dierking, 2000:p.76). By comparison, Tilden (1957) writes that *'the visitor's chief interest is in whatever touches his personality, his experiences, and his ideals'* (Tilden, 1957:p.36). He believes, for whatever reason the visitors are there, it is for the museum or heritage site to determine what will interest them while they are there. Exactly what brought them there, they may not know themselves, but it is what they are presented with that will capture their interest or spark enthusiasm to look further, especially if it relates to themselves, perhaps a personal experience or memory. There is a good example provided by Tilden in which he cites a message to park educational officers delivered by Ansel F. Hall (1928):

> *'…Remember always that visitors come to see the Park itself and its superb natural phenomena, and that the museum, lectures, and guided trips afield are means of helping the visitor to understand and enjoy these phenomena more thoroughly. … A few believe it is our duty to tell as many facts as possible, and therefore take pains to identify almost every tree, flower and bird encountered. Others have taken as their motto "to be nature minded is more important than to be nature wise," and feel that it is more important that the visitor carry away with him an intense enjoyment of what he has seen, even though he has not accumulated many facts.'* (Hall (1928) cited in Tilden, 1957:p.60)

To be able to recognise and understand the type of interpretation that will engage visitors and provide the experiences they seek, either consciously or sub-consciously, the interpretation planning/design team need to understand and recognise the different visitors that have chosen their heritage site to visit. There is consensus that this happens (Black, 2011; Ham, 2013; Ballantyne & Uzzell, 2011), but to what degree this is being done, i.e. how much information is based on direct association with the visitors, and how much is based on assumptions, is unclear.

Elements of a UCD process for the case studies' interpretation designs are indicated through the use of visitor journeys, focus groups and audience testing (Leach Colour for EH's Bolsover Castle), but the involvement of visitors throughout the process does not seem to have been employed. Based on the information about visitors' motivations or reasons for the visit, it may be an assumption that visitors would like to be involved in the idea generation and concept planning process. There may have been regular local visitors that perhaps would have liked to have been more involved with their local heritage site and enjoyed being part of the process, but not notified of the opportunity to do so. As with the tender for designers, perhaps there could have been a 'tender', i.e. a call, for local visitors to be involved and therefore enable a richer understanding of visitors in the interpretation design process.

If not visitors per se, then perhaps visitor advocates at heritage sites or organisations might be useful in the interpretation design process, such as HRP's volunteer guides (interpreters) or front of house staff acting as advocates. There would be a risk that assumptions could still be made, or perhaps certain visitor types' needs and motivations overlooked in preference for others if not represented by the advocates chosen. Experienced volunteer guides and front of house staff are constantly in contact with their visitors, and therefore build a good reference of areas liked/disliked, types of visitors, who they bring with them and why. Interaction with guides, their mix of academic and 'gossipy' stories, can often have a transformative effect on a visitor's visit and their overall experience (Howard, 2003:p.256).

English Heritage's Bolsover Castle team understands the importance of volunteers bringing 'buildings to life' in their engagement with visitors and enhancing their experience of their visit. In 2014, The Chesterfield Post published a call for 'Volunteers Needed For Exciting New Project at Bolsover Castle' (The Chesterfield Post., 2014). The article explained that the Castle was looking for:

'Volunteer 'Explainers' [who] will play a central role in helping people from all over the world to explore this fabulous heritage site and to enhance their experience. Acting as the first point of contact for visitors, they will be the welcoming and friendly face of the castle, equipped with interesting facts, stories and information on the Little Castle and its contents.' (The Chesterfield Post., 2014: p.1)

The Property Manager, Keith Holland, extended this by saying *'they will help bring the Castle to life by providing information and encouraging visitors to explore the rooms and collections'* and saw it as *'an exciting opportunity to be involved in the re-presentation of our beautiful and intriguing Little Castle'* (The Chesterfield Post., 2014:p.2)*.* What would also be good to see are those same volunteers involved in the interpretation concept and planning discussions.

The number of volunteers[63] has also increased within the National Trust, with the Trust continually seeking to improve their visitors' enjoyment of their properties. The Trust also actively aims to increase the involvement and enjoyment of their volunteers, i.e. creating a dedicated 'MyVolunteering' intranet section for the volunteers to engage with others about their work and role (Jenkins, 2013:p.12).

HRP's front of house staff at Kensington Palace managed to persuade the interpretation team from their initial concept of fairy tales to 'tales' of the actual princesses (Humphreys, 2012:p.5). The Front of house staff believed their visitors would appreciate real stories of the Palace rather than fictitious characters, which was also supported by the experienced Wildworks' interpretation design team (Falmouth University, 2011). The theme of 'fairy tale' did not change; instead, it was adapted to suit, resulting in the Enchanted Palace. It was also FoH staff (Visitor Services Manager, Karen Bolger) on listening to visitors feedback who recommended the opening of the cellar at Lacock Abbey, for visitors to see the context of the Abbey alongside the house and cloisters (National Trust, 2014).

With the precious knowledge volunteer guides, guides and heritage site interpreters have about specific sites, and their visitors, it is possible as visitor advocates, they would be suitable influencers throughout the interpretation design process.

An alternative to physically involving visitors within the design and planning process would perhaps be to implement the feedback provided via social media and/or review channels. As

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[63] 70,494 in 2012-13 from 67,000 in 2011-12 (Jenkins, 2013:p.12; National Trust, 2012:p.4)

shown with Trip Advisor, visitors like to provide feedback about their visit for other visitors to review before a visit in their planning of a day out. 'E-Word of Mouth' (Leung *et al.*, 2013; Tham, Croy & Mair, 2013) has become an increasingly accepted method of review before purchase, travel booking, restaurant booking or trip out. Trip Advisor, VisitBritain and mainstream social media channels such as Facebook, Twitter, YouTube and Instagram also offer people a means of sharing their information, photos and experiences of their day out. There is, however, evidence that this might not be considered trustworthy (Lee, Law & Murphy, 2011; Ayeh, Au & Law, 2013; Baka, 2016), and this should be considered when planning to make use of this content. For heritage sites such as the National Trust, English Heritage or Historic Royal Palaces, this nonetheless provides a valuable resource for visit reviews, suggestions and individual likes and dislikes of the heritage site. If not already being done, it would seem logical to implement observation and review of the comments and use within the discussions for new interpretation design and throughout the planning.

SUMMARY

Section 2.2.1. reviewed how the case study organisations determine interpretations at their properties, who was involved in this process and what that process may be. Reviewing the case study interpretations from a curatorial perspective, there were several questions raised concerning dissemination of knowledge and understanding, not just about the property to their visitors but also amongst those involved. The three case studies organisations' curatorial teams have shown they review the property in terms of its history, events considered important by the local community and visitor feedback to gauge an idea of what may encourage a deeper engagement and understanding of the property's history and its inhabitants. With HRP Kensington Palace's interpretation, there is evidence of involving front of house staff, volunteer guides and different departments such as education, interpretation and surveyors in a collaborative design process, yet no evidence for the three organisations of visitor involvement in that process, or measurement of visitors' engagement found in their published documents. Therefore, it would seem the heritage organisations have a general concern/interest in how the subsequent specific interpretations are received by visitors. They hope visitors will be inspired, understand and enjoy the experience, and through feedback will discover if this was the case. Their stance would appear to be a kind of 'we have planned this for you, we think it is great, it ties in with everything we set out to do and therefore we think it is successful, we think you might quite like it, and hope you

think it is successful too' attitude. Lack of evidence of visitors being involved in the process would suggest there is a general assumption on the organisations' part, albeit based on the team's previous interpretation experience, research and post visit feedback comments.

It is feasible that the heritage organisations' overall concern regarding 'success' for the interpretations was in achieving the planned interpretation concept in terms of time and budget, initial additional footfall and increased membership. Furthermore, 'success' appears to be how well the design companies interpreted and fulfilled their commission rather than a deeper understanding and engagement of the property by their visitors. This is not what the design companies say in their promotional material, but without fully involving visitors in their process, how can saying visitors are at the centre of what they do, really be the case? Reading about the care and enthusiasm curators and their teams have for the different interpretations, and an almost assured stance in each interpretation providing what visitors would like to see and experience, it may be easy to see why they believe they have the visitor at the heart of everything they do. With focused improvements to be 'inclusive and visitor centred' the industry has changed considerably from previous approaches to curation.

The Curation section set out to understand the interpretation process through who is involved, (skills and experience), what has been the process, and why (changes in legislation, stakeholders, funding, footfall, management/curators and visitors' feedback). Previous research (Kotler & Kotler, 2000a; Coffee, 2008; Ray, 2009; Soren, 2009; Trant, 2009; Janes, 2010b; Thomas, 2010; Easton, 2011; Rounds, 2012; Davis, Horn & Sherin, 2013; Louw & Crowley, 2013; Owens, 2013; Proctor, 2013) has shown that although curation at heritage sites has improved considerably in the last ten years, there are still areas that need further reflection within the area of interpretation planning, particularly considering the various capacities involved. The case studies examined in this chapter highlighted the importance of completing interpretation projects by all involved i.e. on time and in budget. They also highlighted the importance of a general overview of a visitor's day out and therefore experience at the heritage site. What is noticeable is a lack of visitors' involvement in the interpretation planning process; the planning team may consider them but not actually involve them. There is also a lack of measurement in specific areas such as the interpretation, designed to engage and communicate stories about the site. Without the ability to understand how well the stories are communicated and/or engaged with, it would be difficult to improve. The literature review (section 2.3) takes these points further to be able to understand how they might be improved or are being improved.

Section 2.1.2 has presented an analysis of how the case studies' interpretation designers have worked with the heritage organisations to create interpretations to engage visitors with the stories of distinct 'characters' and elements of their life at the heritage sites. When making decisions on what may be required, assumptions can occur based on designer's past experiences, knowledge and practice. Therefore, this section explored reasonable assumptions such as what the heritage organisation's (client's) expectations for the final interpretation design may be, and designers' assumptions of what their intended audience may wish to experience from their visit.

The main reason for awarding the contracts to the chosen designers was for their experience in designing HSI, their experience in crafting theatrical exhibitions or having worked with them previously. The tender process or call for interpretation design companies seemed to vary between the organisations, with some being by invitation, others via a tender agency (English Heritage, 2013). The briefs or contracts were found to be quite broad in what the interpretations might comprise in telling the story of each of the main characters at the different properties. It was interesting to discover the heritage organisations wished to stimulate, surprise, maybe shock their visitors with the interpretations, although it was not clarified why. This desire came across in each of the designers' explanation of their interpretations for fulfilling the brief and obviously formed the basis for the overall concepts. The designers' interpretation certainly produced fantastic and innovative forms of interpretative storytelling, particularly for Kensington Palace Enchanted Palace and House of Cards' interpretation, although the majority of visitors were not necessarily appreciative of the surprise element. Section 2.2.3 expanded on how visitors received the interpretations.

On the basis of my review of the case studies' documentation, the lack of visitor involvement actions or processes supports my view that the HSI design companies may not use a full UCD process in their design of heritage site interpretation.

Section 2.2.3. reviewed the types of visitors to heritage sites, why they might visit, their expectations of the visit and their experiences with each of the three heritage case study sites' interpretations. Valuable insight was provided from the comments about individuals' experiences of their visit.

Volunteer guides and visitor services have been seen to be immeasurably crucial in the different factors which help to form positive experiences for all types of visitors, according to the reviews on Trip Advisor and Facebook. Volunteer guides and visitor services staff can also be excellent

advocates for visitors if involved in the interpretation planning. HRP's example for the Enchanted Palace and House of Cards interpretation design shows how inclusive this can be and the effect it has on staff in their ability to help visitors engage with the interpretation. Social media channels and review sites such as Facebook and Trip Advisor have shown to be an insightful method of measuring how the case study heritage sites' interpretations have been received and perceived by visitors, although cannot be trusted implicitly.

The literature review (section 2.3) to follow will contribute to the knowledge of how effective a user (visitor) centred design process may be and how visitor interpretation had been monitored and measured.

In this section, the focus is on three themes involving effective communication of knowledge, process and experience in the design of interpretation at built heritage sites: dissemination, assumptions and visitors' experiences. The three themes were presented in the Research Aim Model presented in Chapter 1 (Fig. 1) designed to highlight a perceived gap regarding involvement of visitors.

