Perspectives on Impact, Technology and Strategic Management

Heritage Management Series

Volume 1

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Foreword

The cultural heritage sector is facing important challenges in pursuing and sustaining its fundamental mission of protecting and preserving historic and culturally important buildings, monuments, and museums. There is an almost universal scarcity of funds for investing in cultural heritage sites. Major funding sources, such as public-sector funding bodies, have many competing demands on their budgets. In the public sector, funding bodies constantly question why extra funds should be directed at cultural heritage instead of additional funds for ‘vote-winning’ sectors such as education or health. There is a perception that heritage is a luxury compared to dealing with issues such as education, health, employment and defence.

Heritage is often highly valued in cultural and social terms but policy makers increasingly seek justification for allocating incremental funds on the basis of perceived socio-economic benefits. Here lies a fundamental problem for heritage – the costs of heritage are highly visible in the budgets of government funding, but the benefits are less visible, often intangible and difficult to capture in conventional terms. In the policy-making arena, where decisions concerning the allocation of funds take place, cultural heritage organisations are often ill-equipped to forward a socio-economic case for investment. Cultural heritage could be considered as an emerging, and potentially significant, industry in its own right, but attempts to evaluate and measure its socio-economic contribution are relatively under-developed.

Most cultural heritage sites have not systematically developed tried-and-tested techniques or processes to evaluate their socio-economic contribution. Such sites often find themselves receiving excellent rhetorical support from policy makers and public bodies for their vital role in preservation and protection, but still struggle to attract incremental financial support that would ensure the sustainability of many cultural heritage sites. There is little doubt that the profile of heritage as a potentially important driver of socio-economic benefits to communities has been increasing but the tools, methodologies, and capabilities for evaluating the socio-economic contribution are in their relative infancy.

It is apparent that cultural heritage can have an impact at many levels, including economic, social, cultural, educational, and environmental. These different impacts require different methodologies and capabilities for evaluation. Priority impact evaluation areas may vary from site to site, depending on a number of factors such as stakeholder expectations, policy and funding contexts, and the underlying mission of the site.

The Heritage management series is a resource for the heritage community supported by the European Commission’s EPOCH Network of Excellence, the CUBIST Research Group, Brighton Business School and Brighton and Hove Museum Service. This volume provides examples and case studies of how heritage can be used to increase positive impact on both society and the economy. It is hoped that the multi-disciplinary approaches considered here will stimulate discussion and produce interesting exchanges of learning and hopefully a mutual appreciation of the contribution made by different disciplines to the development of the cultural heritage sector.

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Part 1

Conceptualising cultural heritage
1 Conceptualising the heritage site: understanding socio-economic impact

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Although an increasing number of socio-economic studies are being conducted at cultural heritage sites, these tend to focus on specific impact dimensions. This model offers a holistic framework for analysing socio-economic impact of heritage sites. It presents impact as a dynamic concept and provides a typological basis for analysing impacts. The holistic impact model consists of five elements: the cultural heritage site (CHS) impact context, the site mission and objectives, the site stakeholders, and the site management and decision making context, which all influence and contribute to the potential socio-economic impacts of a heritage site. The different components of the holistic framework model and its relationship to impact evaluation are examined below.

1.1 Introduction

Most impact studies undertaken to-date have usually focused on a single impact dimension at one moment in time. This research takes a broader view of impact through the use of a holistic analytical model (see Figure 1). It attempts to capture the complex, multi-dimensional nature of impact, the multiple influences on impact, and offers a guide to which impacts should be examined, given the specific circumstances of a cultural heritage site. This is not an exhaustive account of all the influences that affect impact at heritage sites but a thematic overview of such influences.

Figure 1: A dynamic holistic impact model for cultural heritage sites (CHS)

Socio-economic impact embraces many possible impact dimensions (e.g. economic, individual, social, environmental, etc). Within each dimension there are a number of possible methodologies which can be employed to identify and ‘measure’ impact, each method having advantages and disadvantages.
The holistic impact model consists of five elements: the cultural heritage site (CHS) impact context, the site mission and objectives, the site stakeholders, and the site organisational context/management and decision making context, which all influence and contribute to the potential socio-economic impacts of a heritage site. The different components of the holistic impact model and its relationship to impact evaluation are examined below.

1.2  The heritage site (CHS) impact context

The impact context is interpreted broadly as the specific macro-contextual influences and micro-contextual (such as organisational) influences on a cultural heritage site. Macro contextual influences can include:

- Macro-economic environment
- Policy context
- Legal framework
- Cultural context and values
- Technological context.

The micro-contextual influences exist in the local environment of the site. These influences include elements such as economic, political, funding, demographic, legal, competition, infrastructure, etc. For heritage managers the impact context creates opportunities and threats for their organisations and can impose constraints on decision making. Most of these factors are beyond the direct control of cultural heritage managers, but nevertheless affect heritage site strategies and final impacts and outcomes. Furthermore, many of the factors are inter-related and so for example, local economy could affect heritage site funding or the policy context could affect the legal framework.

1.2.1  The macro environmental context

Each site operates in a macro-national context (and wider European and global context). A number of influences from this context affect heritage sites, these include:

- Macro-economy: The macro-economy (regional, national and international) affects, for instance, tax revenues, disposable income, and policy funding priorities. The macro-economy has a major influence on the heritage sector.
- Policy context: The macro-policy context is another important determinant for potential outcomes and impacts at heritage sites. Policy is fundamental to understanding impact; it influences heritage sites at multiple levels. It determines what gains funding and what does not, what is conserved and what it is not, it influences local authority policy, and it can also affect national legal structures which influence the heritage sector, etc. (Mignosa and Rizzo 2004, Rizzo and Mignosa 2006).
- Cultural context and values: The ‘cultural context’ and values of a society in supporting heritage, will in turn affect practical policy and funding priorities. For example, the cultural context helps define heritage. As Ashworth and Howard (1999: 11) note “Heritage is whatever people want to conserve, preserve, protect, or collect”. As such, definitions of what should be preserved can differ between countries (i.e. market squares in Germany, country houses in the UK, or heritage coastlines in France). Furthermore, the definition of what constitutes ‘heritage’ is not static but dynamic. In the developed world the definition of heritage has broadened considerably in the later half of the twentieth

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1 Of course, some elements within the impact context (such as policy, funding and legal frameworks) can straddle the border between macro and micro influences.
century. It is important to acknowledge that as time passes the definition of heritage will continue to change according to different political aspirations, and the increasing input of communities and groups outside of the traditional field of ‘experts’.

- **Technological context**: It is important to consider technological developments and how these might affect the visitor experience. New ICT hardware, software and their associated standards are being developed continually. The applicability of these technologies and standards to the heritage sector is dependent on economic and social factors such as cost and user acceptance (e.g. in the last fifteen years websites have become an integral part of heritage marketing and presentation, this has only become possible through the global advances in ICT and the acceptance and penetration of the PC and Web use in households across Europe).

In a dynamic model such as this some allowance must be given to the ability of a heritage site to influence the impact context. However, much of the macro context is beyond the sphere of influence of cultural heritage sites. Such sites are unable to exert any influence on the regional, national and international economies. Similarly, the development of technology such as ICT takes place outside of the cultural heritage sphere (usually in the commercial or military sectors) and gradually migrates to the heritage sphere.

### 1.2.2 The micro environmental context

The micro environmental context includes the local demographic profile, economy, policy and political context. For example, numerous local authorities and governments have developed strategies, with accompanying funding, targeting heritage as a key element in regeneration programmes.

In heritage sites with a strong orientation towards tourism, a principal element of a site’s economic impact will depend on the total visitor experience which itself is dependent on numerous off-site factors (e.g. coordinated local tourism strategy, the presence of other visitor attractions, quality of facilities such as transport, restaurants, hotels, etc). It is rare for a heritage site to be immune to these factors.

*Competition or complementarity*: The degree of competition or complementarity with other attractions can also influence impact. For example, a heritage site within a historic urban centre (such as Rome, Venice or Paris) could face competition from numerous alternative heritage attractions; however, the nucleation of heritage sites within a town or city can act as a stimulus to attract visitors. In such cases the visitors would be more likely to be interested in heritage tourism. Such situations have been given the label ‘co-opetition’. Of course, the competition is not limited to other heritage sites, any attraction which could divert tourist footfall away from heritage represents potential competition, but the creation of a diverse tourist product offering is likely to be beneficial for attracting a more diverse range of visitors.

