



organisations. The interviews with the Beaulieu team highlighted several positive working practices that have been incorporated into a new HSI design process.

The section also discusses a lack of visitors involved as a core part of the planning and interpretation design process evidenced by the analysis of existing theory and practice in Chapter 2. The case studies' research results highlighted that the use of a UCD approach did not occur frequently in the interpretation design process used by design agencies/companies. Considering the importance in understanding visitors and their experiences for shaping heritage interpretation, the chapter proposes a new model. The new model includes three teams: the curatorial team, the design team and a visitors' team, and is explained in more detail in Chapter 4, section 4.2.

### 3.1.1. PRACTICE ELEMENT AND THESIS

#### 3.1.1.1. PRACTICE: CRAFTING & IMPLEMENTING THE INTERPRETATION (CYCLE 1)

This section evaluates the results of the analysis regarding the design process for the Beaulieu kiosk interpretation and the organisational processes used at Beaulieu. The data set analysed for this section is primarily that of the interviews with the four core members of the Beaulieu Team:

Participant	Interview Date	Role
<b>Beaulieu Team</b>		
Mary Montague Scott	Friday 1 <sup>st</sup> March 2013	Owner/Director, Designer & Curator, Beaulieu Enterprises
Stephen Munn	Thursday 18 <sup>th</sup> July 2013	Commercial Director, Beaulieu Enterprises
Susan Tomkins	Wednesday 10 <sup>th</sup> July 2013	Archivist & Learning Interpretation Adviser/Curator, Beaulieu Enterprises
Jon Tee	Wednesday 3 <sup>rd</sup> July 2013	Visitor Services Manager, Beaulieu Enterprises
<b>Designers</b>		
Rebecca Furse	Friday 6 <sup>th</sup> Sept 2013	Design Assistant for Beaulieu Application & Senior Designer, RKA Architects
Russell Richards	Wednesday 3 <sup>rd</sup> July 2013	Senior Lecturer & Designer, Southampton Solent University
Katya O'Grady	Tuesday 8 <sup>th</sup> Oct 2013	Fine Artist/Designer
Alex Hoare	Thursday 18 <sup>th</sup> July 2013	Glass Designer for Museum Installations
<b>Launch Guests</b>		
Very Rev'd James Atwell	Wednesday 13 <sup>th</sup> Nov 2013	Dean of Winchester Cathedral
Rupert Thomson	Friday 25 <sup>th</sup> Oct 2013	Publisher & Set Squared Mentor
John Pemberton	Tuesday 1 <sup>st</sup> Oct 2013	Software Consultant & SEEDA Mentor
Dr John Richardson	Wednesday 14 <sup>th</sup> May 2014	Blue Planet Innovation, Senior Lecturer, University of Winchester and iNetProject Manager
<b>Additional Heritage Professionals</b>		
Ruth Taylor	Monday 23 <sup>rd</sup> July 2013	Freelance Learning, interpretation and engagement consultant (formerly at National Trust HQ as Learning & Engagement Manager)
Andy Lane	Monday 8 <sup>th</sup> July 2013	Marketing Manager, INTECH (previously Marketing Manager at Beaulieu Enterprises)

Figure 84: Interview Participants

Reflection of personal practice developing the Beaulieu Abbey kiosk interpretation, was a primary instigator for embarking on further research regarding design processes for this thesis. Not

involving visitors in the planning process was a concern which led to wanting to know if this was the general scenario in heritage site interpretation design.

Through the interviews with the Beaulieu team, I came to understand that their planning structure for interpretation at the Abbey, Palace House and Bucklers Hard was different from that of the National Motor Museum. A separate independent charitable trust runs the National Motor Museum: 'National Motor Museum Trust', consisting of various stakeholders, Beaulieu management team and family members. The Trust employs a team of professionals and a team within the Museum consisting of researchers and curators. During an interview on 1<sup>st</sup> March 2013, M. Montagu-Scott, she stated that for a redesign within the National Motor Museum, a professional museum designer would be employed. Interpretation for the Abbey, Palace House and Bucklers' Hard is under a separate remit and therefore team, which consists primarily of Mary Montagu Scott (stakeholder, project manager and designer) and Susan Tomkins (archivist, educationalist and researcher) with an in-house design team. Permissions are still required, from the Beaulieu Management team and different specialist organisations for areas such as scheduled monument consent for landscaping changes, but it is a more flexible team with access to quick decision making.

An aspect that helped considerably in the flexibility and quick decision making is the experience, and knowledge Montagu Scott has of the site. With Beaulieu as her family home, the memories and experiences of growing up at Beaulieu and the changes her father made, combined with her experience as a designer (theatre, set and costume design, interior, exhibition and museum design) has provided the team with a unique insight and practical understanding for designing interpretation at Beaulieu. In the interview held on the 1<sup>st</sup> March 2013, with M. Montagu-Scott, she stated:

*'it is unusual here at Beaulieu that I have that privilege really because being able to be able to work right across from the design side and in the sort of archive side and research side'. (M.Montagu-Scott 2013, interview 1<sup>st</sup> March).*

Although this can also have its problems as highlighted in her following statement:

*'if someone comes in from outside to a new subject you will draw out of it the strands that are really key. Whereas I will be over burdened by my knowledge, my historical context. So doing anything here, I have a lot of baggage in my mind of how things were*

*in the past perhaps, yes, I suppose that's one disadvantage, you don't come at it afresh.'*  
(M.Montagu-Scott 2013, interview 1<sup>st</sup> March).

One aspect Montagu Scott mentions is the acknowledgement that by working with an internal team as opposed to bringing in a professional designer, the team is working with possible pre-existing biases in how they may choose and represent information. An external professional may not only view the site with fresh eyes but possibly bring with them their own biases, or filter information in a different way. This is supported by the literature review, particularly in section 2.3.2 Assumptions in the Design of Heritage Interpretation and the area of project briefs where theatre designers, Coney, explain the difference in designing for heritage interpretation, yet brought 'theatre' to the interpretation designed for Kensington Palace. Additionally, the assumptions a broad brief may provide in content and delivery by a contracted design team.

Unusually, the Beaulieu Abbey kiosk interpretation was not steered by a brief coming from Beaulieu, but from a brief presented to Beaulieu, which I developed further in the process of writing a funding application for the project. I say 'unusually' because Montagu Scott usually writes the briefs for the different exhibitions and landscaping changes at Beaulieu as explained in the interview with M. Montagu-Scott:

*'I've written the architects' brief, researched the architects, so I do that as my stakeholder hat really and I will definitely be writing the brief for the architects and I've written designer briefs.... in the past when we've interviewed ten design companies for the Motor Museum, it was one of the most satisfactory things when we interviewed all these design companies, they all walked in the door and said 'that's one of the best briefs we've ever had.' I smiled at our managing director who was with me and because I'd written this brief and he'd helped me, between us we felt that we really knew what we were after and it helps to refine the process and make it easy for everyone.'* (M. Montagu Scott 2013, interview 1<sup>st</sup> March)

The project was, therefore, unique, not just in the circumstances of the Beaulieu Team I was working with, but also the relative freedom of creating a brief from the basic premise of a virtual flythrough of the 3D abbey and abbey site. In the review of three case studies, the closest experience regarding freedom provided by a brief was that of Coney with the Kensington Palace (HRP) staff. Having a defined brief is a standard design process (Read & Bohemia, 2011:p.1; Jones & Askland, 2012:p.1; Tjell & Bosch-Sijtsema, 2015:p.3) allowing structure, management of time

and costs, and a measure of what has been completed, when and by whom. This applies to all of the design disciplines, with the completion of the brief often being the only measure of success.