DESIGN REFLECTION IN ACTION & USER CENTRED DESIGN (UCD)

THE NATIONAL TRUST
Lacock Abbey interpretation

ENGLISH HERITAGE
Bolsover Castle interpretation

CURATION (EXPERIENCES)
(communication between organisations/stakeholders/curators/designers/visitors, dissemination of knowledge/experience & assumptions

LITERATURE REVIEW: CURATOR~DESIGNER~VISITOR

USING & ENGAGING (EXPERIENCES)
(importance of visitor experience & engagement, involvement in interpretation design process i.e. UCD)

DESIGNING FOR INTERPRETATION (EXPERIENCES)
(communication between designers, curators, visitors, experience, knowledge, assumptions & design processes i.e. UCD)

DESIGN REFLECTION IN ACTION & USER CENTRED DESIGN (UCD)

DESIGN REFLECTION IN ACTION & USER CENTRED DESIGN (UCD)

HISTORIC ROYAL PALACES
Kensington Palace interpretation

Aims & Themes of Literature Review

Case Studies for reflecting on interpretation design practice

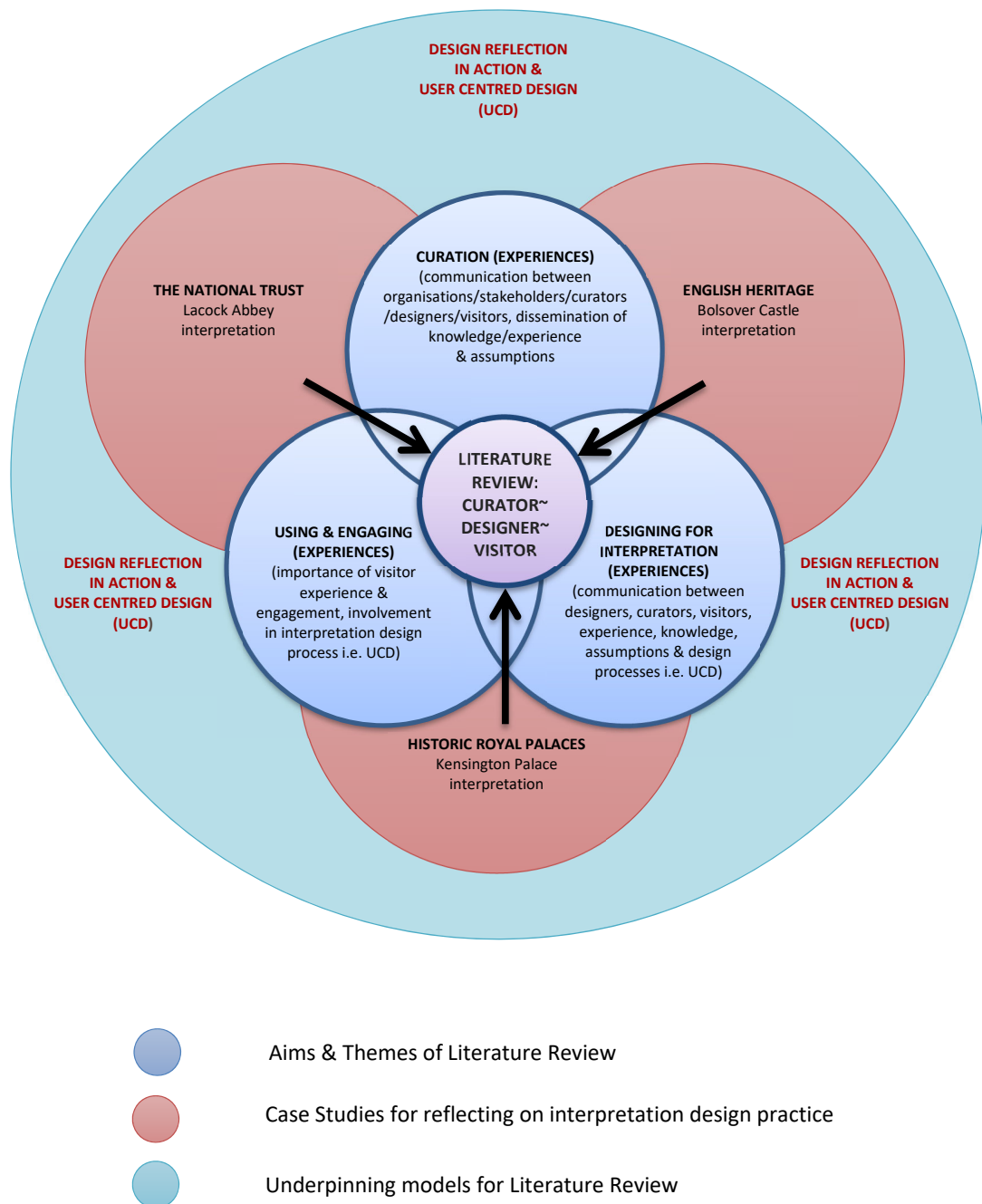Underpinning models for Literature Review

Figure 64: Literature Review components map (Wilson, 2015)

The first section of the literature review critically analyses different organisation's processes of designing interpretation, how knowledge and experience are communicated to others, what assumptions are made in the process and whether the visitor experience is at the centre of interpretation planning and decision making.

The second section of the literature review aims to understand assumptions that may be made in the design process of heritage interpretation design, between the curators and designers involved, and possible assumptions of their visitors.

The third section of the literature review aims to understand who visits built heritage sites and why. It also explores whether the use and engagement with heritage site interpretation provides a more fulfilling experience if visitors are involved in the concept and design stages. The practice of how this is being achieved, or could be achieved, is explored via reviews of visitor feedback for the three case study interpretations. Please see Fig.61 which maps the connections between the different components forming the structure of the literature review.

There has been considerable research (Bagnall, 2003; Griffiths, 2004; Karp, 2004; Russo & Watkins, 2004; Veverka, 2005; Hems, 2006; Tallon & Walker, 2008b; Kocsis & Barnes, 2009; Ray, 2009; Trant, 2009; Williams, 2009; Simon, 2010; Ballantyne & Uzzell, 2011; Linge *et al.*, 2012; Giaccardi, 2012b; Cairns, 2013; Louw & Crowley, 2013; Steiner & Crowley, 2013; Ioannidis, Balet & Pandermalis, 2014; Ciolfi & Bannon, 2002; Avram & Maye, 2016; Heath & vom Lehn, 2009; Maye *et al.*, 2017; Hornecker & Ciolfi, 2019) regarding interpretation at large scale museums such as the Tate, the Natural History Museum and the Victoria and Albert Museum, which focuses on developments in digital media, the use of social media for communicating with their audience and developments in participatory/co-design approaches i.e. involving visitors in the design of interpretation. The work and research in these areas demonstrates that collaboration and inclusion of museum visitors adds a better level of engagement, and more meaningful visitor experiences. Organisations such as the Museum Computer Group (MCG), Museum and the Web, (MWW), Museums and Heritage, and Museums Association also provide excellent articles in the use of technology for interpretation. In America and Australia, research by notable figures in the

museum industry i.e. Nina Simon[64], Angelina Russo[65] and Jerry Watkins[66], and Nancy Proctor[67], has continued to influence other countries in the innovative use of technology and audience participation at museums. The body of work from these and others has helped considerably in understanding curatorial practice and interpretation at museums, in particular the use of a participatory approach for enhancing engagement, and use of technology for more visitor interaction with the exhibits. However, information available regarding curation at heritage sites (historic houses, abbeys, ruins) is minimal by comparison; hence my systematic review has needed to include interpretation design and visitor experiences at heritage museums as well as built heritage sites.

The general nature of interpretation at a museum is to inform the visitor about each of the items on display, putting items in context, threading a narrative about how they may have been used. For a heritage site (buildings or ruins) the focus usually follows an important period covering the life of the owner or community that lived there. Their personal stories or stories of their life build the narrative rather than specific items, imbuing a sense of place (Uzzell, 1996; Scott, 2012). Both aim to enhance visitors' awareness of the past and provide an understanding of time and place (Uzzell, 1998). The focus of this thesis is primarily on built heritage sites, stemming from my experience and practice of crafting heritage site interpretations (HSI), such as the ones for Beaulieu Abbey and Dunster Castle. Therefore, although I appreciate that understanding the role of curation and methods used are important for all heritage categories, this section continues to focus on heritage site interpretation.

The summary reflects on each of the three themed sections, comparing practice from the case studies with the theories analysed through the systematic literature review. The Chapter summary is then taken forward for discussion with the fieldwork interviews in Chapter 3, section 3.1 Evaluation & Discussion.

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[64] Nina Simon, Director of Community Engagement: Santa Cruz *Museum* of Art & History, author of the *Museum 2.0 blog* and her book '*The Participatory Museum'* (2010)

[65] Angelina Russo, Associate Dean, Research in the Faculty of Arts and Design, Professor of Cultural Practice, University of Canberra. She is co-founder and Director of *Museum3*.

[66] Jerry Watkins, Associate Professor, Communications, Director, News & Media Research Centre, Faculty of Arts & Design, University of Canberra. Co-author with Russo for several papers including Digital Cultural Communication.

[67] Nancy Proctor, Deputy Director for Digital Experience, Baltimore Museum of Art. Co-Chair of the Museums and the Web annual conference. *www.museumsandtheweb.com/author/nancyproctor/*

2.3.1. DISSEMINATION OF KNOWLEDGE & EXPERIENCE

The case studies' 'Dissemination of Knowledge and Experience' review raised areas concerning:

- The importance of experience, knowledge and cultural backgrounds in the different roles involved in developing heritage site interpretation, i.e. how sites adapt to the growing need for a wider set of skills and experiences in developing engaging interpretation projects for multiple audiences
- Lack of visitor involvement in interpretation project conception and development

As a heritage site visitor, stories imbued with the buildings and 'place' pique curiosity and imagination. The use of a range of factually concise and brief interpretation panels such as shown in Fig.65, 66 and Fig.67 below, generally provide little evidence of engaging 'life' snippets of the inhabitants to satisfy these questions or visitors' curiosity of a past culture. From research, information was generally sparse[68], visitors relied on talking with volunteer guides to glean more information, refer to a guidebook or research after the visit (Black, 2011; Falk & Dierking, 2013; Ham, 2013).

Figure 66: Hyde Abbey Gatehouse Interpretation Panel (Wilson, 2014)

Figure 65: Beaulieu Abbey Domus Interpretation Panel (Wilson, 2014)

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[68] Interpretation panels at National Trust and English Heritage sites are designed to be unobtrusive, the objective being for visitors to enjoy the ambiance of the room set in a particular era, or external space, without labels jarring the setting. (Hems & Blockley, 2006; LookEar & Lovell-Chen, 2010; Ham, 2013)

Figure 67: English Heritage Interpretation Panel at Kenilworth Castle (Furse, 2017)

Children's guidebooks purchased for their storytelling and cartoon style images to reveal information about the lives of the inhabitants, providing knowledge of the building's history, the community, culture and era involved, almost at a glance (see Fig.68 and Fig.69 examples below). Adults were expected to understand the same information from facts and figures on the panels and in guidebooks, or refer to volunteer guides to bring the past inhabitants to life with similar stories embellishing the facts. Adults also digest knowledge more easily than blunt facts, through the use of storytelling (Nash, 1994; Miller, 2008; Phillips, 2012; Tallon & Walker, 2008b), therefore, various levels of storytelling should be a consideration in all heritage site interpretation.
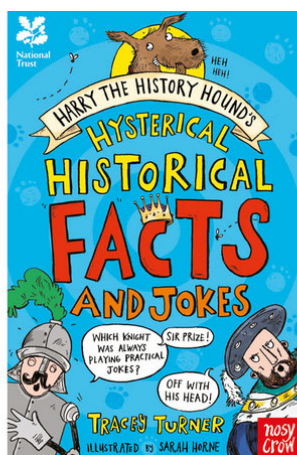

Figure 68: National Trust Hysterical Historical facts Children's Book (The National Trust, 2014)
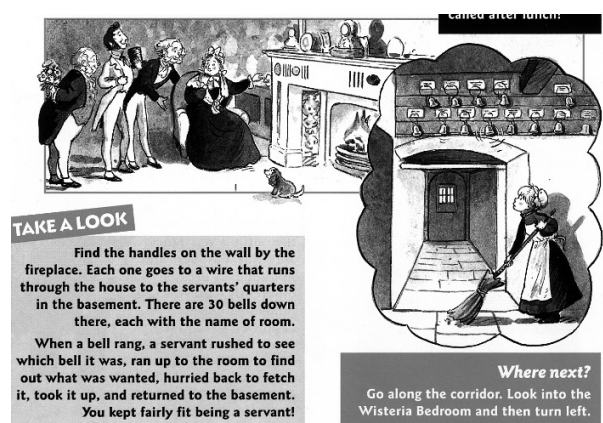

Figure 69: The National Trust's Children's Dunster Castle Guide Book (The National Trust, 2003)

The 'facts' provided on the interpretation panels are generally decided on by the curator or archivist, to highlight important historical events. In the case study examples, it was the volunteer guides who humanised the facts through storytelling, which is also the case in many other heritage sites and museums (Gaffikin, 2012; Taylor, 2006a; Falk & Dierking, 2013). The provision of audio and video tours help in this respect, but again, the content is directed, it is mostly factual and an extension of the interpretation panels. The rich storytelling provided by the guides and those engaging snippets providing an insight to past lives, vary depending on the guide in place at the time. Through conversations with previous visitors and involvement with the site, guides are able to add to their stories, re-shaping and moulding the stories to their audience. Return visits to sites which use volunteer guides, therefore offer visitors an opportunity for new stories, new snippets, unlike those with primarily audio guides and interpretation panels. Visitors may also unknowingly become part of the guide's storytelling (Taylor, 2006a; Falk & Dierking, 2013; Scott, 2012). The richness and personalization of the guides' stories create an experience for visitors they may remember, and possibly discuss beyond the visit (Johnsson, 2006; Joeckel, 2002; Scott, 2012).