In the dynamic model there is the potential for sites at the micro-contextual level to have some influence over the ‘impact context’. Cultural heritage sites have a greater potential to influence and have an impact on the micro context compared to the macro context. Some heritage sites can make a (sometimes significant) contribution to the local economy through increased visitor numbers, capital expenditures, or brand value.

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2 Early definitions of cultural heritage that encompassed the monumental remnants of cultures were gradually extended to include new elements from non-artistic sectors of activity such as industrial heritage, or from specific contexts such as the underwater heritage. Today, the notion of heritage is much more open, and is used to reflect living culture rather than just our past. UNESCO now includes in its’ definition of cultural heritage historic cities, cultural landscapes, natural sacred sites, underwater cultural heritage, museums, movable cultural heritage, handicrafts, documentary and digital heritage, cinematographic heritage, oral traditions, languages, festive events, rites and beliefs, music and song, the performing arts, traditional medicine, literature, traditional sports and games, and culinary traditions.
1.3 Mission, vision and objectives

The *mission* can be thought of as a heritage site’s overriding purpose. It outlines the broad general directions that an organisation should and will follow. Questions that need to be asked include; what is the site there for? Whom is it serving? Who should it serve? Why is it being funded?

All heritage sites have a sense of their mission, either explicitly or implicitly, which partly reflect the macro and micro impact context (the culture, the national system, and corporate governance and legal system) and also the power and interest of the stakeholders. As a process, not least to guide an impact evaluation, it is useful to know who decides the mission and how it is decided (see Figure 2).

![Diagram of mission, vision, and objectives]

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The *objectives* of an organisation represent a more specific commitment, often over a specified time period, consistent with the mission (this may be quantified, but this can be inappropriate in some circumstances). Objectives take the generalities of the mission and turn them into more specific commitments: usually this process will cover what is to be done and its timing. Different kinds of objectives are possible: some will be quantified, some not. Of course, there may be conflict between objectives, particularly between the long-term and short-term interests of the organisation. Typically, objectives should be challenging but achievable.

Objectives may be seen as more of a heritage management tool, being statements of specific outcomes to be achieved which may or may not be measurable. For example, in the UK there is a national benchmarking process for museums which offers comparisons against certain prescribed criteria. There are also performance indicators being employed by various museums. Despite the growing targets/objectives culture in the public sector of the UK there is a need to be sceptical of their role and aware of the potentially distorting effects in delivering a service.

Most heritage sites express their *values* in two key ways: Through their services (what they do): such as addressing educational and social needs and their organisational practices (how they do it): who owns, controls and benefits from the value created by the heritage site, employment practices (who is employed, participation, job design, etc), and the relationships between different stakeholder classes.

One role of a socio-economic impact analysis would be to evaluate the extent to which the mission, values and objectives are being achieved. Are the intended outcomes being
delivered? Should the mission and objectives be revised? Which impacts should be evaluated?

1.4 Stakeholders

The holistic model places stakeholders as a separate dimension of impact because they are a key consideration for all the other components of the model because they either directly or indirectly influence final impacts. There are numerous definitions of stakeholders; “Stakeholders are those individuals or groups who depend on the organisation to fulfil their own goals and on whom, in turn, the organisation depends” (Johnson et al. 2006). Broadly speaking stakeholders encompasses all those who have an interest in the site and its running. Stakeholders are critical for impact evaluation, because they have:

- A key role in forming a site’s mission and objectives
- Strong influence over strategy and management decision making
- A high importance in establishing which impacts are priorities and which are selected for measurement, and
- Influence over the cost and complexity of the impact measures chosen.

Stakeholders can be divided into a number of groups:

- Group A stakeholders: General public, press

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3 Of course, stakeholders are not separate entities they are integral to all the components of the framework from management decision making, mission and objectives, to impact context.
• Group B stakeholders: Heritage interest groups, heritage support networks
• Group C stakeholders: Local authority, trade associations, wider client groups
• Group D stakeholders: Funding organisations, narrower client groups, trustees, the board of directors, staff, and family of staff.

Of course each of these groups has differing levels of power and interest in the heritage site. For example, a museum curator, or the board of directors would have both a high interest in the impacts of the site and a high power to influence change. Many heritage sites are publicly financed and are required to be accountable to a range of stakeholders. When difficult strategic or investment decision are being considered it can be useful to map stakeholders in terms of their power and interest in the outcomes of a decision to aid the political process of the decision making (see Figure 3).

1.5 The heritage site’s organisational context

Organisational context of the heritage site is central to understanding impact. The impact of any site is heavily dependent on its location, quality, significance and the scale of the heritage site itself. As sites vary in their local, regional, national and global significance then so will their relative impacts. Some factors to consider include:

• Ownership: The ownership of heritage sites is a principal determinant of the impact that a site will have. Ownership influences funding sources, governance structures, objectives, etc. However, ownership of heritage sites is not static. For example, because cultural heritage sites can have high maintenance costs – especially in countries with strictly enforced legislation regarding the upkeep of such sites – there is a tendency to see the movement of ownership from private to public hands. (Although, there are limits to the size of the public purse and without sustainability it is questionable as to how long the transfer of assets from private to public hands can take place).

• Corporate governance: Heritage sites can have a wide range of governance structures ranging from private and public, to not-for-profit and charities. Each of these will influence the impacts and outcomes of a heritage site. While it would be simplistic to assume that all sites under private ownership have a greater profit motivation than sites in public ownership there is a trend towards this scenario that cannot be ignored.

• Location: Location is paramount for the impact of a cultural heritage site. The location determines factors such as accessibility to transport networks, proximity to population centres links with other potential attractions. Surprisingly, location can be a dynamic entity. Although cultural heritage sites are fixed entities within the landscape or urban fabric the significance of the surrounding locality can change over time. A rundown part of an urban centre can become a popular tourist zone increasing the potential of the heritage sites within that area (such as Barcelona’s Gothic quarter, the Barri Gòtic, preserved through neglect and now one of the principal tourist magnets in the city). Alternatively, the creation of new transport links such as low cost airline routes, or motorway and train-links can radically change the accessibility of a heritage site.

• Quality of the cultural offer: This exists at two levels. The significance of the site to society, and the quality of the ‘visitor offer’.
  • Significance: The significance and importance of a site is a difficult entity to define. Sites have significance at multiple levels such as local, aesthetic, regional, and national. Of course, as with so many elements of the dynamic impact context the significance of cultural heritage sites is not a static element, it can change over time. It can change because of changes in the political system, technology, etc. Even at a single point in time a site may hold alternative significance to different elements of the population – this can determine who visits a particular site. For example, the post-
World War II cultural heritage from Eastern Europe is seen by many from the old Communist Bloc countries as symbols of Communist oppression and is being rapidly destroyed and erased from the cultural landscape. To many academics especially, this rapidly vanishing heritage is an important historical resource that requires preservation.

- **Quality of the visitor offer**: The quality of the visitor offer at a heritage site or experience can be determined by a number of factors such as the level of preservation, which lies outside the scope of the heritage site, however, site maintenance, level of restoration and visitor facilities tend to fall within the potential control of a site, finance depending, as can the actual or perceived authenticity of the site. Contemporary Western society is a consumer society. In this society the public have been exposed to progressively more sophisticated products, services and marketing, and as a direct result they have become much more sophisticated consumers. It is these same consumers who visit heritage sites and they will judge those sites accordingly. Facilities and services at heritage sites need to be at a standard commensurate with contemporary consumer ideals otherwise sites risk alienating many of their visitors.

- **Scale**: Scale can act as a guide to the potential impact of a cultural heritage site (although, no more than a guide). Larger sites have the potential to induce a greater impact than smaller sites, because of their ability to support a greater throughput of visitors, sustain larger potential capital costs, higher staff requirements and other running costs. Of course, concentrations of smaller heritage sites can have a similar effect.

These factors have a strong influence on the site and feed into the management decision-making context. Furthermore, it is argued that contextual factors are immensely important determinants of the socio-economic impact of heritage sites. Placing a heritage site in context will guide what impacts that should be evaluated. For instance, there would be little point in doing a full, and often costly, economic impact analysis of a small museum based in a large city that was designed to serve the local community and foster local cultural identity. In such a context impact assessment may be aimed at issues of community integration and social inclusion, etc.