Working closely with Tomkins, it was clear she was extremely knowledgeable about the visitor types the kiosk needed to attract, which helped considerably in mapping out the content for the application. When interviewed on the 18<sup>th</sup> July 2013, S. Munn also stated:

*'different people will consume the information in different ways. There are some people who will not go up to a guide, electronic is the perfect medium for them because they can find out what they want, when they want it, without interaction, which they don't seek with real people. There are others who will want the real person there' (S. Munn 2013, interview 18<sup>th</sup> July).*

One of the most interesting outcomes from each set of interviews was that for the participants it was important to layer information, i.e. a headliner with brief information (one to two sentences), followed by more detail and context in a smaller font (a paragraph or two) and then a link for further information. This form of layering is commonly used in magazines, newspapers and websites, allowing readers to choose how much information they wish to absorb (Harper, 1998). For the Beaulieu Abbey kiosk interpretation, the KubeMatrix navigation device provides a similar form of layering for accessing varying depths of information (see Chapter 1, section 1.3, Fig.24). The device also allows layers for choosing different time slices of the heritage site's architectural history, and for choice and level of content, i.e. accessing material suitable for children, adults or professionals/academics/'history buffs'<sup>75</sup>. A range of varied material at different levels is not possible at the majority of heritage sites, other than through the use of an application or website. During the interview conducted on 1<sup>st</sup> March 2013, M. Montagu Scott stated:

*'quite a lot of museums you visit now that have been recently done are quite dumbed down. They've reduced text to the minimum, it's all based on a child's level of thinking and understanding and actually, that's quite unsatisfactory for quite a large percentage of visitors, particularly for something like the abbey or Buckler's Hard because they are quite mature things' (M. Montagu Scott 2013, interview 1<sup>st</sup> March).*

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<sup>75</sup> History Buffs are on of Trip Advisor's categorisation for its members' self-profiling (Trip Advisor, 2017)

Personal experience and experiences related in the interviews and feedback suggest information/interpretation panels are generally too brief or do not provide relevant information for the different age groups or interests. By using a mobile device application, this issue would have been eased. Unfortunately, as mentioned in section 1.3.1, the mobile devices available in 2008-2010 were not powerful enough to store or play back the rich multimedia Flash content.

As a kiosk interpretation, there was a possibility that a percentage of visitors would dwell too long, or create a blockage, i.e. visitors watching other visitors using the kiosk. Keeping the flow of visitors moving was a concern of the kiosk. During an interview with Munn and Montagu Scott (2013) they commented on the importance of flow, and the value of layers of information which could be accessible before or after a visit:

*'in an ideal world, there is a mound of information which they can get in layers. I wouldn't want to advocate you stick one page up there, so to speak, it needs to be multi-layered. However, having said that, depending on where it is and what it is about, from an operator's point of view, you don't necessarily want all the information, because someone could stay there for an hour and you've got a whole queue behind you of people who also want to access that, so that gives you operational problems' (S. Munn 2013, interview 18<sup>th</sup> July)*

*'you need to layer your information if possible so that you still provide that specialist knowledge in some form, but it's not always easy' (M. Montague Scott 2013, interview 1<sup>st</sup> March).*

The kiosk interpretation consists of layers in two contexts: level and choice, although the adult and academic levels were not available. The amount of work required to fulfil the three levels of content was too much for the timescale of the funded project. From the comments made by the designers and the launch guests, the additional content would still be valuable to add to the Beaulieu interpretation. Choice in information/content and how it is accessed has proven to be a 'would be good' aspect visitors would like to see in place at heritage sites. When interviewed on 14<sup>th</sup> May 2014, Launch Guest, John Richardson (commented:

*'people are saying oh this adds value, this makes my visit better, this makes it more of an experience, more memorable, or I come back in a year's time, and because there's new information on that system I get a different experience, so it's worth coming back. And*

*that's kind of a reason of well should we go round the house again? ... if I went back to one of these castles every year and either used my own device or one of their devices I wouldn't just get the audio which costs quite a bit to go round, I'd be going like this with my [mobile] and seeing it in 1942 when the army were in there or in 1710 when it was being knocked down for... And every year there might be a new thing added, so I haven't seen it, I haven't seen this time zone... you know, go back to 1200, and there'd be loads of trees and a few ducks' (J. Richardson 2014, interview 14<sup>th</sup> May).*

Richardson references the ability to choose a time-slice to explore within the Beaulieu kiosk interpretation in his comment above. The Beaulieu Abbey Kiosk interpretation provides visitors with three time-slice choices to explore: when the abbey was being built, its heyday and the time of dissolution. A choice of nine characters ranging from King John and Queen Eleanor to a novice monk would then provide you with a tour of that time. The majority of built heritage sites stage their building in a single period of time for their primary interpretation theme (Taylor, 2006b). The period of time often relates to a significant period of time such as Bolsover's 17<sup>th</sup> century heyday when there was a royal visit (Ptolemy Dean Architects, 2013; English Heritage, 2013), or relates to a period best-known by the community forming a Statement of Significance (Taylor, 2006b; National Trust, 2014). In the case studies, there would be one tour either by a character of the time (ATS Heritage, 2015), or a standard modern-day narrator. Being able to choose a range of content with stories/tours told by a range of characters over a choice of time periods provides choice that 'would be good' on a platform that visitors can use onsite or offsite. It also made learning about the site and the characters engaging, which is important in the creation of memories and therefore experience. The Very Rev'd Atwell was one of the Launch Guest interview participants and during his interview conducted on 13<sup>th</sup> November 2013, he describes his experience of the kiosk interpretation:

*'What I was excited about was here you were using modern technology, as it were, at its best to interpret and give people [choice]. I can remember when you could do a tour of the abbey and you could get someone to take you round, and get King John and whatever. Actually, I thought it was very clever to have King John taking you round; was brilliant. You were absorbing bits of information about King John, without realising it. And I felt wow, this was really interesting, really engaging and you were picking up this information almost effortlessly. You didn't realise you were learning. I think that was brilliant and it brought to life, again King John not just being a date and Magna Carta*



*and whatever. And a sense of his excitement in what he was about to build and this is rather a French style; this isn't English, this isn't sturdy enough, all those continental ideas coming across, which will give them a sense of how culturally united we were with Europe in those days.'* (Rev'd J. Atwell 2013, interviewed 13th November)

The Launch Guests' feedback has suggested they would like to know more regarding certain aspects of either the history of the building or the inhabitants. Heritage organisations are not always able to provide the level of choice visitors may like. A plethora of interpretation panels can mar the look, feel and ambience of a site (M. Montagu Scott 2013, interview 1<sup>st</sup> March). Panels are limited in the amount of information they can convey, therefore 'stories' are chosen carefully to ensure the limited word count still communicates the premise of the story (S. Tomkins 2013, interview, 10<sup>th</sup> July). The Beaulieu team are aware of the need to provide what visitors will find interesting (S. Munn 2013, interview 18<sup>th</sup> July) and in 2006, could see the Beaulieu Abbey 3D 'fly-through' would appeal to visitors in terms of providing an additional resource by visualising the size of the abbey as it once was. Each of the Beaulieu team emphasises that it is difficult for visitors to understand the sheer scale of the abbey. Therefore it was particularly pleasing to see Tomkins' positive reaction to the first visuals showing the interior of the abbey nave with monks sat on the pews.

### 3.1.1.2. LAUNCH: CURATING THE LAUNCH EVENT (CYCLE 2)

This section evaluates the results of the planning and execution of the launch event, observations of guests using the kiosk interpretation at the event, and analysis of the launch speech by Montagu Scott<sup>76</sup>. The planning of the event was organised between Beaulieu, myself as owner/director of The Talking Walls Ltd and three MA Marketing students from Southampton Solent University. The students had elected the Beaulieu Abbey Launch project as part of their client based module, working with 'The Talking Walls' to plan the event. Beaulieu's Public Relations and Catering departments were in charge of the Beaulieu side and the services required on the day.

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<sup>76</sup> The launch speech provided details of why, how and who were involved in the development of the kiosk interpretation, from the Beaulieu stakeholder perspective, and their view of the interpretation in answering the brief. The inclusion was pertinent in understanding how heritage site interpretation may be measured by stakeholders.

The event was received well, although feedback from Solent University's MA Marketing students' surveys highlights a disappointment that the application was not available on the PDA's loaned by Wild Knowledge<sup>77</sup> (Participants 1, 4 and 14). Unfortunately, the PDAs did not have enough onboard storage to run the Flash-based application, which was only realised the day before the event. Suggestions were also made about having more than one kiosk, with Participant 17 stating:

*'waiting to use - would also need lots of time to fully appreciate use of application, not good when people are waiting to use, puts pressure on ...'* (Participant 17, 2010)

There was a queue to use the kiosk after the speeches and demonstration, although had the mobile devices worked, the queue would have been eased. The 'queue' also supported Munn's and Montagu Scott's concern about flow.