Although the National Trust has over 60,000 (2013-14) volunteer guides across their properties (Jenkins, 2014), access to guides at larger sites is not always possible. Providing the snippets and rich stories via additional means such as games, social media channels and interactive touch screen panels may, therefore, be ideal. The internet allows visitors to explore an area of interest in more detail post visit, yet information provided at the time of visit helps to create more memorable experiences by eliciting emotional responses (Black, 2005; Beck & Cable, 2011; Ham, 2013:p.82; Falk & Dierking, 2013:p.192). Engagement with interactive panels can be for the whole group, unlike audio tours where wearing headsets or earphones may exclude interaction creating a more solitary experience (Black, 2005:p.193; Falk, 2009b:p.218; Roberts, 2014:p.194).

The variety of platforms available at a heritage site is perhaps not the problem in engaging visitors with information. This often lies in the content that is made available through them, and how this is developed and managed; traditionally the domain of the curator. Evolving changes in technology provides additional ways in how visitors can access information (Black, 2011; Soren, 2009; Fahy, 2004). Visitors may have personal mobile devices which can be used to access information. Through their own devices they are also able to personalize their experience by searching the web for further information on areas of specific interest (Hems & Blockley, 2006; Falk & Dierking, 2013; Ham, 2013), although this information may not be from trusted and reliable sources, therefore possibly resulting in misinformation (Falk & Dierking, 2013). According to Falk and Dierking:

*'Professionals worry a great deal about the misinformation they hear conveyed in their museums, yet they may contribute to it by providing information that does not answer the questions important to the visitor or by using concepts or vocabulary unfamiliar to the visito*r.' (Falk & Dierking, 2013:p.124)

Curators are, therefore, being required to learn how to incorporate the additional platforms and generate interpretation content in many different ways, or work with others already experienced in doing so. The case studies highlighted collaboration between a variety of experts and heritage organisation staff for building their visitor experiences through a range of interpretation platforms and methods. Research has shown that multiple platforms are becoming a more usual occurrence for museums and heritage organisations in general (Falk & Dierking, 2013; Scott, 2012; Soren, 2009; Hooper-Greenhill, 2003; Ciolfi & McLoughlin, 2012; Avram & Maye, 2016; Jafari, Taheri & vom Lehn, 2013; Heath & vom Lehn, 2008; Maye *et al.*, 2014; Hornecker & Ciolfi, 2019), therefore, a range of skills and expertise in choosing and communicating differing levels of historically correct information via a multitude of methods is becoming a necessity. Scott (2012) and Dicks (2000) discuss the importance and validity of what is chosen to represent cultural histories at museums and heritage sites, and by whom. Dicks cites an example of the complexity involved with 'Rhondda Heritage Park'[69] which resulted in a set of audio-visual shows conveying messages about an 'imagined' Rhondda community mixed with 'wider issues of class solidarity and gender divisions' (Dicks, 2000:p.67). This was mostly due to the government's 1980s push for local authorities to become more independent and the subsequent positioning of Rhondda as a flagship for their 'entrepreneurial model of development'. To achieve this, they used an external heritage and entertainment company, experienced in creating the Yorvik Viking Centre 'Experience' (Dicks, 1997) to develop the site as a heritage centre. The community were concerned that the consultancy would not portray their history realistically, therefore a local historian, and mining struggles' documenter, Dai Smith, was brought in to embed local historical information in his known style of positing the past as inspiration for the present (Dicks, 2000:p.65) (see Figs. 70 & 71).

Visitors to Rhondda are thus presented with information about a community in which the 'reality' has been altered. Had the local authority approached this in a different way – such as the National

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[69] Rhondda Heritage Park, South Wales, former colliery buildings transformed into a heritage museum in the 1980s by a foremost heritage and leisure professional company which caused considerable speculation about the validity of how the community would be represented. A local historian was then tasked to work closely with the heritage company to ensure facilitation of suitable interpretation. Three audio visual shows were created to cover 'the consultant's creative treatments based on 'thrills and spills', and the historian's detailed and socialist-driven historical narrative'. (Dicks, 2000:p.65)

Trust does with their 'new' properties, i.e. spoken with the community and drafted a statement of significance, Rhondda Heritage site's 1980s interpretation may not be cast as a 'sinner'. A phrase used by Uzzell (1996) when describing how heritage can be used for creating a 'reactionary, superficial and romantic view of the past' (Uzzell, 1996:p.1).

Figure 70: Rhondda Heritage Park Museum, Black Gold Experience (Rhondda Cynon Taf County Borough Council, 2014)

Figure 71: Rhondda Heritage Park Museum, Black Gold Experience (Rhondda Cynon Taf County Borough Council, 2014)

Creating a heritage centre from buildings and an industry recently closed down, should have fully involved the community with a local heritage curator to glean the community's experiences of working in the colliery and how the community was formed. By working more locally with a professional curator, rather than a well-known historian/documenter would have helped to ensure a non-biased view of the recent living and historical past. It may also have pulled the community together more and helped to create ownership and perhaps, therefore, a continuation of their community and a sense of place (Uzzell, 1996; Scott, 2012). The community experiences would have created rich, compelling stories for visitors to understand life in and around a colliery, instead of the politically imbued narratives provided.

2.3.1.1. KNOWLEDGE BUILDING EXPERIENCE

In each of the case studies, and the Rhondda example above, the heritage organisations involved employed a range of experts who were experienced in their roles as curators, specific subject curators, historians or interpretation managers. Their knowledge and experience enabled them to ensure the content of interpretation projects were at a particular level that would be suitable for their visitors; this has not always been the case.

Traditional curators and designers were once considered arrogant, to know best, to instruct rather than share knowledge (Bradbourne, 1997; Russo & Watkins, 2005; Poole, 2011; Linge *et al.*, 2012;

Ellner, 2013). With the rise of digital technology and use of social media, the traditional approach is being forced to adapt, to liaise and communicate more widely with their public (Kotler & Kotler, 2000a; Coffee, 2008; Ray, 2009; Soren, 2009; Trant, 2009; Janes, 2010a; Thomas, 2010; Easton, 2011; Rounds, 2012). Heritage organisations/sites are looking to reach a wider visitor demographic (Thurley, 2005; Taylor, 2006a; Cowell, 2008), mostly due to government changes in legislation and financing, and therefore, the need to expand visitor numbers. The increased use of digital platforms and social media has brought many changes for the heritage industry (Fahy, 2004), especially in the way they disseminate knowledge and communicate with their visitors as noted above. From the mid-80's, museums and heritage sites installed technology *'for their promise to democratise knowledge'* (Griffiths, 2004), to engage visitors and widen their demographic. For example, the use of virtual environments and 3D representations allow visitors to explore 'collections' in context, either during their visit or after, via dedicated websites or social media, therefore information can be sought at will and shared (Pine II & Gilmore, 1998; Hogsden & Poulter, 2012; Cooke, King & Stark, 2014). Through social media and mobile technology, visitors are able to communicate their experience of a heritage site to a wider circle of friends, acquaintances and the heritage site visited (Simon, 2010).

The 'sharing' of experience and knowledge amongst friends, family and peers, being able to present an idea, and listen to other viewpoints has been proven to help the 'meaning-making' process (Copeland, 2006; Scott, 2012; Uzzell, 1996; Dicks, 2000; Soren, 2009; Veverka, 2005). Copeland suggests:

> '*When constructed meanings are shared through social interaction, including shared views or shared affective experiences often 'cognitive dissonance' is engendered as previous experience is tested against new ideas*.' (Copeland, 2006:p.92)

Involving visitors within discussions for new heritage site interpretation projects and throughout the development of a project would, therefore, bring a richness of understanding for all involved, challenging perceptions and past experiences. The knowledge built from experience in visits to different heritage sites, as visitors and not curators, can only add to the specialist curatorial and design knowledge provided by the curators and designers in the discussions.

Collaboration within a heritage organisation has not always been possible; working in 'silos' formed part of the 'traditional' mode of operation for many museums. Lang, Reeve and Woollard (2012) suggest museums have '*been through a rite of passage in transforming themselves*' and have '*seen phenomenal change, expressed in not only new policies, political interests and findings,*

but in the ambitions of all involved' (Lang, Reeve & Woollard, 2012:p.228). Dicks (2000) also suggests the appearance of a '*new breed of experience-centred heritage museums*' providing 'a *full interpretation of the past*' with aspirations '*to be inclusive and people-centred'* (Dicks, 2000:pp.61–62). Combined knowledge through collaboration within the organisation has proven to be beneficial for visitors as well as staff and volunteer guides in the Historic Royal Palaces' interpretation case study. Here it was shown that communication and dissemination of the interpretation intent proved highly beneficial to staff and visitors. The leadership and planning involved in sharing knowledge and inviting feedback across all staffing levels, created a cohesive, engaging experience and 'buy-in' of the interpretation vision for all involved in providing that interpretation. As Woollard (2012:p.220) states:

> *'[an] organisation as a whole needs to appreciate, encourage and invigorate both individual and collaborative learning. It needs to discuss and evaluate practice, to communicate lessons learnt to others and ensure that resources (time and funding) are set aside to enable further improvement through training, appraisals and regular cross-department team meetings.'* (Woollard, 2012:p.220)

A method of including visitors in the collaboration would, therefore, be a useful addition, providing benefits in shared knowledge and a feeling of ownership and community (Black, 2005; Scott, 2012; Soren, 2009; Ciolfi *et al.*, 2016; Ciolfi, Bannon & Fernström, 2008; Damala *et al.*, 2014; Heath & vom Lehn, 2009).

Designers, artists and other external organisations and companies working with a heritage site also need involvement at each step of the interpretation planning process. It was demonstrated via the case studies that the heritage organisations regularly worked with designers who had experience in creating interpretation for heritage sites. They specifically chose people/companies with heritage experience and were specialists in their areas. The curators would have a strategy, such as what is going to be interpreted, ideas on the type of interpretation and who the target audience may be. Designers then work with the curators and heritage team to 'execute' the strategy (Howard, 2003). 'How' should be in the form of an interpretative plan which is constantly reviewed and reflected on by a combined team of heritage staff (curators, front of house staff, marketing and volunteer guides), designers and selected visitors to ensure all objectives are met. This seems an obvious process and is probably in place in most interpretation projects, except for the inclusion of visitors (see next section for more detail).

The most successful of the case study interpretations (based on visitor feedback) were also where designers and the local community had worked closely with the heritage organisation to develop the concept or strategy, i.e. the National Trust at Lacock Abbey. The purpose of one of the interpretation projects had been instigated from visitors' interest in a certain period of the Abbey; they wanted to see how the abbey may have looked to understand how life was then, compared to now. The example highlights how a heritage site, displayed to represent information of a particular period (Matilda Talbot's era), although decided on with the local community at the outset, may still not fulfil all visitors' expectations. Choosing just one era (seen in each of the case studies) has a tendency to hide the heritage site's earlier or more recent history (Howard, 2003), presenting one lifestyle, and therefore dictating what visitors may learn and experience. Uzzell (1996) states: '*Museums and interpretive exhibitions have a crucial role to play in communicating to their visitors a sense of the identity of the place they are visiting*' (Uzzell, 1996:p.2), yet if the interpretation comprises lifestyle stories and images of a single generation of inhabitants, this may not be possible. Hems (2006:p.4) also speaks about the importance of the 'actual then and the fictitious now' for visitors to understand the significance of a heritage site in different periods rather than just one. With a room set as a period staged event, it is not possible to show how it might have looked or been used in a different period or periods; it might also be perceived as fictitious. Other events may have been glossed over which could have held more meaning for certain visitors, resulting in a lost opportunity to connect, construct and enhance their beliefs and experiences (Copeland, 2006; Soren, 2009; Hems & Blockley, 2006). It is perhaps an important aspect, therefore, to ensure there are opportunities for visitors to understand the full history and significance of the heritage site from which they can draw meaning and context.

Based on the literature, choice in what is being presented, with regards to interpretation, would appear to be an important consideration in creating meaning-making experiences for visitors.

Curators and designers are either being required to expand their skillsets to accommodate the increased choice, or work with experienced experts able to provide these skills.

It would also appear that the design of interpretation is more successful where there is collaboration, and engagement with suggestions and feedback from all involved, including visitors, throughout the interpretation process.

2.3.2. ASSUMPTIONS IN THE DESIGN OF HERITAGE INTERPRETATION

The purpose of this section is to explore literature around possible assumptions made between different combinations of the curator, designer, visitor triangle shown in Chapter 1, Fig. 1's research aim model. The purpose of this section, therefore, explores whether the processes used are sufficient for ensuring a successful visitor experience focusing on the two main areas arising from the case studies:

- The minimal use of design processes such as a collaborative or user centred design process in developing interpretation projects i.e. involving visitors in the design of interpretation projects
- The use of defined interpretation project briefs as opposed to broad and less well defined in developing successful interpretation projects as part of the design process.