### 1.6 Heritage management decision making

The quality of the heritage management decision making will have a strong influence on final impacts. Many impact studies either ignore this or treat it as a black box. The principal components of the management decision making element include: operations, financial, marketing, human resource management and organisational culture, and technology strategy.

- **Operations**: Operations management considers how resources such as capital, people, information and materials are converted into outputs such as services, and information (products). Cultural heritage site operations management is made more complex by the lack of funds.

- **Financial**: The cultural heritage sector is perennially short of funds. Increasing competition for central funds, increasing operational costs, and an increasing number of heritage sites makes this situation unlikely to change. The management of financial resources within heritage sites is crucial.

- **Human resources**: The effective management, training and motivation of personnel within heritage sites are other factors that can influence impact. This affects all levels within a site from management to voluntary staff. The drive and determination of heritage site managers is crucial to the long-term success of sites. With funding being such an issue in the sector, financial incentives for high-end managers are poor and considerable reliance is placed on the dedication, and devotion of managers in the sector. Correspondingly, heritage sites often have highly qualified staff with postgraduate qualifications who are paid correspondingly less than in other sectors. This situation requires careful management. Furthermore, many heritage sites increasingly use voluntary labour to
support many functions in the day-to-day running of sites. This also requires careful management. Human resource management issues also exist beyond the level of the site. For example, the decline in skilled crafts persons capable of maintaining and preserving heritage sites could have long-term implications for the sustainability of some sites.

- Marketing: The marketing strategy will influence the number and type of visitors which determines key final economic impacts. With often limited marketing budgets, a key marketing strategy will be the extent that sites can leverage advertising and promotion by combining with other interested partners in joint marketing campaigns.

The increasing number of undergraduate and post-graduate courses, and academic books devoted to heritage marketing suggests that there is a growing awareness of the critical nature of marketing in the cultural heritage sector. Furthermore, the growing number of heritage special interest groups in the marketing sector further reinforces this trend.

This raises the need for regular impact reports based on efficient accumulation of relevant data to feed back into strategic decision making and influencing future investment decisions. For example, few sites have a detailed breakdown of their visitor profile. Not only is this useful impact data but it can enable more targeted marketing strategies to take place – further enhancing desired impact. This presents socio-economic impact as a dynamic rather than static notion.

- Technology strategy: For a review of technology strategy at heritage sites see Chapter 2 in this volume.

1.7 Strategic choice and implementation

The quality of leadership and strategic thinking not only defines the mission and objectives but sets the visions, makes the key directional choices and innovations, and implements and manages strategic change. The key questions to any heritage site needs to answer are:

- Where is the site positioned now?
- Where does the site want to be positioned? and
- How can that be achieved?

This last question is where management decision-making comes to the forefront of site strategy (see Figure 8).

1.8 Socio-economic impacts and outcomes

Having identified from the holistic model several influences on the socio-economic impact of cultural heritage sites, it is necessary to consider the various possible impacts themselves and the process of undertaking and framing an impact evaluation. The impact component of the holistic model is further developed in Figure 4 below.

Although it is beyond the scope of this paper to evaluate different impact methodologies each impact category (e.g. economic, social, environmental, etc) poses complex methodological problems in capturing and measuring impact. For example, with economic impact one can choose from a wide menu of methodologies including conventional visitor expenditure analysis, econometric modelling (to capture indirect and multiplier effects), cost-benefit

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4 There is a widespread lack of traditional craft skills in certain parts of Europe. The increasing use of modern building techniques and materials has reduced the need for traditional craft people such as stone masons, thatchers, plasterers, etc. And it is not only ancient buildings that are affected by lack of relevant skills. The Big Pit mining museum in the Blaenavon World Heritage site in South Wales now has to consider how the underground mine workings that closed in the mid-1980s will be maintained in the future. This is because collapse of the coal mining industry in the UK has resulted in a lack of properly trained mining engineers in the UK.
analysis, contingent valuation techniques (CVM), contingent choice, hedonic pricing, travel cost methods, and benefit transfer. Naturally each methodology has strengths and weaknesses and very different resource implications for heritage sites as well as requiring different levels of expertise to carry out the impact analysis. As this problem applies to all impact dimensions (i.e. social, educational, etc) it is important that a heritage site manager is clear on impact measurement priorities and the purpose of the study. If the primary purpose of a heritage site is to deliver educational benefits and community learning it is unlikely that a full economic impact study would be needed. The mission and objectives of the heritage site and the priorities of relevant stakeholders (e.g. criteria for releasing finance from funding bodies) would be main pointers for the appropriate type of impact evaluation to be undertaken.

Current market conditions now dictate that few decisions are taken in the field of cultural heritage without considering economic questions. This has caused unease with many in the cultural heritage field. Many commentators have expressed concern that the increasing use of economics as the lingua franca of heritage conservation could undermine the ‘cultural’ rationales for conservation in favour of purely economic arguments. There has been a call from many in the cultural heritage field for a better balance between “economic, cultural and other values” (de la Torre and Mason 1999: 3). A framework such as the one shown below has the advantage of allowing all potential impacts of a cultural heritage site to be expressed.

The study of economics revolves around the concept of value. According to socio-economic theory, cultural heritage is a consumable good. It is also a public good or quasi-public good. Public goods are defined using the following two characteristics:

- **Non-exclusive**: These are goods where a user cannot be stopped from ‘consuming’ that good.
- **Non-rival**: Goods where the quality of consumption by one user is not reduced by other users enjoying it simultaneously.

There is a traditional tendency to undersupply this type of good, because the benefits are not captured through conventional market mechanisms.

In reality, many cultural heritage sites are quasi-public goods, because access to some heritage buildings and museums is restricted. Furthermore, cultural heritage sites are non-rival to varying degrees. For example, some cultural heritage buildings and sites can become overcrowded and congested, thereby reducing the user satisfaction of visitors (i.e. Maddison and Foster 2003).

It is immediately clear, when assessing the sector that a wide range of values can be attributed to cultural heritage sites. These can be precise values, such as the cost of admission to a site, or the cost of a book in the gift shop. These sorts of values are easily accessible to traditional economic modelling techniques. There is also a class of more amorphous values (non-market or non-monetary values), such as the ‘satisfaction’ derived from visiting a cultural heritage site, or the aesthetic value of a cultural heritage site to a local community.

Because cultural heritage goods and services are not usually traded in conventional markets, the benefits derived from these goods and services are ‘external’ to the market. The economic valuation of non-market cultural heritage goods and services attempts to ‘measure’ individual’s preferences for non-market goods and services. If monetary estimates are made of an individual’s preferences for such goods and services, these can be integrated into an economic format comparable to conventional economic costs and benefits. This will enable impacts generated in the sector to be accounted for in policy and decision making processes.
Figure 4: A socio-economic benefit and impact model (modified from The Outspan Group 1999: 7)

Because these values are not captured in traditional economic markets, and individuals do not pay money to acquire them, they are considerably more difficult to define and quantify, but they are part of the overall value of a cultural heritage site. The challenge of quantifying the socio-economic impact of cultural heritage sites emanates from the need to incorporate all these quantitative and qualitative values in its results.

1.9 A socio-economic impact framework

It is clear that, despite advances in the use of non-market valuation techniques in the last two decades, there is still a lack of coordination regarding how to classify the benefits of cultural heritage sites. There is increasing agreement on the types of values associated with cultural heritage sites, but there is no widely-used typology or classification system that can be applied to these impacts.

In Canada, considerable work has been devoted to developing just such a framework – one that can integrate the various forms of economic and social values derived from cultural heritage sites (The Outspan Group 1999). Using this work as a basis, the socio-economic framework seen in Figure 4 can be applied to the cultural heritage sector (see McLoughlin,
Sodagar, and Kaminski 2006: 43-57). The framework allocates the impacts of cultural heritage sites to four different groups. These groups are the individual stakeholders, businesses, society in general, and the environment. The framework includes traditional economic impact analyses which cover consumption and investment expenditure and the multiplier effects, and direct user benefits (e.g. existence benefits), and societal benefits (e.g. cultural identity and educational benefits). Because of this, almost all of the impacts associated with cultural heritage sites can be inserted within one of the categories. This type of framework has been widely applied to various cultural goods in North America (The Outspan Group 1996, 1998a, and 1998b).