The queue demonstrated that the launch guests wanted to interact with the application and discover how the abbey used to look, the abbey's characters and tours. The verbal feedback and surveys demonstrated these were the most popular choices in engaging with the application with Participant 7 commenting:

*'the different characters/perspectives on history/brings it to life. I love the walkthroughs and tours. 3D views and videos of Abbey itself an incredible 3D resource.'* (Participant 17, 2010)

On reflection, the placement of the kiosk could have been better positioned, allowing people to use the interpretation application without causing disruption to the flow of people visiting the Abbey museum, perhaps at the end of the exhibition (Economou, 2007:p.5). The two screened kiosk had been considered to enable others to watch the taller, large screen, whilst other visitors engaged with the content, and therefore the visitors watching becoming more of an audience rather than engaging and interacting with the content (vom Lehn & Heath, 2005). In my observations, this worked well for the younger members of the visitor group to explore whilst the members not so keen to engage with the technology could watch. The sharing of participation and multiple display screen kiosk form two of 5 'design sensitivities' recommended by vom Lehn and Heath (2005)<sup>78</sup> for the use of interpretation technology within museums. Ideally, more than one

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<sup>77</sup> Wild Knowledge was a spin out company from Oxford Brookes with a mobile device (PDAs) application for identifying wildlife set up in 2006. Neil Bailey and Stuart Thompson kindly offered the use of their PDAs for the mobile version of the kiosk interpretation after a connection with them was made via Steve Davis of the South East England Development Agency, Chilworth.

<sup>78</sup> The 5 recommended design sensitivities are: 1. Portable technology that is not tied to an individual user, but designed to facilitate sharing between multiple visitors may be preferential. 2. Display technology may be used that allows for multi-party participation and facilitate overhearing and co-participation. 3. Screens that deliver information to be viewed or read should allow multiple

kiosk would have been beneficial; one in the visitor entrance as well as in the Abbey museum, and possibly also in a quiet area with seating, which would have enabled visitors to dwell and not feel they are in the way.

The ability to choose from the range of content was very well received at the event, with several of the participants remarking that having this choice was ‘enlightening,’ ‘educational fun,’ ‘encountering a real character of history’ and being ‘able to see the rooms as they were’ (Participants 1, 7, 9, 10, 12, 14, 16). Choice is supported by the secondary research (Copeland, 2006; Soren, 2009; Hems & Blockley, 2006; Black, 2005; Veverka, 2000) to provide ‘opportunities to interact and construct their own meanings’ (Black, 2005:p.140). My wish in designing The Talking Walls’ application for Dunster Castle, and subsequently the Beaulieu Abbey application, was to enable a choice of information and platform as a visitor to a heritage site, having felt frustrated by heritage site interpretations in the past. The positive feedback regarding this aspect was therefore pleasing and encouraging. The negative aspect was that the only level of choice available for the launch was that of an 11-13yr old child as described in Section 3.1.1. For ‘Q3- Briefly describe any disappointing experiences in the use of the application’ of the event feedback survey, the comments were generally about the lack of the other two levels being available and the simplistic tone of voice:

*‘would like to see the history explained at different levels of understanding - children, adults with limited historic knowledge, adults with reasonable grasp of historical background. The narrative at points could appear a bit simplistic’ (Participant 12, 2010)*

Subsequently, a recommendation would be to complete the application at each level and re-evaluate with Beaulieu Abbey visitors and the Beaulieu Team. Participant 12 also suggested that for the more advanced levels, links to historical events with more in-depth information and facts about why an event happened could be built in, for building a deeper understanding of context. This is an interesting insight to the type of information visitors may want to explore at the academic level and reinforces the need to supply layers of information for the different types of visitors (Black, 2005:p.206).

Also of value for feeding into the revised version, are the varied suggestions for usability and navigation improvements such as integrating voice interaction (Participant 11), being able to

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people to view it from different angles. 4. The structure of the content may encourage visitors to view the exhibit at certain points and thus facilitate the interweaving of information from the device with the exhibit itself. 5. The content may be designed to stimulate comments and discussion about the original exhibit (vom Lehn & Heath, 2005:pp.15–16)

interact with different parts of the building by touching the screen (Participant 6) and providing visible labels to the KubeMatrix navigation 'cubes' (Participants 1 & 5). Feedback regarding the usability of the interface navigation system, the KubeMatrix, has a mixed response with most survey participants commenting that it worked well, but there were a couple of participants who found it difficult or complicated. The system was designed for mobile first and extended to each side of the screen for desktop/web-based platforms. It was, therefore, a shame that the mobile version was not working on the PDAs for the Launch Guests to use and have an opportunity to understand the premise of the KubeMatrix navigation.

#### Launch Speeches:

The first speech introducing the Launch Event and the Beaulieu Abbey kiosk interpretation was performed by Mary Montagu Scott, with her father Lord Montagu accompanying her.<sup>79</sup> In preparation for the event, I had met with Montagu Scott to run through what the speech would include, what she would say and what I would say in my speech. Nonetheless, on the day, I was surprised by the positivity of her feedback regarding the project, myself and the application. In the introduction, Montagu Scott explained the collaborative nature of the project:

*'We were very excited by this project and thought it would be a great idea and we then, or she then started to look to secure funding for this project to work with them and delighted to say that SEEDA, the South East England Development Agency, came in as a major partner, and the Business Link South East were also great partners in this project, supporting her financially to develop this, then with Southampton Solent University and the University of Winchester, so we had many partners in this project. It is a great example of a partnership working, and together with our archives at Beaulieu, and our archivist Susan Tomkins, she started to work on this, putting together a story of the history of Beaulieu Abbey onto this interactive [application].'* (M. Montagu Scott 2010, launch speech, 19<sup>th</sup> May)

The collaboration/partnership was extensive, and although I thought it had worked well, it was reassuring to hear that Beaulieu thought the same. Chapter 2 Section 2.1.1. describes the networks that were so important in the formation and outcome of the Beaulieu Abbey kiosk interpretation. Thomas (2015) states how vital networks are to an organisation and that 'you are

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<sup>79</sup> The full speech has been transcribed from the video taken at the event. The video can be viewed on this link: <https://www.youtube.com/watch?v=qS9pyOZJVhU> Photos available on this link: <http://thetalkingwalls.co.uk/wordpress/?p=957>

only as good as your networks' (Thomas, 2015) supporting the significance of Montagu Scott's recognition of these networks, and my reflective observation in Chapter 2.

Also, Montagu Scott's speech mentioned a brief outline of the kiosk interpretation's content, in which it was described as 'very in-depth'. The content was more in-depth than initially planned, i.e. it was meant to be a fly-through of the 3D abbey with characters providing the storytelling of life at the abbey. To provide choice, further content was developed such as the quizzes, postcards and fact sheets which different visitor types may find engaging. At the same time, I had not considered additional choice of content may possibly keeping visitors dwelling too long at the kiosk (vom Lehn & Heath, 2005:p.11), disrupting the flow, an aspect commented on by Munn and Montagu Scott in their interviews conducted on 1<sup>st</sup> March 2013 (M. Montagu-Scott) and 18<sup>th</sup> July 2013 (S. Munn). Therefore, Montagu Scott's suggestion that the site was 'live on the website' for guests once they were home may have been reference to 'not dwelling long' now. Montagu Scott also explained that in the future, visitors would be able to download the site/application to their smartphones once they are more in use (M. Montagu-Scott 2010, launch speech 19<sup>th</sup> May). Although smartphones have been popular since the launch of the iPhone in 2007 (Arthur, 2012), the application delivery to mobile at Beaulieu has not yet happened, but it is possible it will be available with the revised non-Flash version<sup>80</sup>.

Nonetheless, it was very encouraging to hear the use of smartphones at Beaulieu was being considered, albeit via downloading the application or viewing the site on visitors' personal mobile devices. The consideration may be caused by the concern shown in Montagu Scott's next launch speech comment about too many interpretation panels spoiling the heritage site's ambience (M. Montagu-Scott 2010, launch speech 19<sup>th</sup> May). Mobile devices installed with the website/application provide a method of accessing much more information than can be portrayed by interpretation panels across the site, and therefore allowing the site to look more natural.

### 3.1.1.3. POST-LAUNCH: FIELDWORK (INTERVIEWS & LAUNCH SURVEY) (CYCLE 3)

This section evaluates the interviews with the Beaulieu Team, Design Team, Launch Guests and External Professionals.

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<sup>80</sup> Currently being optimised to work on multi-platforms via a responsive website and application making use of HTML instead of the original Flash software.

The Interviews are the most significant data relating to assessing the expectation of being able to provoke rich descriptions of the participants' past experiences, backgrounds and professions (Bloomberg & Volpe, 2012). Re-visiting people I had worked with, hearing about how they came to be where they were at the time of the interview, and their remembered experience of the launch and application, provided data that also enriched my experience. The insight to their achievements and their journeys in achieving their goals and roles were crucial in understanding their professional life, and a privilege with regards to their personal life.