As we saw in the previous section, the focus on academic practices of in-depth research of artefacts, sites and collections now needs to change to include being able to engage the public with the results of their research. Curators have, therefore, needed to add to their skillset, methods of communicating to a wide range of ages, interests, backgrounds and levels of knowledge. The developments at built heritage sites to facilitate wider access have brought new roles, some of which may overlap with the role of the curator, for example, an education/interpretation officer. Internal and external influences may affect the intended interpretation before it reaches the designer or visitors. Understanding the effect of possible influences will help in developing a process that factors in results of the possibilities at the outset and/or diminish the overall effect on the outcome.

How curators arrive at their interpretation concept will often be influenced by the stance of the organisation in which they operate. Hewison and Holden in Clark, (2006) suggest that there are three influencing groups of stakeholders: public, professionals and politicians/policymakers (Clark, 2006:p.16) which link to three areas of cultural values: intrinsic, institutional and instrumental. This model works well in explaining the types of external influence the curator may be subjected to within their role. Although used in a different context, Lowenthal's (1997) expression that '*no historian's view is wholly free of heritage bias*' maintains this theory (Lowenthal, 1997:p.x preface). The curator's cultural background, interests and disposition act as the internal influences that may also shape the concept and subsequent outcome of the interpretation (Lawson & Walker,

2005:p.15; Terwey, 2008:p.12). With the external and internal influences in place, the curator still needs to '*accurately capture – and appropriately analyse – audience requirements from the bottom-up, in order to design an entertaining, stimulating and representative exhibit*.' (Russo & Watkins, 2005:p.4)

One of the case studies highlighted a requirement by the curatorial team for the interpretation to be designed to entertain and surprise visitors (Historic Royal Palaces, 2011b); another required interactive interpretation such as 'talking heads', projections and a multimedia tour (Banks, 2013). Decisions appeared to be made from suggestions of 'what might be good to have, to surprise or to shock' rather than from any curator bias or knowledge of visitors' expectations. There can be a greater sense of self-satisfaction and accomplishment in discovery, creating a memorable experience. Conversely, if not successful in their personal quest, an adverse experience may occur. Curators and designers, therefore, need to be careful in assuming that all visitors want to be led and fed information in a particular order; some visitors may prefer to discover their own information about a particular space or historical event (Hooper-Greenhill, 2003; Scott, 2012; Howard, 2003; Falk, 2009a). We saw in previous sections how visitor feedback from the Enchanted Palace exhibition highlights this quite well, with some visitors (primarily those who had not visited the Palace previously and had come to see the exhibition) enjoying the theatrical elements, whilst the traditional visitors (those re-visiting) were disappointed and disliked the 'new' style of interpretation (Humphreys, 2012; Gaffikin, 2012; Rank, 2013).

Designing interpretation for different audiences in a mix of styles (led/self-directed) and media is widely discussed by academics and museum professionals (Hooper-Greenhill, 2003; Howard, 2003; Black, 2005; Falk & Dierking, 2011; Lang, Reeve & Woollard, 2012; Scott, 2012; Ham, 2013; Ciolfi, Bannon & Fernström, 2008; Ciolfi, 2012b; Maye *et al.*, 2014; Heath & vom Lehn, 2009) with terms such as collaboration, greater engagement and experience occurring frequently. In Kotler and Kotler's 1998 edition of Museum Strategy and Marketing, they state in their preface:

> '*The most successful museums offer a range of experiences that appeal to different audience segments and reflect the varying needs of individual visitors …To the extent possible, successful museums provide multiple experiences: aesthetic and emotional delight, celebration and learning, recreation and sociability...*' (Kotler & Kotler, 1998:p.xx).

In their 2008 edition they have updated this to reflect the changes that are occurring in museums by adding:

> *'Regardless of style, all museum visitors seek benefits, value and unique experiences. To the extent possible, successful museums provide multiple experiences satisfying multiple needs...Competitiveness in the marketplace has made necessary the adoption of consumer-centred approaches'*(Kotler, Kotler & Kotler, 2008:p.xxiii).

Ham (2013), Veverka (2010) and Black (2005) suggest processes by which elements of multiple experiences can be achieved, with Black providing information of the UK Heritage Lottery Funds' Audience development plan (Black, 2005:p.63) (see Appendix J for more detail). Listed in the plan are questions that would be logical for any organisation or company wanting to grow their consumer/customer/audience base and therefore their offer, such as 'who do we want our audiences to be in the future, how do we reach them and what will we offer them?' They form part of a fundamental set of questions used within marketing and management (Drucker, 1999). These are also questions that designers may seek to answer in the form of personas, typical of a user-centred design process (Potter, 2002; Abras, Maloney-Krichmar & Preece, 2004; Kuniavsky, Goodman & Moed, 2012; Smashing Magazine, 2015; Curedale, 2016). Design theorist Donald Norman coined the term 'User-Centred Design' (1986) to describe a process stemming from user testing. User-Centred Design (UCD) means that as a designer, you immerse yourself in your users' world to understand what they do and why (see Fig 72 below).
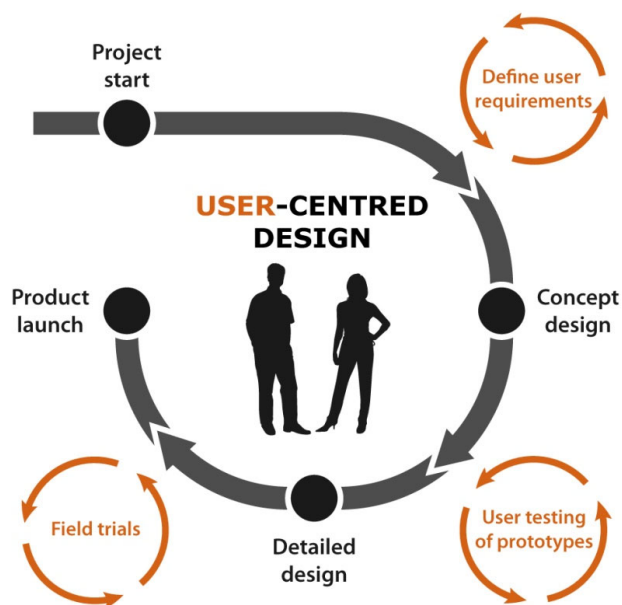

Figure 72: User Centred Design Diagram. (Wellings, 2013)

By integrating insights from sociology, anthropology and psychology into the design process, designers are able to have a richer understanding of their needs and wants, enabling a more successful experience with the designed artefact/interpretation. Checking and testing with actual users throughout the process helps to ensure the outcome has 'buy-in' from the users, and therefore, is successful. Personas or user profiles are used as part of the UCD process to focus on the different user types as fictional characters, synthesised from observations of many. Profiles include daily routines, interests, fashion styles and age, perhaps varying with each design project, and used to share with team members.

Nonetheless, although designers, through the use of personas and user journeys, may have a thorough understanding of who their visitor may be, they may not know the reason for visit or have control on their emotional state during their visit to a heritage site, therefore personas are used as an insight and guiding element in their design process (Roberts, 2014:p.194). Design as a process has several specialisms within different design disciplines such as engineering, architecture, industrial and interpretation design (Cross, 1984). Each follows a design process similar to a user centred design process which can be seen in the table below (Fig.73):

Typical Design Process	Engineering Design Process	Architectural Design Process	Product/Industrial Design Process	User Centered Design Process
Initiate	Identify need or problem	Define the problem	-	Define user requirements
Investigate	Research Criteria	Collect information	Research	-
Generate	Brainstorm possible solutions	Brainstorm	Concept	Concept design
Ideate	Select best solution	Analyse	Design	-
-	Construct Prototype	Develop solutions	Development	User testing of prototypes
Evaluate	Test	-	-	Detailed design
Communicate	Present Results	Present ideas	Design documentation	Field trials
-	Re Design	Improve Design	Prototype	Product launch
			Engineering	
			Production	

Figure 73: Design Disciplines and their Process. (Wilson, 2017)

The notable variables when each process is compared to the UCD process are primarily 'defining user requirements' and 'user testing'; there are elements of testing which may include users in the engineering process, and may also occur in other design processes although are not mentioned above. The core difference is that users are core to UCD at each stage of the process, with

research carried out through to the field trials' stage. UCD is considered a subset of Human Centred Design[70] and is becoming more important in the design industry for developing positive experiences through collaboration with multi-disciplinary teams.

Another important aspect to most design processes is that they have moved on from a traditional, closed, linear process to a more open-ended, cyclical process. This has become a key aspect especially for the majority of the design disciplines, in particular interpretation designers and other disciplines that follow the Design Thinking methodology such as User Experience (UX) designers and Experience designers (XD). Lockwood (2009) provides a succinct overview of Design Thinking which explains how it fits within the design industry:

> *'Design thinking is essentially a human-centred innovation process that emphasizes observation, collaboration, fast learning, visualization of ideas, rapid concept prototyping, and concurrent business analysis, which ultimately influences innovation and business strategy. The objective is to involve consumers, designers and business people in an integrative process, which can be applied to product, service, or even business design.*
>
> *It is a tool to imagine future states and to bring products, services and experiences to market. The term design thinking is generally referred to as applying a designer's sensibility and methods to problem solving, no matter what the problem is. It is not a substitute for professional design or the art and craft of designing, but rather a methodology for innovation and enablement.'* (Lockwood, 2009:p.xi)

Although there are several sets of design processes, designers continue to adapt processes to suit their preferred method and their discipline. An excellent example of this can be seen in Fig.74, where McWeeney (2016) expresses his version of a design process that mixes a UCD, HCD and Design Thinking[71] approach.

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[70] Human Centred Design (HCD) methodology involves the human perspective but does not necessarily involve users in the process used for planning and crafting of a designed artefact that will suit their needs. IDEO states: 'HCD is a creative approach to problem solving and the backbone of our work at IDEO'(IDEO, n.d.). The process is simplified to three stages of 'Inspiration, Ideation and Implementation'(McWeeney, 2016).

[71] Design Thinking was applied to business by David Kelly, founder and chairman of IDEO in 1991. Prior to this the term design thinking has been used to frame the concept of 'design thinking', the most notable examples are Lawson's book 'How Designers Think', Cross's 1982 article 'Designerly Ways of Knowing' with more recently a book titled 'Design Thinking' and Rowe's 1987 book 'Design Thinking'.

The five sections stemming from a typical UCD process, but subtly changed to describe the actions McWeeney has experienced in his role as a UCD designer, highlight how different designers' experiences reflect their actions. The diverging and converging thinking curves through the three

MY USER CENTERED DESIGN PROCESS REMIX

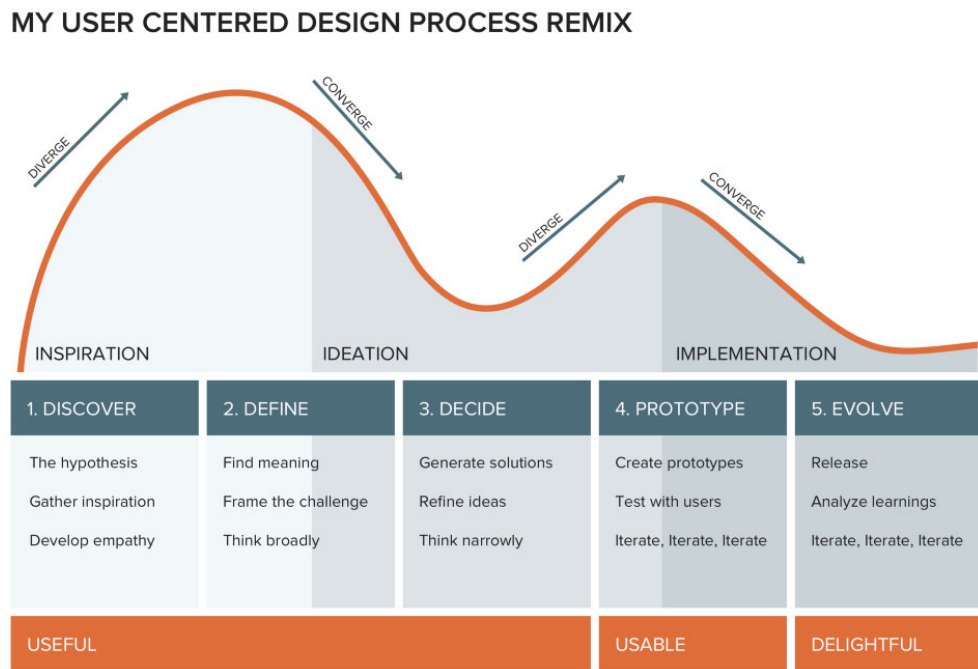| 1. DISCOVER	2. DEFINE	3. DECIDE	4. PROTOTYPE	5. EVOLVE
The hypothesis	Find meaning	Generate solutions	Create prototypes	Release
Gather inspiration	Frame the challenge	Refine ideas	Test with users	Analyze learnings
Develop empathy	Think broadly	Think narrowly	Iterate, Iterate, Iterate	Iterate, Iterate, Iterate

| USEFUL | USABLE | DELIGHTFUL |

Figure 74: Designer role: summary of meaningful text segments from practitioner interviews.(McWeeney, 2016)

HCD principles of Inspiration, Ideation and Implementation to demonstrate the areas of the design process where they think widely about the problem, narrowing the ideas then expanding in their exploration of developing those ideas before then narrowing again to a solution that is implemented. The abduction thinking process contrasts significantly with previous design reasoning of deduction and induction (Cross, 1984, 2011; Chandler, 2015; Lockwood, 2009). Another example is McKinsey Digital Labs' model in Fig.75 overleaf. The linked cycles of design, technology and strategy through the UCD process have been considered through a business perspective. The colour coding works well in highlighting the importance of timing for the three cycles, particularly regarding different considerations of available technology. McKinsey's braided design model clearly defines the steps for each element of the process demonstrating the involvement of customers, designers, technologists and stakeholders.