However, the framework was developed to be applied broadly to the arts and culture sector. The authors note that “while the concepts presented in the benefits framework can apply to the entire sector, there is also recognition that individual sub-sectors will require more detailed specification of the framework or its adaptation in order for it to function effectively” (The Outspan Group 1999: 11). The following application of the framework has been modified specifically for the cultural heritage sector.

1.9.1 Individual impacts and benefits

The individual stakeholders have an impact on the cultural heritage sites through their use of the site.

Use value

These use benefits and impacts can be direct, indirect, and future use.

- **Direct use impacts**: Are those created by individuals using cultural heritage sites (these would be called ‘consumers’ in traditional economic theory). A visit to the Parthenon in Athens, would be an example of a direct use of a cultural heritage site. Such direct use values may be accessible to market analyses such as visitor numbers or ticket sales. Direct impacts in the technological field could include interaction with technology at a site such, as touch-screen displays and other audio-visual technology.

- **Indirect use impacts**: Are those derived from individuals making an indirect use of a cultural heritage site. As such these impacts do not require an individual to physically visit a site. Reading a book about the Parthenon would be an example of indirect use. Indirect impacts in the technological field could include viewing Web sites for cultural heritage sites.

- **Future use impacts**: Are derived from individuals who know that they will be visiting cultural heritage sites in the future. These values have different implications depending on the perspective. An individual may gain a degree of satisfaction from the knowledge that they will visit a site, but the sites themselves will also gain future visitors, or future use. These sorts of values can only be determined through surveying a population.

The differences between direct and indirect impacts are not always clear-cut, and are often dependent on the perspective taken. For example, reading a book about the Parthenon could be an indirect use of the cultural heritage site, but could be a direct use of a heritage publishing house, or a cultural heritage industry. This could lead to double counting of duplicated direct and indirect benefits. This has led many to ignore these indirect values in summary frameworks.

Non-use value

Non-use values refer to benefits to a person who has not visited a site but still values its preservation. Frey and Pommerehne (1989) identified a number of non-use values that individuals may attach to cultural heritage. These include option, existence, bequest, prestige, education, and altruistic benefits.
• **Existence value**: is valuing the site for preservation even if no one visits it. Existence benefits are derived from individuals who are content that cultural heritage sites are available for others to enjoy.

• **Bequest value**: benefits are derived from individuals who gain value from the fact that cultural heritage sites will continue to exist for future generations to appreciate.

• **Altruistic value**: closely related to existence and bequest values, Ready and Navrud (2002a: 7) add another value called altruistic value, where an individual or group gains value from a site in knowing others can enjoy it.

• **Option value**: option benefits are derived by individuals who gain value from the fact that cultural heritage sites are available for potential future use.

• **Prestige value**: refers to the prestige a community derives from the site.

### 1.9.2 Economic impacts and benefits

Economic assessment of business benefits has been the traditional method used to support the need for funding cultural heritage institutions. These benefits are the result of spending within the cultural heritage environment which would not have occurred had the site not been there.

These are the changes in a defined community that are caused by spending attributed to a cultural heritage site or event. In the defined study economy the value of imported goods and services, and payments which do not remain within the defined economy are removed. Net economic impacts tend to result in smaller ‘multiplier’ values. This value is the actual value added that is kept by the defined economy. The net economic impacts derived from expenditure impacts:

• Spending by visitors or users, who are not from the study area, in the cultural heritage site.

• Spending by the cultural heritage site that uses funds which originated outside the study area.

The increased business benefits can include: numbers of visitors and tourists, more guest house and hotel rooms occupied, retail sales, restaurant use, use of public transport, employment, etc.

These business benefits can be captured using surveys of users, visitors, etc, in conjunction with financial data about funding and expenditure at the site. The type of economic impact model deployed will be crucial for the determination of net impacts. Various economic impact models calculate different impacts – it is important to consider the methodology used and its comparability with other economic models. For example, while most consider direct and indirect impacts, some also consider induced impacts.

### 1.9.3 Social impacts and benefits

There is considerable debate as to whether the benefits to society can and should be quantified in monetary terms. Commentators such as de la Torre and Mason (1999: 2) have expressed concern that “by focusing narrowly on money, price and financial returns on investment, we lose sight of a whole universe of values that should be important to us, as members of society and as individuals.” This sense of unease is shared by Smith (2002: 16) who wonders “Can we put a price or assign a number to memory, identity, a sense of place, or cohesive communities?”
The benefits of cultural heritage sites to society are considerable, but not all of these benefits have associated methodologies for their measurement. Of course, in some cases heritage sites may have a negative impact (see Figure 5).

### Environmental impacts and benefits

Few such frameworks have tried to include environmental impacts in the assessment. A point brought home by Klamer and Zuidhof (1999: 33) who note that:

“studies tend to overestimate the economic impact, since they usually leave out the negative effects of cultural projects (traffic congestion, the loss of economic value due to regulation) …”

Environmental impacts are an important area to study for any impact analysis even though many of these impacts are potentially negative. Environmental impacts can be evident either
within a cultural heritage site (intra-site impacts) or in its immediate locality (inter-site impacts). These include:
Intra-site impacts

- **Site degradation**: Too many visitors can cause physical damage to the fabric of a site because of erosion through excessive foot traffic or changes to humidity caused by visitor’s breath (e.g. the prehistoric caves at Lascaux, France and Altamira, Spain).

- **Site congestion**: Too many visitors can cause congestion within a cultural heritage site, reducing the quality of the experience that is provided because of queuing, noise, and inability to view the exhibits, etc (Maddison and Foster 2003).

Inter-site impacts

- **Pollution**: Increased visitor numbers can cause wider pollution through increased transport use to gain access the site.

- **Congestion**: Increased visitor numbers can also lead to congestion in the locality of cultural heritage sites which can affect the quality of life of local residents.

- **Sustainability**: In some cases heritage sites can have a beneficial impact on the environment, where induced economic impacts cause an improvement in the environment and facilities in the locality of the cultural heritage site.

Environmental impacts can be measured and costed. These costs can then be integrated with the other impacts from the individual, economic, and social domains.

1.10 Conclusions

Although an increasing number of socio-economic studies are being conducted at cultural heritage sites, these tend to focus on specific impact dimensions. This model offers a holistic framework for analysing socio-economic impact of heritage sites. It presents impact as a dynamic concept and provides a typological basis for analysing impacts. There are a number of uses for this model:

- Such a holistic approach will provide a useful basis from which heritage managers can conceptualise socio-economic impact.

- If managers can begin to see how various elements come together to influence impact they can increase their understanding of heritage impact and this could form the platform from which site managers can influence positive outcomes.

- By looking at sites using the same criteria the models allow managers to compare sites.

Most importantly the results from the holistic site model can be used to provide contextual data to feed into the ICT model shown in the next chapter.

References


2 Understanding the socio-economic impact of ICT at heritage sites

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The following methodological model can be used as a platform for the study of the impact of information and communications technologies (ICT) at cultural heritage sites. The model has been developed through extensive, in-depth interviews with curators, directors and stakeholders at many cultural heritage sites across Europe. The underlying strength of this model is its versatility. Although the model is oriented towards the investment in, and deployment of, ICT at heritage sites it is fundamentally about understanding the process of investment and so could be modified for many investment decisions.

2.1 Introduction

The holistic heritage site-level model (see Chapter 1) provides a wider context to understand the impacts and outcomes associated with cultural heritage sites. The impact of an ICT deployment on heritage sites and their visitors is an incremental impact. That is to say it is an impact that occurs in addition to, and as part of the wider impact of the site. Therefore, any changes to the dynamics of the site could affect the impact that an ICT deployment has.

ICT does not exist in a vacuum divorced from the heritage system. ICT is part of that system. The incremental impact of an ICT deployment cannot be viewed in isolation from the non-ICT impacts and outcomes associated with a particular heritage site. The success or failure of a particular ICT project is, more often than not, a function of factors outside of the realm of IT. Politics, design, and location amongst others play an important role in the success and failure of an ICT deployment. The success or failure of a project determines its socio-economic impact as much as the technology itself. It would be a gross simplification to think that technologies can be studied in isolation from these external factors.

This is why the first model that has been developed (the holistic model) seeks to understand and conceptualise the dynamics of the heritage site being studied. This model provides a site ‘context’ for the following model which is specifically oriented towards the deployment of ICT (see Figure 7).