Backgrounds & Experiences:

The educational qualifications of the participants varied although not as much as I thought they might, considering the areas each participant now worked within. Reviewing the various degrees undertaken, I rationalised the range to a broader categorisation (see Fig.85) to make a comparison between the initial areas of educational study to the subsequent career areas each participant is

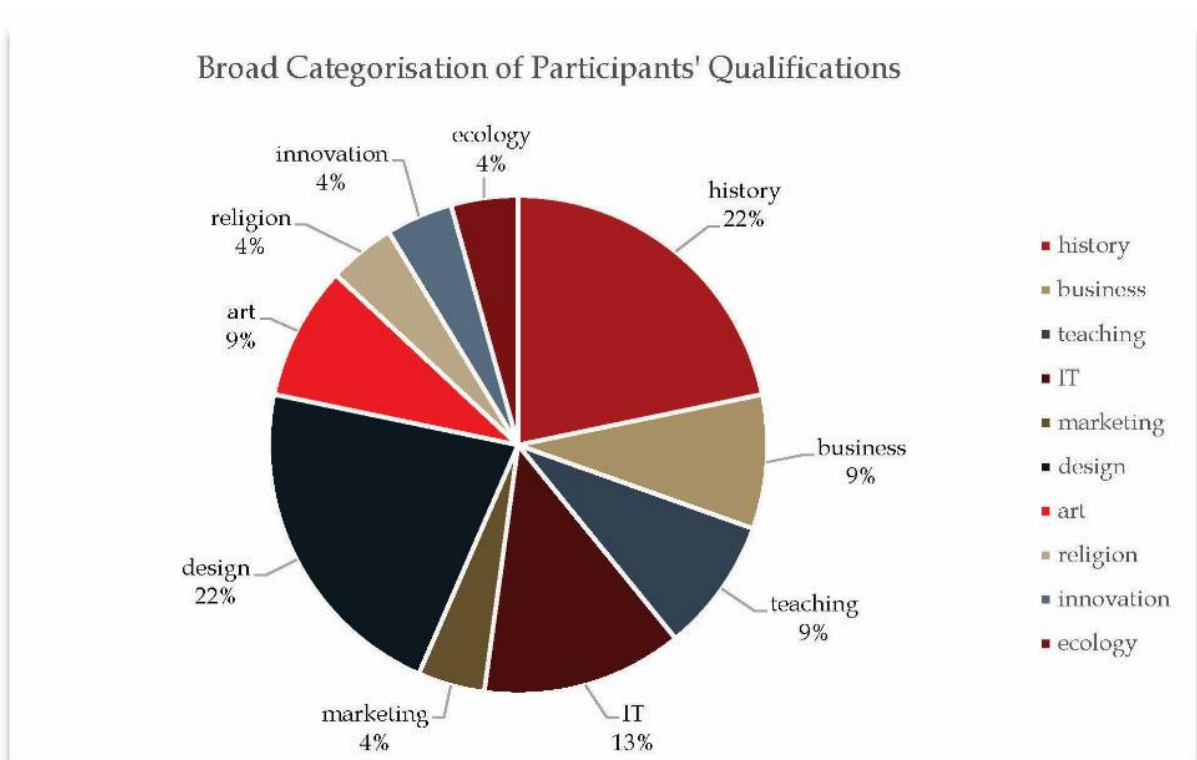


Figure 85: A Broad Categorisation of Participants' Qualifications (Wilson, 2018)

now situated (see Fig.86). One of the notable differences is the lack of 'religion' in Fig.86, this is due primarily to one of the Launch Guests, who although was the Dean of Winchester Cathedral, a considerable amount of his work dealt with the curation and design of the religious houses,

including Winchester Cathedral. His specialism became more to do with historical places, assets and audience interpretation which was explained as follows in an interview conducted on 13<sup>th</sup> November 2013:

*'I found myself suddenly having to deal with really quite considerable historical assets and open them up to the community and interpret them.'* (Rev'd J. Atwell 2013, interview 13<sup>th</sup> November)

Rev'd Atwell felt the religious aspect was about engaging the visitors with the 'beauty and wonder' of the story of faith and 'unlocking that sense of awe and wonder' (Rev'd J. Atwell 2013, interview 13<sup>th</sup> November).

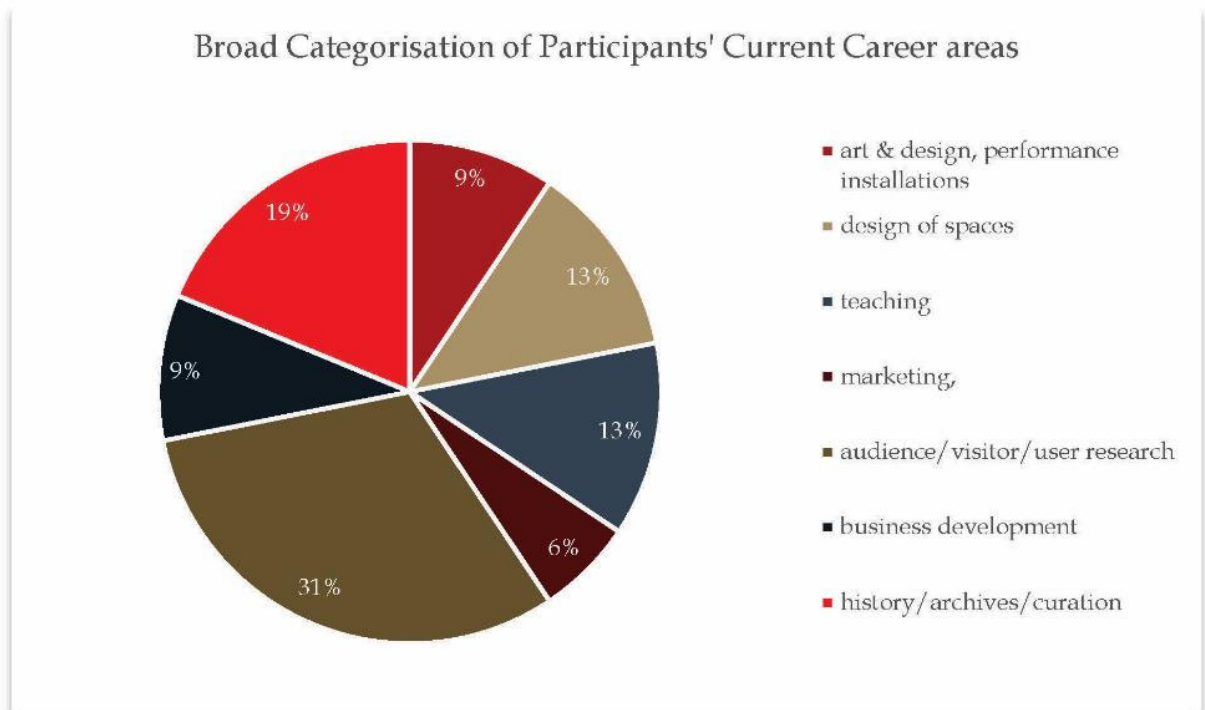


Figure 86: A Broad Categorisation of Participants' Current Career Areas (Wilson, 2018)

Another area of change between the two diagrams is the addition of 'audience/visitor/user research' in Fig.86. Evaluating the careers overall, the need to consider audience/visitor or user in their current roles, 10 of the participants saw this as a major part of their profession and would not be able to do their role justice without this consideration. Designers, educators, marketing, art/performance installations, curation and business development work with/for audiences, visitors or users, consequently the majority of the participants will have researched this area.

The participants with a background in history then took this forward in either a teaching, curatorial or archives specialism, often as a combination. What became clear, was the multiple skills and specialisms each of the participants were able to call upon within their current roles, with the roles often also multiple. The importance of being able to have multi-skilled professionals collaborating on different interpretation projects as a team was also highlighted in the case studies and literature review (Lockwood, 2009:p.xi; Roberts, 2014:p.203).

The purpose in researching the background and current roles of the different teams was to understand whether their knowledge, experience and expertise influenced the development of their career focus, and subsequently, in the case of the Beaulieu Team, the interpretation design/process. Different cultural and educational upbringing provides a unique set of experiences in addition to skills and interests, but it is the ability to translate experiences to others that is valuable in sharing that knowledge. The Beaulieu Team's backgrounds and experiences support this view.