The multinational company, McKinsey, promotes the HCD derived Design Thinking approach to large companies and organisations as a method of bringing staff together through design, i.e.

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design-led. They believe that: *'design should take an active role in bridging multiple functions—including finance, legal, IT, marketing, and operations—so that these groups can not only be part of the process but also start to directly understand the value that design can deliver'* and people with the right skillsets and experiences are utilised in the right space for the collaborative discussions to be effective (Kilian, Sarrazin & Yeon, 2015:p.3).

A "BRAIDED" DESIGN MODEL

Design
Strategy
Technology

Frame
- Map business opportunity and strategy based on market and organizational factors
- "Trendscrape"; identify user needs and define experience principles
- Identify technology developments; assess current technology environment

Cocreate
- Reframe problem statements based on customer feedback
- Define value proposition
- Conduct workshops with customers and experts to cocreate optimal experience
- Identify data and technology

Prototype
- Build rapid prototypes
- Iterate design as required with customer feedback
- Create technology-development (agile) plan
- Build business case

Validate
- Test usability
- Assess technology, process, and organizational needs for realization
- Validate with overall business strategy

Govern
- Role model best-practice innovation process tied to business strategy
- Build governance model for ongoing investment and evolution
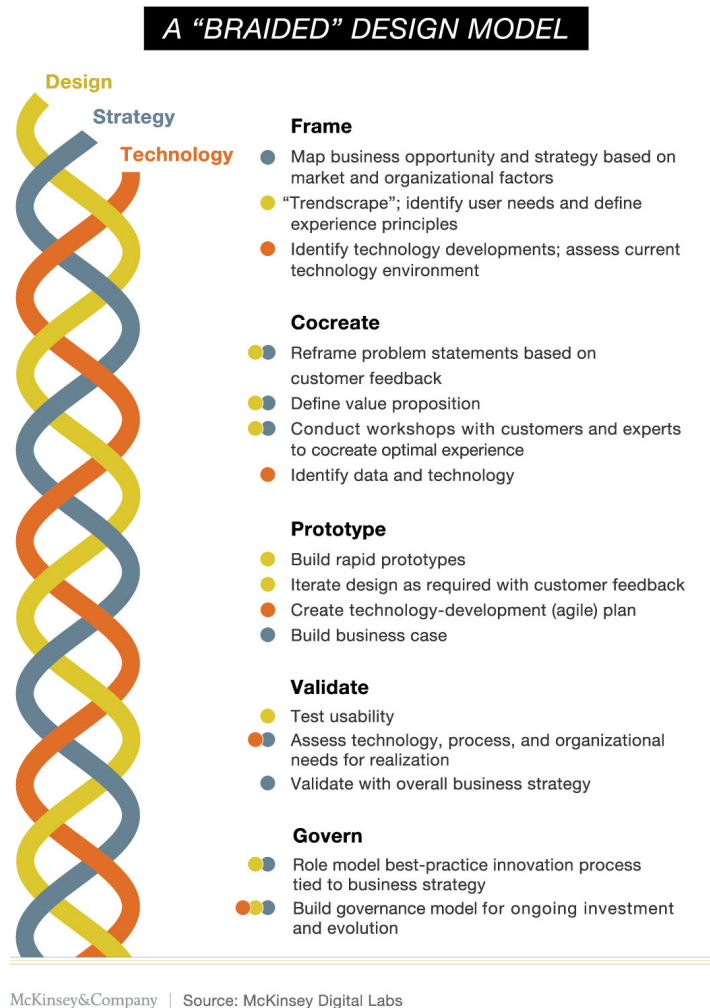
McKinsey&Company | Source: McKinsey Digital Labs

Figure 75: Design driven culture model developed by McKinsey & Company. (Kilian, Sarrazin & Yeon, 2015)

Each project or problem that needs solving requires designers to draw upon their different experiences, skillsets and abilities. Interpretation designers often require experience in many disciplines. They need to be able to communicate clearly and diplomatically, leading/guiding clients to understand the complex issues involved in what may appear to be a simple solution.

They need to collaborate with a range of different craftspeople, tradespeople as well as the curatorial team, stakeholders and visitor groups or visitor advocates, on occasion possibly also acting on behalf of visitors in explaining visitors' needs and behaviours. The designer would generally work with their preferred design process, although it may be dependent on the project which approach, process or method a designer will use, and the designer's skills, abilities and experience.

In Roberts (2014) Interpretation Design study, she interviewed eight designers (five consultants and three in-house) about their role in interpretation design; some of the issues raised included: '*audience testing and evaluation are rarely included in the design process*' (Roberts, 2014:p.195). Fig.76 below highlights the summaries from her discussions with the designers:

Interpretation Designer Roles:
Consultant Designers
• Our role varies so much from project to project, depending on the content, site, client experience and intent.
• A designer puts together the way in which the public interacts with not only the objects, but the experience of being amongst those objects, in a live sense.
• My role is to question the intent of the proposed exhibits and to make them work harder and become more meaningful.
• Our role starts with creating an environment where people (stakeholders) feel safe to express their opinions to collaboratively develop an approach that everyone owns, that is achievable and clear.
• Some designers are aesthetically driven; some design for the appreciation of their peers; some focus on telling stories through objects, which may over-ride aesthetic principles.
• A designer has to prove to the institution that they care about their collection, share their passion and aspirations.
• Ideally, designers have an ongoing conversation with curators, specialists and writers to shape stories and create focal points.
• Designers shape cognitive understanding, but also deeper, emotional aspects that are potentially life-changing.
• Designers act as advocates for the audience needs and interests in the design process.
Design Staff in Major Institutions
• A designer's role within the broader project team is pretty clear, guided by a detailed brief.
• The design team plays a significant role in shaping the project physically and conceptually.
• We've got to embed meaning in everything we do rather than using design for design's sake.
• You may have to design for an audience very different from yourself and your peers; the designer has to represent the audience in the development process.
• A designer's role is to consider the most effective ways to engage all of the audience's senses to connect them with the subject.

Figure 76: Designer role: summary of meaningful text segments from practitioner interviews. (Roberts, 2014: p.196)

Overall, Roberts found that the interpretation designers were not always brought in at the right moment of the interpretation planning, their roles often expanded beyond that of the project brief to include '*extensive research, curatorship, mediation, cultural liaison, text development and solving way finding problems*' (Roberts, 2014:p.199). The expectation of work and role provided by the briefs also did not match the actual project requirements i.e. once the work was progressed, changes developed due to a lack of design experience by the organisation in their initial planning stages. The last aspect reflects findings from two of the case studies in that the project briefs were quite broad, perhaps intentionally, to provoke a broader creative outcome, but possibly also due to a lack of understanding in the different roles that may be involved in designing the overall interpretation.

The Design Thinking business approach believes in design-led projects, which is becoming more popular for business organisations, for example IBM. This may not work with heritage site organisations, although similar to business organisations, the move towards more involvement with consumers, is being echoed in an increasing involvement with visitors by heritage organisations, and designers with users.

Assumptions are highlighted as the main consideration in this section: assumptions made in the initial planning regarding what visitors may wish to 'experience', who the visitors are, the possibilities that a contracted design team may bring to an interpretation, and how the interpretation project will be experienced. There are also assumptions in what a design process might involve.

In research regarding UCD examples, visitors/users are considered; they are core to the planning and decision making processes, and therefore can be attributed to following a UCD process. One or two business examples such as case studies outlined by McKinsey Digital Labs specify users' 'physical presence' involvement and active engagement, rather than a mental consideration of them (Kilian, Sarrazin & Yeon, 2015; Breschi *et al.*, 2017). For HSI, this does not seem to be the case, i.e. visitors as part of the design and planning team throughout the interpretation process. Instead, they are represented by personas or advocates. However well informed or researched, assumptions have been made about how visitors may behave, or may change in behaviour depending on emotions they bring with them on the day of visit, or invoked/provoked by the heritage sites' interpretations or sense of place (Black, 2005:p.195). There are instances of

involvement at the beginning, i.e. the National Trust's community strategy on newly acquired sites, and towards the end, for testing or feedback, but not throughout the process.

Broad briefs allow assumptions for the design team in how they will interpret the brief, and assumptions by the heritage organisation in how that brief will be delivered. Bringing in designers, visitors and others that may be involved at the beginning of the process to discuss the 'what, why, who and how' (Veverka, 1994) through the UCD process steps of 'Discover, Define, Decide, Prototype and Evolve' (McWeeney, 2016) would help to create a unified project plan in which all parties collaborate to create a shared interpretation vision or strategy and therefore a better understanding of what would be required (Lawson & Walker, 2005:p.23).

The project brief and meetings would benefit by not being didactic and instructive, instead allowing for discussion and divergent thinking when and where it is needed i.e. plans might change, new opportunities arise, but the brief should still adhere to the long term vision (Potter, 2002; Black, 2005; Ham, 2013). The voices and experiences of the stakeholders, professionals, historians, designers, technologists and visitors should form an ongoing discussion through an embracive UCD process, with regular meetings (attended by all as a priority) and sharing of experiences to create deeper understanding of the complexities involved in designing and creating successful heritage interpretation (Petrelli *et al.*, 2016).

2.3.3. THE IMPORTANCE OF VISITORS' EXPERIENCES IN SHAPING HERITAGE SITE INTERPRETATION

The purpose of this section is to explore literature on how visitors' feedback and critical understanding how visitor involvement might work for all heritage sites. Therefore, the areas that will be covered in this section include the following:

- The importance behind how heritage organisations view and measure the success of a heritage interpretation project via the use of visitor experience questionnaires
- The importance of social media and review data as a measuring tool for understanding visitors' experiences from their perspective
- Credibility and validity of reviews
- The importance of visitor services, advocacy and involvement of communities/visitors in shaping visitor experiences

Visitors visit heritage sites for many reasons, not always for information or learning (Markwell, Bennett & Ravenscroft, 1997; Doering, 1999; Pine II & Gilmore, 1999; Falk & Dierking, 2000). Many are seekers of experiences of the past, perhaps to make sense of where they are now and how they came to be there (Falk, 2009a). From the heritage site case studies, it was clear that curators are becoming more receptive to the 'needs' of their visitors which help to form their experiences. In the last fifteen years, museums and heritage sites, in general, have begun to consider the needs of their visitors first, rather than the traditional attitude of 'this is what we have chosen for you to learn about', i.e. a dictatorial stance, structured and controlled (Markwell, Bennett & Ravenscroft, 1997:p.106; Russo & Watkins, 2005:p.10; Cairns, 2013:p.9). What is also becoming more evident is a growing interest in understanding the importance of experiences formed during a visit, and how visitors choose to communicate their experience to others, i.e. family, friends and the heritage site visited (Hooper-Greenhill, 1994; Falk, 2009a; Ciolfi, 2012b). The importance of designing and planning the 'right' style of interpretation visitors may be expecting from their previous experience, or from reviews they may have read, is as important as providing comfortable facilities, welcoming guides and a place for relaxation in forming those experiences (Kotler & Kotler, 1998; Laws, 1998; Taylor, 2006b; Morgan, 1996:p.25).