Also, when studying the ‘impact of technology’ it becomes apparent that any analysis is meaningless without consideration of what makes each site unique. Different sites have different strengths and weaknesses – strong brands, exceptional collections, extensive financial resources, etc. Different sites also have different rationales and objectives for deployment. If the ‘impact’ of ICT is divorced from these contextual factors then the result of any analysis can lose its full potential. This is why the model is so essential. It allows those studying sites to place them in the same conceptual framework (McLoughlin et al. 2006a, 2006b).

This research is based not only on examples of ‘best practice’ but the analysis of examples of failure. As much, or more, information can be derived examples of technology failure as from the examples of success5.

5 Of course, examples of failure are more difficult to acquire because those involved are less likely to want the information disseminated because it could reflect badly on them or their organisation. In contrast, examples of success are widely disseminated in the literature, at conferences, etc.
2.1.1 The technology impact context

Changes to the non-technology elements of the heritage site and its wider context can have wide ranging effects on the impact and outcomes of an ICT deployment. Considerable resources are devoted in the holistic site model toward determining the wider impact context that a heritage site exists in. The information derived from the holistic site model can be applied to this element of the ICT model. In this element the ‘macro technological’ context is also studied in order to establish how this affects the deployment of ICT. A number of factors affect the technological impact context, including:

- **Development of ICTs**: The ICT deployment in heritage sites exists within a wider ‘ICT and technology’ context. At the most fundamental level, what ICT is available is dictated by developments in the spheres of science, industry and commerce. Heritage sites do not have the resources or expertise to drive change in ICT. But the availability of ICT is the principal determinant of what can be achieved.

- **Cost of technology**: Global economic forces have acted to drive down the price of ICT hardware and software. This contextual factor affects both heritage sites and their visitors:
  - Lower costs have made ICT technology more accessible to heritage sites which do not tend to have buoyant finances (the increasing use of touch-screens and large LCD screens at heritage sites is an obvious manifestation of this).
  - ICT has become a commodity item in society. As more consumers have to opportunity to have increasingly sophisticated ICT in their homes, more people are becoming familiar with technology. Furthermore, many visitors will have access to technology in
their workplaces. Visitors are therefore becoming increasingly familiar with ICT and so the accessibility has increased. This can also lead to increased acceptance of technology (see below). The visiting public are driving demand.

- **The acceptance of technology:** The acceptance of technology is determined by socio-economic factors. The widespread use of ICT is the result of complex interactions between economic forces and user needs. Acceptance of such technology is often dictated by the penetration of ICTs in society (the internet, digital TV, mobile phones, PDAs). Acceptance of technology is relevant to both the site visitors and the site interpreters.

- **Reliance on exiting technology solutions:** Some ICT technologies and standards are well-established (the Internet, PC hardware, HTML, XML, etc), but others are still in the process of gaining market acceptance. Sites with potential ICT deployments that rely on cutting edge/bleeding edge technologies/standards could run the risk of the technologies used failing to gain long-term market success, however, if successful these sites could have a market leading advantage. Deploying technological solutions at the appropriate time is crucial).

2.1.2 **Strategic rationale for technology investment**

There has to be a strategic rationale for technology investment. This is usually closely linked to the mission and vision for the site. Strategy needs to underpin the management decision making at a heritage site. Two principal components are suitability and feasibility:

**Vision**
*Vision for investment:* All investment decisions usually involve some intended innovation to enhance the cultural product offer. The vision is eventually a strategic view of where the site should be and what it should offer. Once this is clearly defined the exploration of the appropriate ICT for the vision can take place.

**Suitability**
- **Strategic logic:** there must be a strategic logic for the deployment of ICT. At its simplest a heritage site’s strategy revolves around three questions: where is the site positioned now, where does it want to be positioned and how will it achieve that goal. An ICT-based solution may, or may not, be the most effective use of resources for achieving that goal. There have been many examples of technology-led solutions that have been deployed at heritage sites for no other reason than the technology was available.
- **Site mission:** another key question is does the particular use of ICT fit with the mission and values of the site? It is crucial that the deployment fits the mission and values of the site. For example, the type of ICT deployed at a site whose primary aim is education might differ from one where visitor numbers are required to support the revenue stream.
- **Stakeholders:** all investments involve opportunity costs. The potential funds that may be devoted to an ICT project can alternative uses. It is therefore essential that stakeholders support the deployment of resources.

**Feasibility**
- **Risk assessment:** The installation of ICT can hold considerable risk for heritage sites. For many it is an area beyond their traditional sphere of experience so they are reliant upon external sources of consultancy and services. A typical risk factor is cost outweighing the benefits
- **Budget:** Sites have to consider if they have the budget for ICT installation and maintenance and/or the resources and capability to support such an installation.
- **Resources and capability**: The introduction of ICT requires numerous new skills. Heritage sites need to establish what resources and capabilities they have for such a deployment. Do they have any skills in house or will the entire project (or part of the project) need to be outsourced? Furthermore, ICT requires maintenance. Hardware which requires a high level of manual interaction such as touch-screens, trackballs, and keyboards all require upkeep. Purely electronic hardware such as processors, motherboard batteries, disk drives, can all fail. Bespoke software may have bugs. Sites have to allow for these contingencies and set aside resources at the outset for maintenance.

### 2.1.3 Management decision making

The management decision-making element is another key component that influences impact. There are three components within this element; technology management, the financial and business models, and the marketing strategy.

#### Technology strategy

Cultural heritage sites should have a continuous review of technology strategy (e.g. Web strategy) that can support the cultural offer.

#### Technology management

Technology management is a multi-faceted area:

- **Technology project management**: There are numerous considerations to be made when managing a technology project. For example does the project meet the heritage site's vision? Is there a clear objective? As Soren (2005: 143) notes “clear objectives and values help curators take ownership of a project, and feel responsible for whether it succeeds or fails.” It is necessary to liaise with external partners and with internal players (i.e. using human resource management for managing change). Not all heritage sites have the luxury of having full-time staff devoted to ICT management. Some have to share IT staff between sites or have staff that do IT-related tasks in addition to other jobs. These sites may have to purchase these skills from outside consultants. If the heritage site is for some reason unable or unwilling to maintain their ICT deployment then its impact may change from a positive to a negative. Furthermore, deploying ICT at a heritage site is not the end of the story. Information technology, as with all technology requires maintenance. Many sites do not have the skills to keep ICT projects running if the technology breaks down. This of course then requires external consultancy to fix any problems – but, needs to be factored into the running costs of the original business and sustainability model. The following factors are also integral with technology management:
  - **Management 'buy-in':** Much work has been conducted in the commercial business sector that shows that the lack of senior management buy-in is one of the biggest reasons for the failure of technology projects. This is extremely important in the cultural heritage sector because there can still be reticence to the use of information technology in what is still a sector with traditional origins. Without management buy-in projects could fail before deployment or could have insufficient resources for successful deployment, leading to negative impressions by visitors.
  - **Leadership**: Closely related to the above is leadership. Leadership for an ICT deployment at a heritage site exists at two levels; the strategic leadership that drives the overall conceptualisation, and the IT project leadership that manages the actual day-to-day running of the project. Strong strategic and project leadership can greatly enhance its chances of success.
  - **Design, installation and implementation**: When visitors come face-to-face with front-of-house ICT at heritage sites their first impression is a function of the design, implementation and installation of the technology. The design of ICT applications is a
complex area that is usually beyond the experience of heritage site personnel because so many different skill-sets are required (ICT development, graphic design, ergonomics, etc). As heritage sites have become more likely to deploy ICT to enhance the visitor experience this has created a market opportunity for organisations who design and install ICT solutions (and those who co-ordinate the various project specialists). Although, even today few enterprises can rely solely on the heritage sector for their business. Still heritage sites deploying ICT are now making a contribution to the business sector.

- The quality of the implementation drives the potential impacts: An exceptional use of technology can be let down by poor design, location, and implementation. Alternatively, lack of funding may result in poor design because shortcuts were made. This is important because considerable evidence points to cultural tourists as being increasingly sophisticated visitors. This does not imply that all visitors to heritage sites are classified as cultural tourists, but there is a tendency for museum and heritage site visitors to come from higher education backgrounds.