#### Launch Guests Feedback of the Kiosk interpretation and Launch:

The general feedback from the Launch Guests concerning the event and application was quite positive. Two of the Launch Guests knew of my work with 'The Talking Walls – Dunster Castle' application, before the Beaulieu Abbey kiosk interpretation, and had been advocates of the choice of levels, time-slices, tours, characters and storytelling presented in the Dunster version, and subsequently the Beaulieu Abbey version. During an interview with Dr John Richardson conducted on 14<sup>th</sup> May 2014, he commented that he had: 'been a good advocate of your product. I always thought that that rich information, yes it should already be out there.' Rupert Thomson, in an interview conducted on 25<sup>th</sup> October 2013, also comments on his support of The Talking Walls concept:

*'I remember the first impression was I really liked the idea. I mean this was quite early days for the media and the development of the media... and I don't think at the time there were any applications like this, but it wasn't far away.'* (R. Thompson 2013, interview 25<sup>th</sup> October)



The Dunster Castle heritage site application had six time-slices<sup>81</sup>, ranging from the 1100s through to modern day, to match the six major architectural changes. Beaulieu Abbey has only three: when it was being built in the 13<sup>th</sup> century, its heyday (14<sup>th</sup> century) then the dissolution in the 16<sup>th</sup> Century. The navigation of content, therefore, had to change<sup>82</sup>, but the principal of three levels (child, adult and academic) remained, as did the character choice, different tours narrated by the different characters and visuals of the different time-slices. These areas were the main focus of attention and comment. They were also the areas that differed in a typical heritage site interpretation and ‘theme’, i.e. one period of history. This aspect was commented on in an interview with Dr. John Richardson (2014):

*‘National Trust will fix up a building, they’ll pick a certain timeframe, and they will make it, right that’s it, and then it’s locked, that is how it was... you could pick 12 different history styles and see through the ages how this thing evolved and take it from a ruin that it is now back to....’ (Dr. J. Richardson 2013, interview 14<sup>th</sup> May).*

Rupert Thomson also commented regarding the choice of level concept:

*‘they can only communicate at one level so, and yet the people that are visiting are multi-layered. (R. Thompson 2013, interview 25<sup>th</sup> October).*

The kiosk interpretation enabled visitors to ‘be’ in a specific space and then see how that space would have looked in each of the other time-slices. The ability to view the different periods of time, or be guided around the site by a character of personal choice provided a much richer experience in understanding the culture of the time and the space. As in Rupert Thomson’s comment, visitors are multi-layered. Therefore, a multi-layering of information regarding content, time and space would seem appropriate.

John Pemberton (2013) takes this further with regards to the opportunities for visitors to visually explore a building that no longer exists, in part or completely:

*‘I was impressed with it, I was particularly impressed with, I think an underlying theme of mine which was only one component of what you were doing but was the idea, because Beaulieu Abbey and almost all the other abbeys are in ruins in Britain because of the*

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<sup>81</sup> Time-slices in this instance equate to the different major architectural changes at the heritage site.

<sup>82</sup> Difference in navigation for the earlier Dunster Castle prototype and the Beaulieu Abbey kiosk interpretation can be seen on this link: [http://thetalkingwalls.co.uk/wordpress/?page\\_id=1070](http://thetalkingwalls.co.uk/wordpress/?page_id=1070)

*dissolution of the monasteries; in France to the French Revolution and so forth and what you could do with this graphically is you could start out with a graphic image of the foundations or what remnants of the building there were standing and then you could build it up visually on a screen into the form that the whole building took. And you could do that; you could also do it historically over time so you could build it up into its initial form which was often quite small and modest and then when they added additional wings to the buildings or new buildings, you could add those on and you could do something visually through visual media that is totally unachievable in any other way; you could build this image of a building being constructed and through time how it had developed. And that whole notion really intrigued me; it was that particular notion that drew me in. I know there were other components to what you were doing but that was the driver for me.’ (J. Pemberton 2013, interview 1<sup>st</sup> October 2013)*

John Pemberton’s observation of the kiosk interpretation’s focus on the architectural aspect of a heritage site was similar to Rev’d Atwell’s; both having an interest in built heritage albeit for different reasons. In portraying how buildings used to look, the design of the buildings at different stages, and how they were constructed were an important part of the application as an educational resource. It was pleasing to see this understood and remarked on. Re-construction of heritage sites is not unique, nor was it in 2006 when I first approached Beaulieu. Technology and software in recreating heritage sites has advanced considerably since, making it possible for small companies to achieve reasonable results in a shorter space of time. The difference in the models between now and early 2000s, was that the buildings were often not built at true scale. They were also usually box models mapped with an image. Being able to use architectural software which can then be used within game engine software, allows interaction with the buildings and site, not possible before. It also enables the same models to be viewed as ‘architectural plans, elevations and sections, highlighting the different time periods and construction, adding to the reality of the reconstruction.

Narrative and storytelling through a choice of characters provided positive feedback from the Launch Guests participants, supporting the Beaulieu Team’s feedback, and interpretation professionals’ research (Veverka, 1994; Joeckel, 2002; Black, 2005; Ham, 2013; Howell & Chilcott, 2013). A couple of the comments focus on how popular the characters were in helping to bring the site alive for visitors. Dr. John Richardson stated positively about the characters in his interview conducted on 14<sup>th</sup> May 2014:

*'Characters, which again is a great asset and just making it rich and alive for people, otherwise you've got to look at it and kind of vision what it was like and most people wouldn't have the ability or the context...'* (Dr. J. Richardson 2013, interview 14<sup>th</sup> May).

as did John Pemberton (2013):

*'Certainly the tour aspects are one thing which I know the public like very much about it is the way you've used personalities from an abbey, such as a monk or one of the servants of the abbey or the different staff the abbeys have and so on and expressed it in their view as to what they felt about it using an actor to read their sort of monologue of their description of their daily activities.'* (J. Pemberton 2013, interview 1<sup>st</sup> October).

Beaulieu has costumed guides which form their 'Living History', mostly at Palace House although also used at the Abbey, demonstrating an awareness of how 'characters' can impart information about a particular period of time. The Beaulieu archivist/educator was extremely knowledgeable about the characters the application should include and recommended King John, Queen Eleanor, Perkin Warbeck, Abbot Sulbury and Durandus, the Master Mason. Each of these figures were connected to or lived at Beaulieu and helped to provide authenticity for the storytelling of their time. The remaining four characters were created to provide an understanding of monastic life.

Negative feedback of the launch event mainly concerned the lack of mobile devices working with the application which was indeed a shame and disappointment. John Pemberton commented in his interview, conducted on 1<sup>st</sup> October 2013:

*'I know it wasn't your fault, but there was one shortcoming of the Beaulieu project particularly which is that it wasn't followed through to the point of having, was to having the point of a single display, static display, which was a touchscreen and people could work with that, but it wasn't in terms of having either a handheld device ...and I think that's a real frustration because it would take off, even more, were one able to do that.'* (J. Pemberton 2013, interview 1<sup>st</sup> October).

Rupert Thompson also commented about the lack of the mobile devices in his interview conducted on 25<sup>th</sup> October 2013:

*'we looked at the screens because the handsets weren't available and yeah, that's what I remember but I'd of course seen the material before.'* (R. Thompson 2013, interview 25<sup>th</sup> October).

I have spoken about the reason in the two previous sections, but it was interesting to evaluate and understand the Launch Guests' view of the missing handsets, and how, ultimately, mobile devices should be used in addition to, rather than a replacement for other methods of interpretation. Pemberton's (2013) and Thompson's (2013) feedback highlighted their awareness of how the concept was ahead of the technology available at the time to deliver.

From the comments and feedback provided by the launch guests participants, the kiosk interpretation provides a rich source of different facets of content for engaging a variety of different visitor types while on or off site. More importantly, it should not be just on one kiosk and screen, but available on more kiosks, more sites and mobile devices. The levels should also be completed to include adults and academics. The feedback across each of the participant groups and launch survey supports the success of the kiosk interpretation, providing an awareness of how relevant the design, design thinking and research in creating the application has been, and that it should be developed further to complete as originally planned.

### 3.1.2. DESIGN PROCESSES IN HERITAGE INTERPRETATION

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This section evaluates results of the analysis in the use of design processes in heritage interpretation, whether a user-centred design forms part of the design process and whether HSI designers typically communicate with visitors. Curatorial teams at heritage sites are the most knowledgeable about their visitors, and provide this information in their briefs to the designers. Evaluation of the case study sites' design processes is included in this section to discover if designers have built on this knowledge, in forming an understanding of the heritage site's visitors, either through the development of personas, or direct communication.