Museums and heritage sites now have to compete to provide a day out with other venues, who are more used to catering for visitors wanting to spend time free time relaxing or seeking enjoyable experiences such as leisure centres, theme parks and adventure parks (Morgan,

1996:p.24; Pine II & Gilmore, 1999:p.3; Kotler & Kotler, 2000a:p.272; Falk, 2009a:p.186). Built heritage sites[72] have traditionally been a large part of the UK tourism industry and growing in popularity (Markwell, Bennett & Ravenscroft, 1997), particularly so with televised historical dramas and specialist historical architectural and archaeological documentaries (Morgan, 1996; Laws, 1998; Hooper-Greenhill, 2004). One third of the UK's population agree that heritage is a major consideration of where they visit (Eliot cited in Baroness Andrews. *et al.*, 2020). Cowell, Director General of Historic Houses, stated (2020) that there are approximately 26 million visits to historic houses, with 48% of inbound tourists visiting historic houses and castles (Baroness Andrews. *et al.*, 2020). Where museums and heritage sites once relied on funding to preserve objects and provide historical and educational references to social customs, funding resources have since reduced, forcing them to become more commercial in their outlook and needing to charge higher fees (Markwell, Bennett & Ravenscroft, 1997; Kotler & Kotler, 1998:p.348; Falk, 2009a:p.244). Therefore, visitors are now an important commodity for their existence, or in the case of heritage sites, their upkeep (Morgan, 1996:p.19). Visitor expectations may also be raised with the amount they are required to pay, whether on entry or via membership, often researching reviews to judge what they may experience against what they are required to pay for their day out. For example, most of the low rated Trip Advisor reviews for the Kensington Palace case study interpretation mentioned the amount they had to pay was too expensive for what they experienced. In this instance, visitors' perceived value helped in forming a negative experience (Falk & Dierking, 2000:p.75).

As a consequence, it is important for heritage sites to understand visitors' perception of value to their visit, the quality of services and facilities provided, the breadth of the offer i.e. activities, events and differing forms of interpretation for engaging all members of the visiting group or individual (Black, 2005; Falk, 2009a). It is also important for heritage sites to market their offer as a distinctive, possibly unique, place to visit to compete with other nearby venues (Morgan, 1996:p.16; Kotler & Kotler, 2000a:p.282; Falk, 2009a:p.244). With well known 'brands' such as the National Trust and English Heritage, visitors become familiar with the type and quality of facilities that will be available; there is a formula for each of the organisation's properties, both physically and online. As a member of one of these organisations, visitors are sent offers and discounts through the year, to encourage repeat visits or to 'experience' a different property. A magazine

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[72] There are different types of heritage referred to as either 'cultural', 'natural' or 'built' (Poria, Butler & Airey, 2003). Museums are generally cultural, parks natural and architectural buildings as 'built'.

provides articles on renovation work being done, and/or new interpretations available at properties across the country, with possibly an inset pamphlet on local heritage properties. Marketing and the ability to do so, therefore, is an added, and vital, ingredient to the many roles and departments within a heritage organisation, or independent heritage sites such as Beaulieu.

Thirty to forty years ago, museum and heritage sites would have relied on government, local council or Tourist Centre staff for promoting and marketing the exhibitions and events (Markwell, Bennett & Ravenscroft, 1997; Howard, 2003; Falk, 2009a). Larger museums and heritage site organisations now include marketing and advertising departments (Kotler & Kotler, 2000a:p.286), although the smaller museums and heritage sites are still managing with one or two members of staff covering many roles with help from volunteers, such as King John's House in Romsey, Hampshire. It is much more difficult for the smaller properties/museums to capture prospective visitors, partly because of the lack of skilled staff, (Markwell, Bennett & Ravenscroft, 1997:p.96) but also because of the cost of marketing and advertising (similar to most small businesses). Web and social media platforms enable the ability to market to a wider audience, creating a level 'playing field' across varying sizes of museum and heritage sites, although the different sites and organisations still need to expand their skillset and/or staff to make the most of the new opportunities social media provides.

The advent of social media has also provided the ability to directly connect with visitors (Ciolfi, 2012b:p.73; Giaccardi, 2012a). Visitors can engage with the heritage site via Facebook, Instagram, Twitter, Flickr, YouTube and/or similar social media channels. Visitors are able to post reviews on social websites such as Trip Advisor after their visit. Measuring visitors' experiences by using Trip Advisor reviews, enables heritage sites/organisations to see areas visitors are satisfied with or those which could be improved. Traditional visitor surveys either completed at the end of a visit or post visit have been designed to capture information from which the heritage site can glean statistical data such as: demographic breakdown, analyses of behaviour, and attitudes that can be compared across different groups (Black, 2005; Falk, 2009a; Hashim, 2013; ALVA, 2013). Qualitative feedback can also be gleaned via comments about tangible resources/facilities and intangible aspects (Black, 2005; Falk, 2009a; Goodacre, 2013) such as the welcome received from visitor services staff, warmth and friendliness of the gardeners, or their overall enjoyment (see Fig.77).

Figure 77: National Trust Survey for Lacock Abbey Question 1, Section 2 of 6 Sections (National Trust, 2015b)

Motivation or reasons for visit are requested as part of the National Trust's online survey indicating this is important data in understanding why the visit has taken place. The National Trust specified the following to choose from, requesting selection of all that apply for the main reason(s) for their visit:

- 'To see/experience something or somewhere new
- To learning more about the place and its stories
- To develop an interest (e.g. gardening, pottery, etc.)
- To enjoy the beauty of the place
- To discover or explore the nature or wildlife
- To enjoy peace and tranquillity
- To spend time with friends and family
- To go for a walk
- To enjoy a seasonal event/exhibition (Bluebells, Easter Egg Hunt)
- To eat/drink and/or shop
- To make the best use of my/our membership
- None of the above'   (National Trust, 2015b)

The 2015 National Trust visitor experience survey was thirty-five web pages long with a few of the questions covering two pages, adding to this amount. Some of the pages were simply messages

stating what the next section covered. The questions above formed part of web page 6, question 3 of section 1; in section 3, question 1 (web page 18) asked a similar question with a similar range of responses to choose from:

> 'Please answer from the following list, which is the most important to you when looking for a day out?
> *Tick one answer only*
> - A relaxing social day out with friends and family
> - To see major attractions in the area
> - To learn something new or to pursue an interest
> - To experience fascinating, beautiful or awe-inspiring places
> - Food for the soul
> - To get an adrenalin buzz'   (National Trust, 2015b)

The web page consists of four questions, the first three are multiple choice i.e. directed questions with the fourth as an agree/disagree category which did not offer comment fields to be able to rationalise why the visitor agreed or disagreed:

> 'Do you agree or disagree with these statements?   Agree   Disagree
> - I would rather go shopping than visit a stately home or the countryside
> - The arts are important to me
> - What leisure time I have, I prioritise seeking out new experiences
> - Children find museums boring'   (National Trust, 2015b)

This set of questions would be difficult to answer, as the answer would not have been a clear decision between agree/disagree. It would depend on why the visitor was visiting and who with (Falk, 2016:p.368). It was also difficult to understand what importance the answers provided would have for the National Trust in understanding visitors' intention to visit. Adding a comment field would have allowed visitors to enter additional points and/or explain why they agreed or disagreed. The survey took twenty plus minutes to complete, which was more time than a visitor might want to spend without reward. Experiences of completing online surveys when they are short, perhaps five questions long, enable people to 'quickly' provide feedback, but when starting a survey, it is often not stated how many questions or how long it might take. What may have started with good intentions of providing feedback because the visitor had such a great (or not) experience, could leave the visitor feeling trapped in continuing and taking a longer amount of time than they had allowed, or cancelling out of the survey.

Completing a paper survey with a visitor services member of staff at the end of a visit may also be an imposition on time, resulting in short, blunt responses or a lack of responses. The point to this reflection on how visitors may feel in providing answers to end of visit and online surveys is to highlight how differently they may be completed because of time constraints, annoyance or other factors. Information gathered thus may not, therefore, be a true representation of their visit, which in turn, provides unreliable information for the heritage site, except perhaps for the demographic statistical information (Veverka, 1994; Black, 2005; Hashim, 2013:p.20).

The negative response to feedback and requests for feedback may be from a small percentage of visitors compared to visitors that like to engage with the heritage site and provide feedback that aims to improve future visits. Completing a survey enables them to have a 'voice', to talk about their visit and what they found to be positives, and negatives, in creating memories of their day. Capturing visitors' experiences, especially at the end of a visit from the heritage site's perspective can be extremely valuable. Visitors may be feeling content, happy and very willing to relay their experience whilst freshly remembered. Talking with a Front of House/Visitor Services Manager who may have stopped them to enquire about their visit, may draw out specific information about their experiences during the day. It is also an excellent opportunity for visitors to feel valued by the individual attention and concern about their visit. Their feedback and responses are valuable in that they can be used in conjunction with other feedback methods to provide focused improvements at the heritage site.

The Lego user experience map of an executive's journey to Lego, New York in Fig. 78, (Mears, 2013) demonstrates how at each point in the traveller's journey, before, during and after, his experience is denoted with a happy or unhappy face (positive or negative experiences). The diagram helps in understanding different touch points where the travel company can affect a difference to ensure a smiley face, therefore a satisfied customer or consumer (Mears, 2013). It could also be a good exercise for measuring a visitor's experience i.e. the amount of happy/unhappy faces at the different points of a visit.
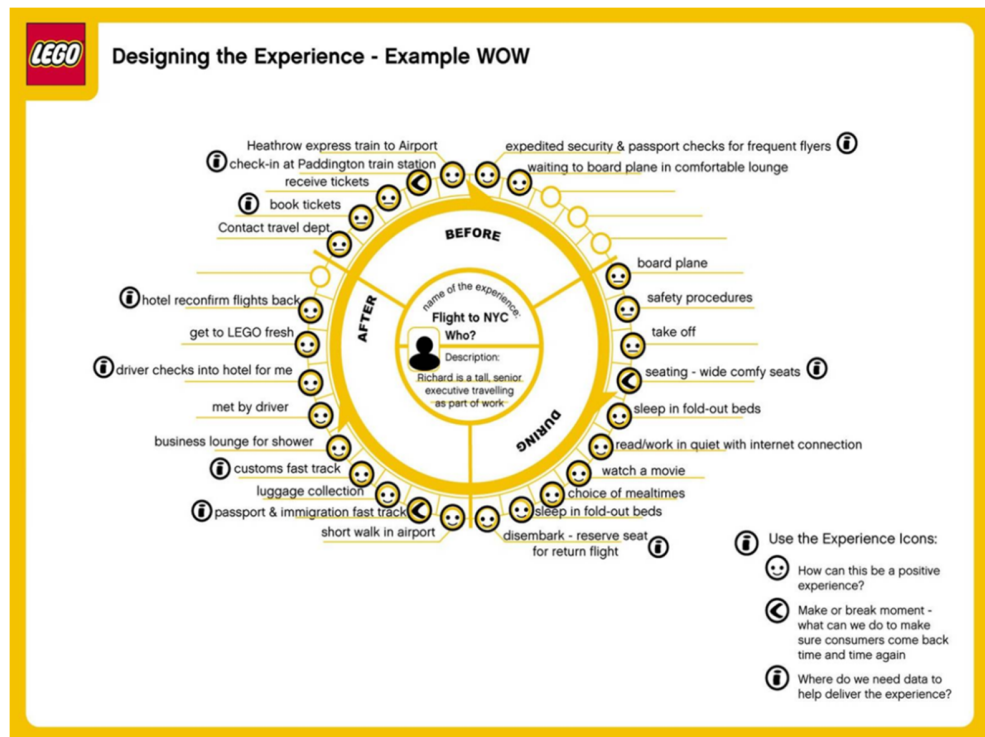
Figure 78: Lego's Designing the Experience (Mears, 2013)

Black (2005) describes a similar process which uses a range of evaluations including one named the 'Customer Journey' which product designers would also be familiar with. The process Black has termed 'Service Blueprinting', is a process that checks/analyses quality in the '*sequence of service elements experienced by a range of clients*' (Black, 2005:p.106). There are similarities of consideration when designing products and designing heritage interpretation to provide engaging experiences. The user becomes the visitor and how you design for them to engage with your product or heritage site for a successful experience should consider the following planning rules (Overbeeke *et al.*, 2003:p.11) which I have adapted (shown in non-italics, Fig.79) when planning for heritage site interpretation:

1. *Don't think products* **[tours/interpretation panels/activities]**, *think experiences: A design should offer the user* **[visitor]** *the freedom for building his or her experiences.*

2. *Don't think beauty in appearance, think beauty in interaction. The emphasis should shift from a beautiful appearance to beautiful interaction, of which beautiful appearance is a part.*

3. *Don't think ease of use* **[visit/flow/interaction with exhibits]**, *think enjoyment of the experience. Bringing together 'contexts for experience' and 'aesthetics of interaction' means that we do not strive for making a function as easy to access as possible, but for making the unlocking of the functionality contribute to the overall experience.*

4. *Don't think buttons, think rich actions. The goal is not differentiation for differentiation's sake, but the design of actions, which are in accordance with the purpose of a control.*

5. *Don't think labels, think expressiveness and identity. Designers should differentiate between controls* **[interpretation panels in different rooms/artefacts/tours]** *to make them look, sound and feel different. More importantly though, this differentiation should not be arbitrary. The 'formgiving' should express what purpose a product or control* **[artefact/exhibit/tours]** *serves.*

6. *Metaphor sucks. The usefulness of metaphor is overrated. The challenge here is to avoid the temptation of relying on metaphor and to create products* **[tours/interpretation panels/activities]**, *which have an identity of their own.*

7. *Don't hide, don't represent. Show. It is the designer's task to make physical hold-ons visible and make optimal use of them in the interaction process* **[touch, hold, 'feel' exhibits].**

8. *Don't think affordances, think irresistibles. People are not invited to act only because a design fits their physical measurements* **[visitor type i.e. age, educational level, expectations].** *They can also be attracted to act, even irresistibly so, through the expectation of beauty of interaction.*

9. *Hit me, touch me, and I know how you feel. If we design products, which invite rich actions, we can get an idea about the user's* **[visitor's]** *emotions by looking at these actions*

10. *Don't think thinking, just do doing. Handling physical objects and manipulating materials can allow one to be creative in ways that flow diagrams* **[interpretation panels, participatory activities and or tours/re-enactments]** *cannot. In the design of the physical, knowledge cannot replace skills. You can think and talk all you want, but in the end, the creation of contexts for experience, the enjoyment and the expressiveness require hands-on skills.*

Figure 79: Overbeake's Planning Rules Adapted for HSI design (Overbeeke et al., 2003:pp.11–13)

Sengers (2003) also suggests that to create engaging experiences designers should '*think of meaning, not information*' and '*instead of representing complexity, trigger it in the mind of the user*' (Sengers, 2003:p.27). Cited in Roberts (2014), '*Stoinksi, Allen, Bloomsmith, Fortman and Maple (2002) argue, 'in the end, no matter how skilful the exhibition makers, no matter how calculated or inspired their choices, the ultimate act of meaning making is idiosyncratic and*

belongs to the viewer' (Roberts, 2014:p.194), i.e. that visitors are individuals with a range of backgrounds, cultures and personal ways of viewing, doing and interpreting information.