Financial and business models

- Financial/business models: In the past many heritage sites have been caught out by the lack of coherent, sustainable business models. Capital funds and grants have been devoted to projects but less consideration has been devoted to the sustainability of the project. There is evidence that this is slowly beginning to change – many funding bodies now require evidence of sustainability and business planning before they grant capital funds to projects. For example, in the UK funders such as the Heritage Lottery Fund and English Heritage now require sustainability plans for the projects they fund. There are numerous considerations for financial and business models, such as charging for specific exhibitions, developing exhibitions with the potential to tour and so gain extra revenue, or more imaginative models such as sharing development costs in return for a percentage of the revenue.

Marketing strategy and target audiences

- Marketing strategy: ICT deployments do not exist outside of a business system. If visitors are not motivated to go to the physical or virtual heritage site in the first place then the impact of the ICT deployments can be reduced. A significant investment in ICT might form the basis of a marketing campaign. This certainly increased the awareness and therefore had a considerable influence on the scale of the impacts and outcomes.

- User evaluation and research: Heritage sites have a long tradition of conducting research on their visitors to determine user satisfaction. Visitor surveys or interviews are and well understood by heritage sites. There is also considerable external consultancy available to sites. There is therefore a well-established mechanism that heritage sites can use to determine the socio-economic impact of technology at heritage sites. Furthermore, user evaluation can be used to support marketing research.

2.1.4 Specific objectives and appraisal of the technology investment

Purpose of technology investment: This is fundamental for understanding the impact of ICT. ICT investment reflects cultural product innovation and can provide a basis for a ‘new offer’. There can be a wide range of reasons for the deployment of visitor-facing ICT at heritage sites. These can include:

- Enhancing the user’s experience

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Although, to date very few sites have targeted the incremental contribution to the user/visitor experience caused by the use of ICT.
• Increase visitor numbers
• Increasing accessibility
• Enhancing educational impact, or
• Some combination of the above.

A key question that sites often want answered is ‘has the investment achieved this aim?’ The objectives of a project are key to determining what impacts should be assessed.

• Type/use of technology: The purpose for a technology investment is a key determinant for why a specific technology is chosen? This of course is tempered by the anticipated costs and benefits of such a deployment. The type of technology chosen is crucial for impact assessment. Different technologies have different potentials for impacts and outcomes. Technology that is connected to the internet may have a greater impact because of the potential for access to a larger number of people. Site-based visualisations may have a considerable impact to the visitors, but this may not be translated to a broader impact because of the localised nature of the impact.

• Anticipated costs and benefits: This is the essence of appraisal. The initial capital cost outlay can be estimated as can the potential social returns and benefits. The anticipated costs may be assessed through the use of Return On Investment (ROI), and Net Present Value (NPV) calculations. It is essential to consider both the capital and operating costs for a deployment. These assessments can then be compared to the potential anticipated benefits that the use of ICT may entail. Once a project is running the impact measures can be used to provide data on the actual return.

2.2 The strategic context for effective deployment of technology

Strategic decision making and effective implementation drives a heritage organisation to achieve its mission, objectives and its desired impacts. The following conceptualisation of the model shows how the three elements of heritage site strategy are encapsulated within the model – leading to the creation of a heritage strategy triangle (see Figure 8).

• The ‘site impact context’ provides information on where the site is currently positioned.
• The ‘strategic rationale for the investment’ in technology is the key indicator of what the site wants to achieve.
• The objectives and the management decision-making are the areas where sites can work on achieving their goals.
• In this strategic context the socio-economic impacts and outcomes validate the strategic decision-making framework for the heritage site. These impacts can be used to verify if the objectives of a strategic change have been met. They are integral part of a holistic management information system which can be used to determine which strategies work and which do not in the heritage site context.

2.3 Conclusions

The above model highlights the limitations of assuming a simplistic relationship between deploying technology and its impact. It is apparent that many factors influence social and economic impacts simultaneously with any technology impacts. The break down of the model into elements allows users to conceptualise the process of investment. This way of thinking could be called ‘heritage systems analysis’. This is to say a consistent theoretical model for heritage sites that allows the internal and external factors that influence impact to be conceptualised. If the heritage sector were to understand how various components of the
system are interlinked and affect impacts and outcomes then this could become the basis for *understanding* impact. In this context understanding impact becomes the basis for positively *influencing* impact.

![Figure 8: The 'strategy triangle' in the holistic ICT decision-making model](image)

The underlying strength of this model is its versatility. Although the model is oriented towards the investment in, and deployment of, ICT at heritage sites it could be modified for many investment decisions.

**References**


3 Meaningful constructs of identity: a consumption model for heritage

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Heritage sites and their surroundings have the ability to become important symbols in society. They can serve diverse meanings for their visitors. They also have the ability to offer a sense of identity for visitors, be it individual or collective. A methodological model for heritage consumption is proposed here, to show how identities are constructed by experiencing assets of heritage and in the context of everyday life.

3.1 Introduction

Heritage sites and their surroundings have the potential to become important symbols in society. They can serve diverse meanings for their visitors. They can also offer a sense of identity for visitors, be it individual or collective. People make these connections in any number of ways, and for some, heritage sites also become important possessions for people by emanating a sense of ownership towards them (Crouch 2000). A methodological model for heritage consumption is proposed here, to show how identities are constructed by experiencing assets of heritage and in the context of everyday life. These assets of heritage may be made up of natural or man-made components and possess tangible and intangible features. They may consist of actual physical remnants from our past or simulated representations of heritage assets that have been lost or destroyed over time. In either case these representations of heritage can have similar impact and appeal for the visitor.

The theoretical concepts applied to the model draw from the fields of heritage and tourism and are viewed from an anthropological perspective. Contemporary representations of heritage and its consumption are therefore aligned with theoretical notions that underpin pilgrimage, rituals and rites of passage. These notions borrowed from anthropology demonstrate how representations of heritage construct meaning. It also underlines the relevance of meaning making in seemingly everyday activities, such as visiting a heritage monument, site or museum. This model provides a tool for how heritage might reflect upon itself and its own power in contributing to the construction of meaning and identity in everyday lives.

3.2 Identity construction in heritage

At the core of the heritage consumption model proposed here is the construction of identity. It offers that identity is constructed in three areas: as an individual; as part of a social group (collective identity); and through a sense of nationality. Each of these areas provides a foundation for which a sense of identity is constructed through consuming heritage either on their own or combined.

In applications of social theory, there is theoretical overlap in how identities are formulated and discussed from an individual and collective sense (Mead 1934, Hall 1996, and Jenkins 2004). There exist inherent complexities underpinning the concepts of how identity is constructed. For many heritage sites however, they are engaged in relating to representations of identity. These representations of identity are displayed through symbols of a society’s culture, imagined and real. These representations may be physically located within museums, a landscape or a landmark monument, and then followed by mental constructions of meaning through their consumption by visitors. The practice of acknowledging them may be done so by visiting them, thinking about them and gazing upon them. Tajfel’s (1972: 31) theory of social identity offers, “the individual’s knowledge that he/she belongs to certain social groups
on national identity, Clarence (1999: 201-2) details the influences that contribute to a sense of identity associated with a nation. These can be things such as governments themselves, education systems, even policies relating to foreign affairs and trade programmes. Each may be represented through displayed heritage, and accordingly for Clarence (1999: 200), national identity is “intrinsically linked to how the nation itself is constructed” through the things it values. Abrams and Hogg (1990: 3) draw on the Olympic Games to demonstrate how “the desire to experience (national) social identity positively” contributes to the enthusiasm shared among countrymen for its fellow competing citizens. Popular displays of heritage have the ability to do the same, such as the symbolism of Uluru Rock to Australians or Stonehenge for the British. For Billig (1995: 8), possessing a national identity thus involves “being situated physically, legally, socially, as well as emotionally…it means being situated within a homeland”. Heritage assets are places where such things may be practiced and recognized.

Another element core to forming identity is a sense of place. For Crouch (2000: 64), place can be understood as “something through which and with which lives are lived and identity and myth made”. Heritage can be represented through place, imagined and real. Crouch (2000: 74) states that people can “develop a sense of ownership in places that is not legal or financial but developed in terms of feeling, empowerment, attachment and value”. Equally relevant is relationships built with sites representing dark heritage, such as sites of the Holocaust, cemetery and prison sites also visited by tourists. Significance and value is similarly attributed to these sites, yet it need not have a positive impact on a visitor or tourist. Heritage representations, whether made up of actual or simulated elements, may be either pleasant or painful in their meanings. Thus, the potential for powerful representations of heritage becomes more apparent. As such, these representations of heritage can be used to leverage meanings for people, and construct a sense of identity from them.