The aim of this thesis was to evaluate the current models that exist in heritage interpretation design and consider whether a new model is required to explain the distinctive roles and interactions between curators, designers and visitors in crafting engaging heritage site visitor experiences. Understanding the design processes used in the models for designing heritage interpretation and whether the processes included/involved visitors at the formation is essential. Through choosing and examining individual interpretations at three separate heritage sites that were similar to those I worked in, I discovered there are aspects of a UCD process (Mattelmäki, Brandt & Vaajakallio, 2011) used, similar to my process. These were mostly the creation of personas to describe a small selection of visitor types to aid consideration of what visitors may wish to see and engage with rather than direct visitor involvement.

Analysing the three case study sites' processes for designing HSI demonstrated visitors' feedback is the main form of consideration when deciding on the type of interpretation to install at the heritage site. It also highlighted the use of visitor advocates (Historic Royal Palaces), the inclusion of front of house staff or visitor guides' feedback from observations and discussions with visitors. At each site, including Beaulieu, this is where visitors then appear to be 'put on hold' until the interpretation is in place ready for visitor engagement. Interviews with the designers and the Beaulieu team support this 'process'.

With regards to Beaulieu, my experience working with the team and the opportunity to create the kiosk interpretation has been commented on as being considered unique:

*'the client normally has a brief so they know. It should be set within an interpretation plan where there may be different interpretation in different ways' (R. Taylor 2013, interview 23<sup>rd</sup> July).*

The private 'family run' site affords opportunities for people to approach them, as in my case, and once approved by the family and the management team, the support to deliver the outcome was excellent. According to the secondary research and analysis of the fieldwork, the 'typical' process stated by Taylor, is through a heritage interpretation design brief or statement that is generally put out to tender or sent to specific companies previously worked with, to invite ideas. Submitted tenders are then vetted by the heritage organisation, and the 'winning' concept is invited to produce a scoping document, stating the concept in more detail, with costs, schedule and team that will be involved (Black, 2005:p.253; Read & Bohemia, 2011:p.3). The consideration for the contracted company is then to fulfil their contract according to the details and schedule provided. The measures of success for both parties are whether it was finished on time, looks and works as detailed/described, and is within budget, therefore fulfilling the agreed brief/contract.

Comparing the results regarding the planning process and the feedback provided by the fieldwork with recommendations from Taylor (2006a), Veverka (2010) and Black (2005) regarding who is typically involved, the initial model instigating the thesis was confirmed. Typically, there is a communication gap by the curatorial and design team in speaking to/involving visitors in the planning process, put simply by artist/designer Katya O'Grady (2013):

*'working just with designer and curator projects like this is nothing; it should be historian, it should be some kind of a psychologist who can analyse with behavior, with visitors.'* (K. O'Grady 2013, interview 8<sup>th</sup> October)

Overall, the 'existing' diagram (Chapter 1, Fig.3) visualises the lack of visitor representation that has emerged from the data analysis of primary and secondary research, and in the design and planning of heritage site interpretation. The results prove similar for other design disciplines, for example, spatial and architectural design in which one of the design team for the Beaulieu Kiosk project now works:

*'There's [the] client and there's [the] user, and we very rarely interact with the user ...'*  
(R. Furse 2013, interview 6<sup>th</sup> Sept)

The client is the primary concern here, which is further supported by the case studies and literature review regarding heritage site design teams. The 'user/visitor' is the reason for the design, yet they are not liaised with, in the design process, the decisions are made by the 'professional,' i.e. the curatorial/stakeholder team at a heritage site. A design process in which a

'user/visitor' team is included would allow a more realistic view of visitors' expectations, needs and wants from being able to discuss the Visitors Team's visitor experiences at the heritage site (Ciolfi, 2012b; Kilian, Sarrazin & Yeon, 2015; Breschi *et al.*, 2017).

With regards to the process, Black (2005) provides a detailed step-by-step guide for museum 'interpretation master planning' which includes a proposed 'interpretative planning process' (see Design Processes Infographic, Appendix L). The process represents the initial steps necessary for understanding the context and strategy for the interpretation exhibition about to be designed and installed. Veverka (1994) also provides a planning model, adapted pictorially for quick comparison (see Design Processes Infographic, Appendix L) which provides a flexible model for most types of interpretation planning (Veverka, 1994:p.32). In a museum, this would relate to a collection or themed exhibition and may be required to be a touring exhibit. Consequently, the factors and considerations of other sites the exhibition may visit would form part of the research in the process shown. Museum interpretation planning or strategy could, therefore, be a more fluid, flexible process depending on the type of exhibition/interpretation i.e. needing to be appropriate/relevant to single or multiple sites. By comparison, a heritage site interpretation may exist and therefore be relevant to just the site involved. Subsequently, the 'Gathering of Information' may include pre-determined interpretation strategies, such as in the National Trust's 'Statement of Significance' example for Lacock Abbey, making it easier to determine the type, and context, of the proposed interpretation.

The initial planning process should then move, typically, on to the formation of an initial brief for sending out to tender, teams contracted, more detailed briefs, design and building of the exhibition ready for installation. Each step has a series of actions and consequences, often not detailed. In Chapter 2, Fig.34 is a more detailed review of the actions in each step undertaken for the Beaulieu Kiosk project, albeit with different headings compared to Black's (2005) process, and Interaction Design Foundation's Design Thinking stepped process (see Design Processes Infographic, Appendix L).

Working through my process, I realised that there are many actions impacting considerably on other actions, yet are not recognised in some of the design process models shown in Appendix L, or perhaps in the right order. The Project Journey Stages, shown in Chapter 2, Fig.34, are representative of my experience in the design process for the Beaulieu Abbey kiosk interpretation (and subsequent projects). The six stages are similar to those of Interaction Design Foundation's

Design Thinking (Teo Yu Siang, 2016) and McWeeney's User Centred Design Process Remix (2016). There is an additional stage 'Design' in the Beaulieu Abbey kiosk interpretation, which is part of the 'Prototype' stage in the two design process models mentioned.

'Design' in the Beaulieu model includes the design of peripheral items such as the design of brand identity, flyers, invites, story books and the characters, rather than simply the interaction design, user interface design and user experience design that the kiosk interpretation application required. Design, similar to 'research' is a fundamental, iterative ongoing process and perhaps, therefore, does not need to be mentioned as a stage in the design process, but in the experience of designing the Beaulieu Abbey kiosk interpretation, the 'Design' stage was a significant phase. Significant in that it covered critical variables for ensuring a useable, engaging and aesthetically pleasing outcomes.



### *3.1.3. VISITOR INVOLVEMENT IN HERITAGE INTERPRETATION DESIGN PROCESS AND HOW SUCCESSFUL VISITOR EXPERIENCES MAY OCCUR*

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In the previous sections, it was confirmed that the involvement and engagement with visitors throughout the heritage site interpretation planning and design process were lacking. Visitors are considered but not part of the interpretation team(s). A new model placing a permanent team of visitors/visitor representatives with the Curatorial Team and Design Team was therefore created in the 'Collaborative Heritage Site Interpretation Design' (CHSID) model (see Chapter 4, section 4.2). This section discusses how the model may work and how the visitor's team may be formed by comparing the fieldwork and survey data with the case studies and literature review data.

The use of visitor advocates has been used successfully in museums, for example, the Science Museum (Burch, 2013), and visitor guides in the Kensington Palace interpretation case study (Gaffikin, 2012). The National Trust works with the community to form a Statement of Significance for the individual heritage sites. Beaulieu undertakes considerable visitor research to have a thorough understanding of their visitors, and use this knowledge and experience to 'champion' for the visitors during their planning and interpretation design (S.Munn 2013, interview 18<sup>th</sup> July; J. Tee 2013, interview 3<sup>rd</sup> July).

For the proposed model, the recommendation is to have a team of visitor representatives, i.e. a mix of local visitors, visitor guides and representatives from local schools and community interest groups such as a Local History group. A 'tender' may be a feasible method of recruiting a Visitors Team. The 'tender' would enable local community members, interested in heritage/history/design but perhaps who do not have the time, or feel comfortable being a visitor guide, to have an input in the process, i.e. similar to Parent Teachers Associations or Board of Governors. I have recently 'tendered' for a team of Student Ambassadors to help lead a series of 'Design~Think~Create - Sustainable Living Challenge' workshops planned for 2021, and received interest from 12 students ranging from undergraduate to PhD level across various subject disciplines. Their enthusiasm for the subject was the primary reason for applying, then the benefit to them in areas such as their CV and employability came second. These students will be working with me in planning, designing and running the workshops, working with and supporting the attendees in developing outcomes to a range of sustainable living design issues. For a future heritage site interpretation for the City of Winchester, it would be an opportunity to further test the 'tender' concept for bringing in a team of local visitors to the overall Project team.