Laws (1998) speaks of visitor satisfaction diaries for gaining information about visitors' experiences from their perspective, rather than that of the organisation via a '*modified service blueprint approach*' at Leeds Castle. In his article, he cites Walle (1997) who discussed the need facing tourism researchers to *'utilize diverse forms of evidence and information when the feelings of people are being studied' (p. 525),* noting that *'In order to deal with such phenomena, scholars and practitioners often employ intuitive and subjective evidence which is emic, not etic, in nature.'* (Walle cited in Laws, 1998:p.534). The visitor satisfaction diaries allowed visitors to provide an excellent insight to their experiences of Leeds Castle. The combined results of two diaries (see Fig.80) formed the basis of a semi-structured interview with Leeds Castle's Enterprises' Managing Director, in which he was also asked to provide rationales for each item (see Fig.78). The visitor diary comments highlight thoughts about the different aspects of a visit affecting their satisfaction, and therefore ultimately their experience. It is interesting to note how positive aspects became negatives because of having to wait too long, or too many people either in the way or making too much noise. Even though they said they enjoyed the visit, this became a negative because London was not signposted on exiting the Castle grounds (Laws, 1998:p.550). The negatives include aspects that may not be possible to change or improve, as demonstrated in Fig.81 with the Managing Director's responses. It is clear the heritage site has tried to facilitate a good ratio of staff to visitors and ensure there is a directed flow with guide books available to buy on entry (Laws, 1998:p.551), yet too many people visiting resulted in lost opportunities to speak to the guides creating a negative experience. When reviewing the comments with the National Trust survey questions, and similar other surveys, the factors that affect visitors' experiences seen here, are not those generally asked about in the surveys. Surveys, therefore, are perhaps the best way to gain statistical demographic break-down data, comparative data and feedback about organisational facilities and resources, but are they sufficient in being able to elicit information about visitors' experiences, particularly from the visitors' perspective? (Black, 2005:p.113; Falk, 2016:p.359).

	Account of experience	Effect on satisfaction
1	After parking, we walk towards the entrance to the Castle grounds, but a barrier across the roadway, and buildings to each side confuse us	−
2	We queue behind a school group for tickets, after a while a steward indicates another ticket counter for individuals	−
3	We wish to buy a film, the shop is crowded	−
4	The group of youngsters is now blocking the main entrance, and we feel concerned that we may be in for a noisy visit	−
5	The group waits for all members to pass the entrance, so we walk ahead quickly	+
6	The Castle comes into view across the lawn. The sun is shining and we are again glad that we decided to visit	+
7	As we get nearer, a dark cloud obscures the sun. We begin to wonder if we should go back to the car for our coats, but decide not to	−
8	The stonemason's plaque in the Barbican catches our attention, and we look more closely at the old walls	+
9	I want to take a photo of the castle framed by the archway, and have to wait while a long stream of people are walking through it	−
10	As we walk towards the Castle, two stewards jovially direct us away from what seems to be the main entrance	−
11	At first we feel disappointed, but rounding the corner we see to our delight the Gloriette rising from the lake. I cannot get far enough back to photograph it, having only brought a fixed focal length lens	+
12	A small group of people have congregated around a small doorway, wondering if that is the right way in to the Castle	−
13	We all enter, and would like to know more about the cellars and barrels, and why an old stairway was walled off	−
14	Everyone is delighted with the heraldry room. A couple are talking animatedly to one of the staff, asking about the Field of the Cloth of Gold. Another couple is asking about the hangings to be seen in the Queens bedroom	+
15	There are few visitors here, and we walk through the corridors and the first exhibits at our own pace	+
16	We catch up with a party of about a dozen people including some young children. They are noisy, and move very slowly	−
17	We enjoy viewing the living accommodation, but can't ask questions as the guide is occupied in talking in detail to other visitors	−
18	After leaving the Castle, we stroll to the restaurant and shops. There is a school group in the courtyard and the area is quite noisy	−
19	We are pleased with the visit, but concerned that London is not signposted at the first roundabout after we leave	−

Figure 80: Satisfaction Diary of a visit to Leeds Castle (Laws, 1998:p.550)

1. The approach to the Castle (points 2, 4, 6, 7, 11, in the visit diary, Table 2).
The Castle was opened to paying visitors in 1974, when Leeds Castle Foundation was established. At the outset, it was decided that views of the Castle and its lake, set in spacious lawns, were to be sacrosanct. From this, it followed that the car parks and most visitor amenities were located a considerable distance from the Castle. A notice is printed on entrance tickets, and the walk is well signposted, special transport is provided in the grounds for the elderly, or disabled. A duckery and attractive gardens were constructed to soften and enliven the walk, with strategically located benches. However, the use of wheelchairs inside the Castle itself is limited to three at any one time because of the many narrow staircases.

2. Signing (points 1, 2, 10, 12, 19 in the visit diary, Table 2).
Signs in the grounds are kept to a minimum and are presented in a consistent style, using red or grey lettering on a cream background. However, as people often fail to read the information provided, there is a need for staff to be available to talk to visitors. At Leeds Castle, the ideal is for visitors to see a member of staff at every turning point. All staff are encouraged to interact with visitors, but for some gardeners, this may be less easy. They are primarily employed for their trade skills, although some enjoy talking about their skills with visitors, who are often very interested in the carefully designed and tended gardens which are also home to the national collections of catmint and bergamot.
Leeds Castle has a higher staff to visitor ratio than most historic attractions, all contract staff are paid on one rate, £3.65 per hour in 1997, the rate is reviewed annually in September. There are about 200 part-time and casual staff, each working 2–3 days per week. A potential problem at the time this study was undertaken was the proposed introduction of a higher minimum wage, by the European Union. It was anticipated that this could result in higher entry charges.

3. Interpretation of Leeds Castle (points 8, 13, 14, 17 in the visit diary, Table 2).
There is very little signage within the Castle, as it is a policy that signs would intrude on the visitors' enjoyment of the building and its contents, giving visitors more the impression of a museum than a lived in house. During normal visiting hours, staff are stationed in each main room or area of the Castle and are expected to be proactive, responding to visitors' interests rather than reciting factual information by rote. This system enables people to move through the various parts of the Castle at a pace dictated by their own interests; some spend more time in the displays of the Heraldry room, others are more attracted by other areas such as the furnishings of the drawing room or the Thorpe Hall room. The Castle is regularly opened early for pre-booked coach parties and for special interest groups, and in these cases visitors are guided through the Castle by staff using their more specialized knowledge, and if required, in a foreign language.
The Leeds Castle guide book is now available in nine languages, as 50% of visitors are from overseas. One in seven visitors purchase a copy on entry at the ticket boxes, the large print run mean that it is profitable at £2.50 per copy: although £250 000 is tied up in three years' stock. The guide book is particularly useful when visiting the grounds where there are fewer staff, but also helps expand visitor enjoyment and understanding within the Castle.

4. Flow of visitors through the Castle (points 2, 9, 10, 11, 15, 16 in the visit diary, Table 2).
The structure of old buildings such as Leeds Castle is not ideal for large numbers of visitors, and it was essential that they all followed one route through the building. From the first day of opening the Castle to the public, it was decided that visitors would enter through the Norman cellars, thus gaining pleasure from the unique exterior view of the Gloriette (an ornate tower rising from a small island in the lake and connected to the main Castle by a corridor in a high stone arch). The visit then proceeds in chronological order through the Castle. Visitors have no choice but to follow the prescribed route through the Castle: unobtrusive rope barriers are placed to guide them.

Figure 81: Visitor Satisfaction Management Response (Laws, 1998:p.551)

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The relatively recent ability to provide reviews and feedback via Trip Advisor, Facebook and other social websites and media channels (Kempiak *et al.*, 2017:p.381) allows visitors to reflect on their visit experience in their own time i.e. when they are ready to (Giaccardi, 2012a:p.3). The time to reflect on their experience and talk about their day with family, friends, work colleagues may remind them of elements of their visit they had overlooked, or had not realised its effect until speaking about it with others (Falk & Dierking, 2000; Kirchberg & Tröndle, 2012:p.438). If they felt strongly about their experience, they may post feedback or a review, but it would be more considered, and volitional, rather than being directed to do so, under possible time constraints (Falk, 2009a). Would more 'considered' sharing of their experiences via reviews and feedback be more valuable as tools for measuring visitors' experiences than surveys? Are reviews and feedback trustworthy, creditable or useful? Would these concerns also apply to online surveys? The table by Malhotra, Nunan and Birks (2017) presented in Fig.82 suggests that providing a platform where 'Participants can express themselves in ways that they are comfortable with' (Malhotra, Nunan & Birks, 2017), is a strength in the use of social media for marketing research. Immediacy is also seen as a strength of social media feedback and reviews, supporting comments above with regards to visitors' possible time constraints at the end of their visit.

Table 17.1	The Relative Strengths and challenges of traditional marketing research and social media research methods	
	Strengths	**Challenges**
Traditional marketing research	Robust theoretical underpinnings to sampling, research methods and data analyses	Gaining access to participants – declining response rates
	Robust development of ethical codes of practice, especially in protecting participant anonymity	Complaints of boring research experiences
	Breadth of quantitative and qualitative research methods to measure and understand participants	Debates over the quality of samples used in survey work, particularly when access panels are used
	Focus upon specific existing or potential consumers to capture behavior, attitudes, emotions, aspirations and sensory experiences	The costs and time taken to conduct high-quality research relative to other forms of data that may support decision makers
Social media research	Can research target participants who would otherwise be very difficult to reach	Newly developed methods with little theoretical underpinning
	Engaging experiences; technology and context suited to participants	Representatives – can count incidences of behavior, but research tends to be qualitative
	Participants can express themselves in ways that they are comfortable with	Ethical challenges in maintaining participant anonymity
	Speed of capturing a great amount of disparate data	Inability to target specific types of participants and/or specific issues

Figure 82: The relative strengths and challenges of traditional marketing research and social media research methods (Malhotra, Nunan & Birks, 2017:p.495)

The table helps to explain there is no one method that will provide a 'correct' measurement or understanding of visitors; it is about using complimentary methods to gain the best insight.

There is considerable recent research about user-generated content (UGC) for tourism and travel, and the phenomenon of growth in consumer-to-consumer information search platforms such as Trip Advisor (Kotler, Bowen & Makens, 2010; Kang & Schuett, 2013; Li *et al.*, 2013; Hernández-Méndez, Muñoz-Leiva & Sánchez-Fernández, 2015). Why people leave reviews, rate reviews and feedback is not the main focus of this thesis, yet to understand the creditability and trustworthiness of the reviews, the 'why' is important. According to Kang (2013), by 2012 Trip Advisor posts had increased by 97.33% from 2005 to 75 million (Kang & Schuett, 2013:p.94) creating a strong, growing, social community of 'reviewers'. In becoming a Trip Advisor reviewer, that person would join an active community where their opinion (posts) may be valued by others to form a decision (Kang & Schuett, 2013:p.97). Because reviews are mostly written for the benefit of others i.e. potential visitors/travellers, it is normally expected or assumed that the reviewee is being honest about their experience(s). How would a reviewer know this is the case? There is much research about social influence theory that cannot be covered here (Liu, 2010; Giaccardi, 2012a; Tham, Croy & Mair, 2013; Kang & Schuett, 2013; Susarla, Oh & Tan, 2016; Malhotra, Nunan & Birks, 2017), which helps to identify how people's behaviour changes from social interaction with others, but to briefly answer this question, it is about an individual's need or desire to express opinion, provide benefit from personal experience and knowledge, and to be part of a participatory culture (Giaccardi, 2012a:p.3). For this to be accepted, and trusted by others, the reviewer would need to ensure the reviewees posted 'honest' opinions over a period of time, receiving 'likes' or comments that supported their opinion. Reviewers would read their post, and then track what other people may have said; they may also review the reviewee's 'status' i.e. how many times they may have posted and whether these are also supported by others. In checking people's reviews, their status or rating, how many times they posted and whether they always posted positively or negatively, will build trust in that reviewee. Posts that are always positive/negative could persuade looking elsewhere or to other reviewees; logic being that not every visit/trip can be free of negatives or positives.