3.3 An anthropological application in heritage

It is the integration of community, symbols, culture and its meanings that lie at the foundation of anthropological study. The inherent value that people attach to these things is at the core of the discipline of anthropology. The model of heritage consumption proposed here forms a bridge between concepts rooted in anthropology and meaningful constructions found in heritage.

In anthropological studies of tourism, pilgrimage features as a dominant motivator to many different sites (Graburn 1989, Badone and Roseman 2004). The discourse underpinning pilgrimage as a social activity almost exclusively focuses on traditional religious applications. Those that are more secular in nature are acknowledged less frequently. Digance (2003: 143) states that although European medieval pilgrimage reached a peak of activity as far back as the thirteenth century, more recent discourse indicates that pilgrimage is “still as popular as ever, [and] experiencing a marked resurgence” in the last few decades. For example, as recently as 1993 the shrine of Saint James at Santiago de Compostela, Spain, drew between 4.5 and 5 million visitors (Murray and Graham 1997), yet it is not known how many have done so for purely religious reasons. As Frey (2004: 91), notes the pilgrims to Santiago “are often on the road for a host of cultural, spiritual, athletic, and personal reasons”. More modern practice might indicate a journey to a site “that is revered and sacred within their own individual cosmology or belief system” (Digance 2003: 144). Similarly for Osterreith (1997), some of the intrinsic rewards of engaging in modern practice of secular pilgrimage are not unlike traditional, religious pilgrimage in searching for identity or spiritual rebirth. Therefore as we can see in these examples religion does not always feature as a prime motivator for pilgrimage. The secular ‘worthiness’ ever present in heritage sites need not be devalued, no matter what their scale. This can apply to heritage displayed at highly revered international sites such as Stonehenge or local community heritage museums, and equally for darker representations of heritage such as Holocaust memorials.
It could be said then that pilgrimage has a growing relevance to heritage sites, alongside broader studies of motivation among their visitors. As mentioned, the discourse of pilgrimage is predominately positioned as a social movement that drew from traditional religious connotations. Pilgrimage has experienced a change in nature through tourism and leisure pursuits (Badone and Roseman 2004), making secular applications more relevant to things like consuming heritage sites.

The varying motivations for visiting heritage sites demonstrate this. Aitchison et al. (2000) note that druids have worshipped Stonehenge for some time, using it as both a meeting place and centre for ritual practice. The site has had similar appeal for New Age travellers, in annual celebrations marking the summer solstice. Even now, followers of the New Age movement tend to gravitate to heritage sites such as this because they have been held sacred by prehistoric and indigenous peoples for thousands of years (Digance 2003). Equally relevant are secular examples of pilgrimage made to more unassuming sites, such as Elvis’s Graceland in Tennessee (Rigby 2001), motorcycling pilgrimages to Washington by Vietnam veterans (Dubisch 2004) and pilgrimages to Star Trek conventions (Porter 2004). This shows a growing alignment of pilgrimage with broader applications to meaningful journeys and for those engaged in them. Hence, the ‘New Age’ visitors to Stonehenge borrow ideals from religious and tribal traditions, in hopes of “following their own spiritual paths outside the parameters of mainstream pilgrimage patterns” (Digance 2003: 154).

British anthropologists Eade and Sallnow (1991) have also challenged the frequency of religious connotations associated with pilgrimage journeys. Rather, they advocate that each journey is unique in terms of its social context and its “historically and culturally specific behaviours and meanings” (1991: 5). Similarly for Morinis (1992: 4-5), pilgrimage is motivated by the pursuit of embodied ideals. He defines pilgrimage as any “journey undertaken by a person in quest of a place or a state that he or she believes to embody a valued ideal”. Representations of heritage have the ability to possess such valued and embodied ideals for people. Comparatively for Coleman (2004), varying forms of engagement with the physical assets of an environment provide meaning in pilgrimage. It is equally important to note that such assets of heritage sites do not always exist in a physical state. For example, the Holocaust Museum in Washington DC houses digitally recorded witness narratives and oral histories (Salvo 1999). These technological representations of heritage possess as much meaning as tangible assets. Indeed, the inherent potential of collective and individual sense of meaning and identity that resonates through heritage is apparent in such instances.

For anthropologist Victor Turner, his studies of tribal societies posit that elements of religion, economy, law and politics provide a cultural domain that is essentially interwoven (1968, 1977). It is then the collection of symbols, rituals, and religious beliefs among these elements that bring them all together (Turner 1977). In effect, the same is applied in contemporary representations of heritage, as it displays components of these things. For example, as we have seen with sites such as Stonehenge, its symbolism can be consumed in a sacred or secular manner. Symbolic meanings such as this might also be consumed within the oral histories and witness narratives told at the Holocaust Memorial Museum by its survivors. Visitors to such heritage attractions draw from a broad cross-section of motivations, and show that representations through tangible assets and technological applications are of equal relevance in heritage. We are starting to see then, how the practice of heritage consumption resonates with anthropological study of society.

The links do not end there. Although a pilgrim journey does eventually come to an end, Turner and Turner (1978: 15) state “it is commonly believed that [the pilgrim] has made a spiritual step forward”. Consuming heritage can offer a spiritual experience to its visitors. Accordingly, Van Gennep’s ([1909]1977) discussion on ‘rites of passage’ also comes into play as they enable a change in place, state, social position or age. Van Gennep’s seminal work on rites of passage has influenced Turner’s anthropological studies of ritual (1969) and pilgrimage (1978). Such theories are indeed relevant in contemporary practice of visiting heritage sites through tourism or otherwise. This is typified in Graburn’s view (1989) of
secular journeys in that pilgrimage is mediated through tourism. For Graburn, journeys become sacred in themselves because people are searching for a life that is made worthwhile and worth living.

Turner defines ritual as “a stereotyped sequence of activities involving gestures, words, and objects, performed in a sequestered place, and designed to influence preternatural entities or forces on behalf of the actors’ goals and interests” (1977: 183). For Deflem (1991: 5), “[r]ituals are storehouses of meaningful symbols” in which information is revealed and then considered as authoritative in terms of value to a community. Similar to aspects of pilgrimage discussed above, these definitions of ritual do not resonate in purely religious contexts either. If such notions are related to the act of consuming heritage, the visitor does indeed engage socially in the elements Turner and Deflem describe above. Therefore, as the individual consumes heritage, the anthropological concepts applied to their conduct shows how the construction of meaning and identity for the individual occurs.

3.4 Experiencing heritage in the context of the everyday

The preceding discussion acknowledges how meaning is constructed through anthropological concepts and how this is relevant to contemporary consumption of heritage. This section breaks down the context further, by proposing that meaningful acts are experienced and constructed in the everyday context. Firstly however, we must appreciate that the nuance of meanings located in the minutiae of seemingly everyday activities are infinite. There are those such as Shotter (1993) who argue that there is deep-rooted significance in them, and how society constructs meaning from everyday experience as a result. Similarly, O’Dell (2005: 15) states the nature of experience itself can be described as “highly personal, subjectively perceived, intangible, ever fleeting and continuously on-going”. In the model presented here, it is the elements of experience, imagination and landscape that feed the construction of meaning and identity in visiting heritage sites. For example, Aitchison et al. (2000) says that it is the presence of the past within a landscape that is a strong motivator for leisure and tourism pursuits. Drawing once more from the iconic example of Stonehenge as a symbol of English heritage, this Neolithic structure has had a number of theories associated with its meaning, such as those linking it to “a ceremonial place where rituals linked to birth, death and fertility were played out by a society trying to make sense of their world” (Aitchison et al. 2000: 106). Many different people and nationalities visit this site for a host of reasons. Similarly, one of Australia’s best known national icons, Uluru or Ayers Rock as it was formerly known, also demonstrates the power of a heritage landscape in acting as the country’s “geographic and spiritual or emotional centre” (McGrath 1991: 115). Also, as we have seen with the Holocaust Memorial Museum, it is digitally transmitted images and voices of those who have survived that facilitate a sense of the past. In the USA three university libraries and five regional museums developed an online exhibit entitled “Voices of the Colorado Plateau” that show multimedia exhibits displaying historic photographs with oral history recordings that offer an “engaging online museum experience” (Nickerson 2004: 270). Technology has also broadened the scope for facilitating meaningful everyday experience of consuming heritage.