The project currently underway for ‘Malmesbury Abbey and Market Town’ interpretation, has already taken this on board with a ‘Malmesbury Town Team’ consisting of members of different community groups, visitor guides and history enthusiasts, alongside representatives of the town council and abbey. The Malmesbury Town Team has been fully involved through the process, sharing their knowledge, providing opinion on the design and navigation of content, and testing. Representatives of the team were taught how to upload content, which, with a training guide, was passed on to the team of volunteer ‘local’ visitors so they could also be part of enriching the application with content. Their enthusiasm to have an application that promoted their town and enabled visitors to explore the history, buildings, people and walks formed their purpose for being involved. The contracted design and development team also has representatives from different groups and organisations such as the University of Winchester’s Centre of Enterprise, Design & Innovation, Digital Media students and Sprechen, a WiFi specialist SME<sup>83</sup>. Using a team communication tool such as Slack, team members can chat, upload documents, visuals and schedules easily and it ensures all project information is accessible in one place.

The proposed ‘Visitors Team’ may also serve as ambassadors/advocates, promoting the work that goes into planning and designing interpretation:

*‘The successful companies always say how many advocates have you created and it’s these advocates that will spout throughout the world and be your salespeople, and they’ll do it because they’ve fallen in love with something you do... or an experience you had on a day out and I think people now listen much more, they probably always did, but because of the internet, they’ll take reviews of peers, ... they’ll put more credibility on that than they will on a professional review because they’re very cynical about a PR spin.  
(Dr.J. Richardson 2014, interview 14<sup>th</sup> May)*

Therefore, it is possible with the proposed model the Visitors Team will provide the more ‘grass-roots’ aspect of visitor experiences, adding to, not replacing the deep knowledge of how visitors behave and engage with interpretation provided by Front of House Staff, Curators, Educators, combining to act as advocates for visitors (Burch, 2013; R. Taylor 2013, interview 23<sup>rd</sup> July; J. Tee 2013, interview 3<sup>rd</sup> July). This can be seen on a small team scale in Claisse (2018) with her study

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<sup>83</sup> The project seems to be working well; it will be interesting to test the interpretation with Malmesbury visitors once completed in 2020 and compare/evaluate for future applications.

regarding exhibition design for a house museum, in which she involved volunteers and visitors in the design of her exhibition (Claisse, 2018).

#### Visitor Team Input:

The current process for designing interpretation relies on understanding visitors described in previous chapters and sections, through the occasional use of personas, touch points, user journeys and scenarios. An empathic approach helps to look at each part of a visit by different visitor groups from their perspective:

*'it is very difficult to not look at things through your own eyes. I mean I've just had children, I've got two toddlers at the moment, so in fact my understanding of what they want has been obviously greatly improved so I've started looking at things very differently.'* (J. Tee 2013, interview 3<sup>rd</sup> July)

The inclusion of a Visitor Team (VT) would facilitate a more thorough understanding of the personal experiences, the touch (or pain) points of a visit, and how those experiences may change depending on the type of visit, i.e. with the family, as a couple or with elderly relatives (Ham, 2013; Black, 2005; Roberts, 2014; Falk & Dierking, 2013; Pine II & Gilmore, 1998). The stories and experiences the VT would be able to provide at each step of the process would be invaluable. If the VT included a representative from a School's Group, information regarding educational visit experiences could be first hand, and up to date with regards curriculum subjects and areas. Observed feedback regarding how the school children are relating to the interpretation, pre, during and after their visit, would be valuable to have related at different stages of the process.

Personas are a well-known form of building an understanding of who users/visitors might be, but they do need to be properly undertaken to ensure their value in the design process (Grocott, 2010; Matthews, Judge & Whitaker, 2012; Churruca, 2013; Flaherty, 2018). My small sample of personas for the kiosk interpretation was developed through observation of my daughter and mother in visiting heritage sites, plus an understanding of my personal preferences and experience in visiting heritage sites. I knew this was not sufficient, yet time did not allow for the weeks of observations that would generally be considered when creating personas. I also realised that this was not the case for the case study heritage sites, i.e. the time involved allowed. Therefore, the combined experiences of the VT would also be invaluable in helping to build personas for a range of visitor types not included as part of the team. The tone of voice for different age ranges or 'levels' can be checked. The 'layering' and 'dumbing down' of information mentioned by Tomkins,

Montagu Scott, Munn and Thompson could also be checked. Assumptions are, therefore, diminished, and more appropriate, relevant and 'insightful' interpretation design should result for visitors' engagement and experience.

Social media and Trip Advisor were considered particularly useful for 'honest and detailed' feedback. I chose a sample of 30 consecutive reviews per heritage site, in a period of six months from the time of each interpretation's installation. The selection was based on the amount of information provided by the reviewer, i.e. primarily where they were from and the description tag/label indicator provided by Trip Advisor. The reviews were deliberately not read until 30 per site were selected to avoid bias regarding positive or negative experiences. Using Trip Advisor provided an insight to a comparatively small demographic of visitors who have chosen to talk about their visit experience on Trip Advisor. There are other social media platforms and more traditional methods that should also be used to gain a more balanced insight and measure of visitor experiences (Alexander, Blank & Hale, 2018; Su & Teng, 2018). Beaulieu receives 'relatively good feedback' via social media which Jon Tee (2013) found surprising; he thought visitors would use the platform for moaning (*J. Tee 2013, interview 3<sup>rd</sup> July*). Chapter 2 discusses this further and argues that visitors using social media or Trip Advisor wish to have a more professional profile than that of a 'moaner'. Nonetheless, the social media platforms, including Trip Advisor, generally provide honest, unbiased opinions of visitors' experiences, (Lu & Stepchenkova, 2012:p.704; Baka, 2016:p.153; Stoleriu *et al.*, 2019:p.196) with steps taken by the social media platform 'to address credibility concerns' (Ayeh, Au & Law, 2013).

## 3.2. REFLECTION ON PRACTICE AND PRACTICE-LED RESEARCH

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### 3.2.1. REFLECTIONS ON THE PLANNING AND DESIGN OF THE DOCTORAL WORK

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The planning, design consideration and resulting 'designed' structure of my doctoral work and, therefore, this thesis, evolved from recognition of the combination of Black's (2005) Interpretation Planning Model and the Beaulieu Abbey kiosk design process being similar to the reflective cycles of Action Research (Gray & Malins, 2004). The Introduction, Research Approach, Research Design & Methods and Background (Professional & Academic) & Context (Chapter 1), albeit with different titles, formed Stage 1 i.e. discovering, scoping, defining. The Design Challenges & Outcomes, HSI in Practice: Case Study Comparisons and Curator~Designer~Visitor-Shaping Heritage Site Interpretation Design (Chapter 2) formed Stage 2 i.e. analysis and evaluation of practice, design and design theory. Evaluation & Discussion and Reflections as a Design Practitioner, Design Researcher & Academic (Chapter 3) form Stage 3. Reflection takes place for each Stage and each cycle of the three Stages. Each Stage has three Cycles: A, B and C. The structure of the thesis, therefore, follows how I would work as a designer/design researcher but within an academic framework. The three Cycles of the three Stages tie in with the design of the kiosk interpretation's navigational device, the KubeMatrix, also three by three, although cubes not cycles, and the cycles of Action Research.

Working to render my work in this format highlighted the difference in language used between the different disciplines and professionals within HSI design. The method of exploring and understanding the words and phrases in common use by the different disciplines could be further explored with a wider data set. A possible outcome of which, could be the formation of a 'Heritage Interpretation Design Taxonomy' based on Bloom's Digital Taxonomy<sup>84</sup> (Kleinsasser, 1996; Armstrong, 2006; Churches, 2007), enabling a common vocabulary for communication amongst the multi-discipline teams necessary in heritage site interpretation design. However, this goes beyond the scope of this thesis.

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<sup>84</sup> Bloom's Digital Taxonomy is an adaptation by Andrew Churches of Bloom's Taxonomy of Verbs

### *3.2.2. REFLECTION ON THE BEAULIEU ABBEY KIOSK INTERPRETATION*

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#### 3.2.2.1. PRACTICE: CRAFTING THE INTERPRETATION (STAGE 1C: CYCLE 1)

The reflective process, as a method of analysis through an action research approach (Schon, 1984; Chambers, 2003; McIntosh, 2010), has enabled re-assurance and acknowledgement, as a professional designer and as a design researcher, of the benefits of thoroughly scoping a project at the outset (Veverka, 2000; Black, 2011). By working through a series of iterations for the funding application, the process resulted in funds, project requirements (hardware, software) and people that were in place from the beginning of the project.