There is then the consideration of the type of person that posts content and those who like completing surveys or being interviewed. There are certain types of people that enjoy taking part in different communities, volunteering, contributing and making a difference (Kang & Schuett, 2013:p.95). Being part of an online community and therefore contributing their opinions,

knowledge and experience via social media broadens their reach to a wider set of communities, physical and virtual (Kang & Schuett, 2013:p.98). Others may enjoy the gamification element of how many likes they might receive for the posts they provide; the acknowledgement that they have said something that others also agree with or like, may not mean as much as the amount of 'pings' or likes they receive. There are also those that like to categorise what their interests are as travellers or visitors. Trip Advisor makes this straightforward with their different 'tags'. By choosing tags, they 'advertise' their interests or what they would like to be considered by way of specialism(s) for those that may read their reviews. From the heritage site's perspectives, the tags could be valuable in discovering demographic data about their visitors and, therefore, able to compare with other forms of visitor research methods. Bearing the above in mind, and the growth in communities sharing their experiences, it would be reasonable to assume user-generated content, in the forms of reviews and social media feedback, is generally trustworthy information. How creditworthy will still depend on the reviewers' opinion of the reviewee.

To ensure the reviews are positive, HSI planners and designers have an unenviable task of trying to please people all of the time for positive experiences to be formed. Ways in which this might be achieved in part have been discussed in sections 2.1.1 and 2.1.2. In addition, audience advocacy enables museums and heritage sites to facilitate understanding of visitors' needs, wants and expectations at each stage of the planning and design/development process, (Burch, 2013; Hashim, 2013) not just interpretation per se, but resources, rest areas and activities. An audience advocate may be assigned to individual teams or projects as an independent advisor, strategist, communicator between stakeholders and project teams, assessor and/or trainer. Pine & Gilmore (1999) would possibly rephrase the term 'audience advocates' as 'collaborative customizers' in a retail environment. They describe collaborative customizing as '*a process by which a company interacts directly with customers to determine what they need and then produces it for them'* (Pine II & Gilmore, 1999:p.87). A 'collaborative customizer' would, therefore, need to have negotiating/sales skills, knowledge of the product, what level of customisation it may have, good listening and communication skills, an understanding of the consumer's needs and wants (empathy), and be able to customise the product/offer until it reaches a level of satisfaction for the consumer. In this sense, Audience Advocates are collaborators between the company/organisation and the consumers/visitors. Training provided by Advocates may be to simply remind the team members what it is to be a visitor; being immersed in a heritage site i.e. seeing it daily, it may be difficult to view with fresh eyes and experience what different visitors of

different ages may experience for the first time (Burch, 2013; Hashim, 2013). Visitor guides can form another type of audience/visitor advocate, providing qualitative data (verbal feedback from conversations with visitors) which may help to validate other forms of visitor research data in developing existing and new interpretations at a heritage site.

Ciolfi (2012b) describes using active participation and collaboration with a range of different stakeholders, including visitors, at four quite different sites[73] '*different voices surrounding heritage [could] be heard: curators, visitors, volunteers, but also other stakeholders and wider communities of interest*' (Ciolfi, 2012b:p.83). She explains it was important to highlight the spontaneous connections formed between guides and visitors which may not occur with more formal members of staff such as management, and how inspirational the guides were in the concept and design process (Ciolfi, 2012b:p.79), supporting the idea of including visitors within a design process i.e. visitor centred design. Each project comprised '*complex social relationships*' and were '*influenced by different objectives, goals and constraints*' (Ciolfi, 2012b:p.78) demonstrating how by being inclusive, listening and understanding, collaboration, co-ordination and negotiation, the projects were successful.

This section has reviewed literature on how heritage sites' visitors' experiences are traditionally measured and whether visitors' voluntary feedback via social media channels and reviews is growing to be more relevant than surveys when planning new interpretations. Although heritage organisations, tourism and academics generally make use of surveys to collect data about visitors' experiences at heritage sites, the information required has mostly been to fulfil statistical evidence for organisational and funding stakeholders when it could also be used to understand the visitors' views of the interpretations' part in their heritage site experience. Comment cards, visitor books and word of mouth (visitor services and volunteers/guides) enable visitors to leave feedback whilst visiting, and help considerably in gaining insights to their visit experience, providing insights that surveys cannot (Schwager & Meyer, 2007:p.11). The development of social media channels and platforms has enabled visitors to provide feedback as and when they wish, and say what they wish without direction from the organisation involved, during their visit or post visit. Feedback from the latter is generally more considered, reflected upon and from the visitors' perspective and not the

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[73] Interaction Design Centre, Limerick case studies ranging from 2001 to 2010 involved four different sites: The Hunt Museum, Limerick, Shannon International Airport, Co. Clare, The Milk Market, Limerick City and Bunratty Folk Park, Co. Clare. (Ciolfi, 2012b)

organisation's, providing a valuable insight to what has provided them with a successful (or not) visitor experience.

Whether reviews can be trusted was explored in research from Travel and Tourism journals, and Electronic Commerce journals which highlighted the importance of online communities and social influence theories. Further research would be necessary to fully understand the psychology and behavioural aspects of online communities, specifically with regards to credibility and trust, but for this thesis, the suggestion is reviews provided by visitors can be considered as reliable as the information provided through online surveys. With a growing participatory culture, reviews on social websites such as Trip Advisor and the plethora of social media channels will become more important as a valuable insight to visitor and consumer experiences.

Consideration of how visitors are represented throughout the planning process has also been explored through the use of audience advocates, visitor services, guides and volunteers. Although audience advocates are fundamental in some of the larger museums, they are not often available as a resource for smaller museums and heritage sites. The inclusion and involvement of the local community and volunteers would be a good consideration for the smaller heritage sites, and generally this occurs (Claisse, 2018). It is the larger organisations and sites that have distinct roles and departments where this does not seem to occur as frequently.

Heritage site interpretation experiences still appear to be generally viewed from an organisational perspective, rather than the visitors' perspective. For example, a commercial perspective, as opposed to a 'day-out/leisure/family-time/memory-making/meaning-making' experience from the visitors' perspective. The most successful experiences seem to be when there is collaboration and involvement of all parties involved, including stakeholders, volunteers, visitors and communities, throughout the process.

SUMMARY

The critical review and analysis of literature documenting extant theories and design processes undertaken in section 2.3, has confirmed there is a need for development of a new model for designing heritage site interpretation. The development of the model needs to ensure clarity of the teams i.e. who should be included, their roles, experiences, skills and tasks, constancy of team members, and the importance of collaboration and communication across the team. This section's three sub sections individually highlight collaboration and inclusion as major components of a successful heritage site interpretation design team. The new model that has been developed from this thesis, and practice, is presented in section 4.2 and explains the distinctive roles, processes and interactions required for crafting engaging heritage site interpretation experiences for visitors, developed further from Chapter 3's analysis of primary data.

Many of the issues raised pointed to a need to understand visitors, their motivation for visit, who they are and why some visit and others do not. Surveys produce statistical demographic data but not a complete insight to visitors' experiences. Designers generally fulfil briefs, whether provided by the heritage organisation or sub contracted. Their measure of success and the heritage organisation's view would appear to be how well they fulfilled the brief, not necessarily how well the visitors engaged with the outcome, or the impact made on their visit experience.

This has begun to change. There are many museums and heritage sites that are much more 'visitor-centred' and participatory, with interpretations designed to engage a wider range of visitors for longer with more comfortable facilities to enable them to relax and enjoy their day out (Black, 2005:p.190; Simon, 2010) helping to provide a fulfilling visitor experience. Museums, in particular, are providing participative projects encouraging visitors to create content collaboratively with the museum, becoming a platform provider rather than a content provider as shown in Simon's (2010) illustration (Fig.83).

TRADITIONAL INSTITUTION   PARTICIPATORY INSTITUTION

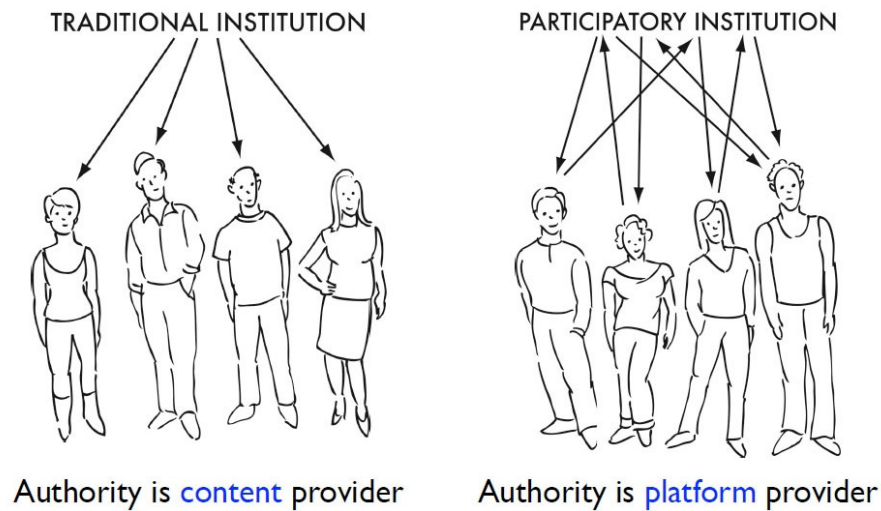Authority is content provider   Authority is platform provider

Figure 83: The Participatory Museum (Simon, 2010 cited in Weaver, 2010)

There is also considerable interest and growth in UX design within the design industries, of which UCD is a key component. The design focus on the user's experience echoes that of the visitor centred experience focus by museums, heritage organisations, and the marketing industry for the consumer's experience, (and now Universities with their students).

There has been, and still is, a growing amount of research in how to design and provide users/visitors/consumers with engaging experiences, but as stated by Hassenzahl (2003):

> 'There is no guarantee that users will actually perceive and appreciate the product the way designers wanted it to be perceived and appreciated' (Hassenzahl, 2003:p.33).

This can be taken further by applying to curators, professional services, educators, craftspeople, stakeholders, i.e. the team involved in planning and producing heritage interpretation[74]. If it is not possible to guarantee how visitors will perceive, receive and appreciate the interpretation (including all elements on offer at the heritage site), how is it possible to measure their impact, i.e. how they are received by visitors? (Falk, 2009a:p.248) Attempting to engage with all visitors is most probably impossible (Pine II & Gilmore, 1999:p.12; Kotler & Kotler, 2000b:p.287).

In an attempt to gain an understanding of visitors' views, perceptions and opinions, research has shown a mix of comment cards, user satisfaction evaluations, reviews and feedback via social

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[74] I would also add all professions from architecture to web/app/game design; any service where there are users, consumers and visitors.

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media channels which would seem to be preferable tools from a visitor's perspective to share/ provide information about their experience(s). These are items, along with observations (including Laws' (1998) visitor satisfaction diaries and user satisfaction evaluations (Black, 2005) and discussions held with guides or visitor services staff, which are not easy to measure if needing to provide statistical data for stakeholders/funders. They are, though, a rich insight to the variables that may form good and bad visitors' experiences. There are a variety of methods and resources available to build an understanding or insight to different demographics and personalities for heritage organisations. The broad range available does not appear to be used widely, yet. Having an understanding of the many differences people present in their needs and wants, provided via volitional personal feedback data, would help considerably in designing 'satisfying' and therefore successful experiences. Yet, as Hassenzahl's quote above, will what has been designed be appreciated in the way it was intended?

Section 2.3 has shown what may also be needed is a knowledgeable, dedicated, consistent, collaborative, cross-disciplined team, experienced in working and communicating with other professionals and non-professionals who have a range of skills, backgrounds and reasons for being involved. As a team member, it would be fundamentally important they view their team role as a priority, i.e. attend each meeting and respond promptly to communication. A practical knowledge and use of a UX/UCD process would appear to be relevant for designing HSI, placing visitors at the core of all considerations. Involving visitors (and their experiences) or visitor advocates (i.e. guides) through the design and planning of interpretation at heritage sites may help in ensuring the style and level of interpretation is relevant to the typical visitor base and the extended base the heritage sites aim to reach.