The planning and Gantt charts detailing the key tasks and their impact on other tasks were critical as a project manager/designer for being able to check and report on progress for the funder, and allow each team member to easily recognise how a delay in one area would affect the progress of another (Black, 2011). The Beaulieu team also would be cognisant of the different stages of development and project start/end date.

The interpretation work developed for the Beaulieu Abbey kiosk provided significant challenges, of which only a few have been noted for this thesis. The experience has been beneficial in many aspects, particularly for understanding the importance of teams throughout an interpretation project and the value of networks in being able to source skilled people, and access their support for the different stages and processes. Archiving rather than deleting records of development such as sketches, reference sources and emails, has also enabled to reflect on practice and refer to it, or resurrect for subsequent projects (Bergeron, 2011; Kilian, Sarrazin & Yeon, 2015).

Knowing your team, i.e. having prior experience of their work and abilities to be able to 'mesh' well and share an understanding of the project/tasks was essential for the Beaulieu Abbey kiosk project to reach a successful outcome in a short time frame. In subsequent projects, this has also been critical for a successful outcome. A thoroughly scoped project brief, and an experienced 'known & trusted' team was critical for implementing and reaching the planned outcome on schedule (Kitimbo & Dalkir, 2013).

Making use of empathic design processes and techniques for designing HSI may be sufficient for allowing insights to a heritage site's visitors' expectations as in the Beaulieu Abbey kiosk, but the reflective process highlighted an uncertainty as to whether this area of the design process could have been improved. Having explored how a sample of heritage site design teams manage their

process in the design of HSI and whether they involved visitors, helped determine and propose a new interpretation design model and process for heritage sites of this kind.

#### 3.2.2.2. LAUNCH: CURATING THE LAUNCH EVENT (STAGE 1C: CYCLE 2)

The initial reasons for the kiosk interpretation was to increase footfall to the abbey and for visitors to understand and recognise the importance of the historic site in addition to the Palace and National Motor Museum. Knowing whether the kiosk achieved such aims required feedback from the use of surveys, and from observation by guides and other Beaulieu staff. The initial verbal feedback at the launch was positive, which then compared favourably with questionnaires completed by the departing launch guests. Using an Action Research approach for reviewing, analysing and reflecting on the data produced leading to the launch and at the launch event has led to a greater understanding of the impression the kiosk interpretation has made on the Beaulieu Team.

The launch event allowed various opportunities for receiving feedback, including the process leading to the event. For example, meetings with the MA Marketing students allowed an understanding of how other people may have chosen to organize the event proceedings differently, and how crucial it was to communicate clearly.

The collation and curation methods for the archival data has been an insightful journey, as well as a pleasing, occasionally frustrating but satisfying process for building a visual record of the planning, development and understanding the significance of the launch event. This practice of documentation and reflection, and reviewing practice and process, has improved my professional practice. The value of considering the file formats (need to be in an appropriate web format), the longevity of the files archived and the platform to do so has been an important aspect of creating the Reflection on Practice website. From the start of a project, using a date order/naming system has aided cataloguing and archiving material in chronological order for ease of reference for future interpretation projects (Ferguson, 2012).

#### 3.2.2.3. CREATING POST-LAUNCH: FIELDWORK (STAGE 1C: CYCLE 3)

Action research was followed by IPA as the dominant research approach for the Post Launch interviews to allow reflections on the experience with the Beaulieu Abbey kiosk interpretation and stakeholder involvement in the design and development of the kiosk interpretation. The interviews helped me in understanding how important backgrounds, interests and experience

helped to form a body of knowledge, which although varied, had managed to steer each participant in their career path, rather than each having followed a pre-planned career path. The feedback about the work was positive, validating design decisions with regards to levels of content, time-slices, characters, rich visuals and ultimately the visitors' ability to choose content to explore further.

For one or two of the participants, their reflections on their different journeys in reaching their current roles caused occasional self-exclamations of surprise. These appeared to be in recognition of understanding the impact of certain life choices, which they had not expected as part of the interview process. Sense-making is a core value of IPA, for participants and for the researcher analysing the transcripts. I also found the process surprising, discovering interests and expertise in a few of the participants which I would not have expected for the professional role they were in.

Three interviews were more stressful, as far as I was concerned, due to unfortunate circumstances. On one interview occasion, I was late due to roads being closed and the diversion taking twice as long to reach; on another occasion, there had been an accident ahead resulting in a lengthy queue, and in another, the batteries decided to run out during the interview. New batteries were packed prior to each interview as a fail-safe, therefore, although disruptive, at least the interview could continue. While the participants were kind hearted and understanding, nonetheless I felt slightly ill at ease having arrived late, and therefore possibly rushed some of the aspects of the interview.



### *3.2.3. REFLECTIONS ON ACADEMIC PRACTICE LED & PRACTICE BASED DESIGN RESEARCH*

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As I have undertaken a Practice-led design PhD, my submission includes an exhibition of my practice i.e. all the developmental work and outcomes in the crafting of the Beaulieu Abbey Kiosk interpretation. As far as I was concerned, my practice is as important as my research, the two co-exist, one cannot be done without the other, despite the two carrying different “weights” in the submission of my doctoral work.

Another query concerned the inclusion of a reference list and bibliography. For my PhD, the same as other PhD students, I have undertaken considerable research, which has crossed several disciplines. Reviewing literature and dissertations of practice-based PhDs to gain comparisons and answers, was necessary. Through this process, I discovered there were several approaches for design practice and research, one of which was Practice-led. Reading the difference provided by Candy (2018), I realised that my thesis was Practice-led design research.

The additional research regarding design practice and design research has been surprising. The discussions/debates on the value of design practice in and for research needs more attention which I hope to review further as an academic/practitioner and design researcher.

## *SUMMARY*

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This chapter has evaluated the three main areas of research undertaken to answer the research question. The result demonstrated there is a lack of an inclusive and collaborative design model and process within heritage site interpretation design. From the analysis of design models and processes used in museums and design practices, it became evident that this was generally not the case for heritage site interpretation design and, therefore a new collaborative heritage site interpretation (CHSI) design model and process has been developed. (Detail of the new CHSI design model and design process can be found in section 4.2)

During the evaluation and discussion of my practice in crafting the Beaulieu Abbey kiosk interpretation, the launch event and post launch feedback, analysis of material and feedback has provided a deeper understanding of the importance of knowing who you are working with, their skills and abilities, regardless of role, to be able to work collaboratively. The interviews were insightful, particularly in understanding that roles do not always convey your skillsets, past experiences or interests to colleagues, therefore, misunderstanding or assumptions may occur. By having a consistent team who have experience of working together, and have built an understanding of their colleagues' background and experiences, would provide trust and understanding of available expertise in working together on HSI projects.

What also emerged from the interviews and feedback includes suggestions for the kiosk interpretation from user experience perspectives with regards navigation and choice. An appreciation of the rich visuals and storytelling conveying life and culture of the abbey in its heyday, the varied methods to engage with the characters and their stories were highlighted, with recommendations to further the Beaulieu Abbey kiosk interpretation application.

Furthermore, feedback provided about choice of content, platform and provision of handheld devices has been valuable in recognising technology has to be thoroughly considered rather than included because it can be. The placement of technology such as a kiosk also needs careful consideration for not interrupting flow of visitors, and possible delay to accessing information due to queueing. The Launch also highlighted that expectation of technology by curators, stakeholders, designers and visitors varies significantly, and if not met, creates disappointment, possibly providing a negative experience for those involved.

Other than the valuable visitor insight social media, such as Trip Advisor, may provide curators and interpretation designers, it is possible a more comprehensive use of social media channels by the heritage sites would help visitors understand what was available and when, saving disappointment in visits. Further research questions validity of social media reviews, and that traditional methods for obtaining visitor experience reviews and feedback should be included to provide a more accurate measure of visitor experiences. The task of anticipating and satisfying visitors' expectations when they have differing expectations, needs, wants and approaches for a visit, can be considered almost impossible, although often an expectation for the role of most visitor services' staff and volunteer guides. Therefore, visitors as part of a collaborative team for heritage site interpretation design and how this might work was discussed. A workable suggestion was to send out a 'tender' to the local community to seek a team of 'visitors' who would have time to be involved at each stage of the interpretation process. The resulting Visitor Team would be advocates for the heritage site's visitors and therefore need to be fairly representative of a range of visitor types. The Visitor Team addition to the design and planning process, would provide the missing link, or gap, in understanding what visitors may expect or prefer to see and engage with during their visit to a heritage site, and therefore aid in creating positive visitor experiences.