The diverse nature of heritage assets themselves and the equally diverse way in which they are experienced can take on many different meanings for visitors. As O’Dell reiterates, experiences are randomly occurring phenomena “located entirely in the minds of individuals” (2005: 15). Therefore, it can be difficult to categorize the nature of all experiences encountered at heritage sites. For example, Prentice et al. (1998) engaged in an in-depth study of heritage experiences at the Rhondda Heritage Park in South Wales which aimed to determine visitors’ motivational factors for coming to such sites. Due to the nature of the study, it was found that their motivation to visit appeared to be independent from typical measures associated with socio-demographic characteristics associated with age, level of education, occupation and so on. It is difficult then to locate all factors influencing the phenomenological aspects underpinning the motivations to visit heritage sites. However by
focusing on the places and spaces in which heritage is consumed, it sheds light on ‘the why and the how’ in which meaning is constructed by visitors. The heritage consumption model proposed here demonstrates how such processes can work.

3.5 The landscape of heritage

Aitchison et al. (2000: 109) state that “[h]eritage is a powerful force in contemporary society” because it is the things of value that society puts on display. Their worth is articulated through the practice of collecting and observing such meaningful possessions wherever they might reside, such as in a museum or a heritage landscape. Daniels and Cosgrove (1988: 1) state that landscape is “a culture image, a pictorial way of representing, structuring and symbolising surroundings”. Similarly for Rose (1993), the meaning of a landscape draws its significance from the cultural codes assigned to it by society. For Aitchison et al. (2000: 20), it is such codes that “are embedded in social relations and frequently reflected in cultural symbols”. This is because cultural meanings are often built into the landscape in which they reside and also in the structure of the institutions that house their related cultural and symbolic artefacts.

In the past, landscape has been of limited interest from a subjective and socially constructed nature in cultural discussions of geography (Aitchison et al. 2000). This is relevant to how heritage is positioned and approached in broader contexts of its social representation in society. It is indeed landscape and the power of its representations that is of value to conceptualising heritage. For Gregory (1994), landscape can represent a social geography of the imagination. The heritage a landscape symbolises can possess deep roots and wide appeal. Take for example the Angel of the North, a 65-foot steel sculpture in England’s northeast, and is meant to celebrate a long tradition of heavy industry in the area, an industrial heritage that includes coal mining, steel making and ship building that occurred in Newcastle, Gateshead and the surrounding region. It holds a commanding presence overlooking the Tyne and Wear countryside, and symbolises the industrial past of previous generations. Erected in 1998, it has the ability to gain deeper symbolism and wider appeal over time.

For those consuming heritage, the meanings located within real or manmade heritage assets can be of equal value in the eyes of the visitor. Heritage sites offer authentic and inauthentic representations to its visitors in the form of land and buildings, objects, and the images and sounds of multi-media applications (Meethan 2001). Referring to Turner once more, it is the collection of elements within a cultural domain along with its associated symbols, religious beliefs and rituals tied to them that people build meaning from (1977). For visitors to the Angel of the North, paying homage to it could be in time viewed as meaningful pilgrimage for those who go there.

3.6 A consumption model for heritage

Conceptually, a sense of identity emerges from a wide and varied domain of social influences: other people, objects, institutions, places, events, time and space. In the heritage consumption model put forth here, theoretical concepts underpinning identity formulation provide the basis of its foundation (Tajfel 1972, Billig 1995, Hall 1996), yet it is the complexities inherent in each that also reflect the fluid nature of identity construction (Jenkins 2004). Therefore, for the purposes of this consumption model it is proposed that a sense of individual, social and national identity can overlap through and within the process of consuming heritage (see Figure 9).

This centre core of identity construction is then fed through another layer made up of anthropological concepts. These concepts demonstrate that pilgrimage, ritual and rites of passage act as filters through the process of identity construction. Each of these acts can facilitate and feed into one’s sense of identity. Beginning with pilgrimage, this act demonstrates the significance in actually going to a site (i.e. visiting a museum); ritual is then reflective of the behaviour once there (gazing upon heritage displays); and ‘rites of passage’ is
indicative of the transition that takes place with the individual as a result of being there, i.e. formulating a sense of identity (for individuals who are by themselves or by interacting with others).

Next it is the outer most layer of this model in which the components that feed the anthropological elements towards a centre for identity construction. These elements are made up of landscape, experience and imagination and feed through the anthropological elements into the identity core. Landscape may be made up of natural or manmade elements. This can include natural or built heritage, historical objects or simulated environments facilitated through technology such as multi-media. The experience component may include such things as gazing, social interaction among visitors and story telling with each other or with staff of heritage sites. Thirdly, imagination is made up of the mental images facilitated by the visual, social and contextual elements that are constructed through the act of consuming representations of heritage.

Figure 9: The heritage consumption model

The layers of the model proposed in Figure 9 show how the construction of identity and the meanings underpinned in the process are facilitated and mediated through the act of consuming heritage. The heritage being consumed and applied to this model need not be grandiose in scale but rather a visit to a local heritage museum or a national monument can possess equal meaning for visitors. Also, it is through seemingly ordinary everyday activities such as gazing, talking, reflecting and sharing with those that accompany visitors of heritage sites that facilitate the meaningful consumption of it. In essence, heritage has the power to establish, renew or reinforce meanings and a sense of identity for the visitor. For those who manage assets of heritage, there is benefit to being aware of the powerful representations such sites provide, and capitalising on its worth.
3.7 Conclusions

In a geographical reference of landscape, Crouch (2000: 64-5) states that individuals are experiencing encounters “wherever they are, whatever they are doing” and can do so in “a town park, a field, a historic site or a theme park, a pub, club mountain range or a beach”. This is equally relevant to the act of consuming heritage sites. Visitors may consume tangible assets of heritage such as objects, monuments and landscape and also simulated representations of heritage displayed via technology. Each of these representations of heritage possesses equal relevance in their ability to create meaning for visitors. At the Holocaust Memorial Museum it is the digitally transmitted stories of survivors that “can help us become more humane and more aware of our historical positioning” (Salvo 1999: 293). Whether or not it is museums like this or other heritage sites when visitors consume they imagine, remember, forget, hope, discover, and feel sad or frustrated along the way. Turner (1969: 42-43) says that it is the symbolic representations of community that act as “a set of evocative devices for rousing, channelling, and domesticating powerful emotions”. Shotter (1993) notes that knowledge is indeed acquired through how people act; what they practice and how they negotiate their social and cultural relations. In the process, they are able to construct meaning and a sense of identity.

In Porter’s (2004) discussion of pilgrimage to Star Trek conventions, she says such gatherings are clearly not typical pilgrimage sites. On the contrary, they are “places to which people journey in pursuit of collective ideals” (2004:164). Heritage sites are known to offer similar appeal. In the context of ritual, Douglas (1975: 54) says rituals are expressions “of society’s awareness of its own configurations and necessities”. Similarly then, meaningful representations of heritage come from society’s awareness of their worth. Broadening the boundaries of these concepts to encompass meanings found in heritage consumption sheds new light on the secular pursuits of heritage, no matter their medium of representation: the remnants of Neolithic structures, a historic monument, a digital image, or recorded oral history.

Crouch (2000: 67) says the human subject “constantly negotiates the world in terms of relationships, emotions and feeling” as it makes sense of places around him/her. Indeed, assets of heritage aid in such manifestations of meaningful encounters. They also do so in seemingly ordinary everyday ways, such as visiting, thinking and gazing upon heritage. It is such mundane behaviour that need not be overlooked for its significance. It is through act of consuming heritage that individuals find ways to make their own knowledge, and do so by negotiating with the assets before them. In effect, institutions of heritage can benefit from the conceptual framework that is underpinned in the heritage consumption model. It reflects how the symbolism located in heritage is able to create, negotiate and solidify a sense of meaning and identity to its visitors.

References


4 Socio-cultural impacts of virtual heritage in museums: an interdisciplinary analysis

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This paper examines the socio-cultural impacts of the use of virtual heritage exhibits at museums and heritage sites. Virtual heritage is defined as a mechanism for representing the heritage and culture of societies through the use of digital technologies. Although the popularity of digital media reflects their potential for engaging visitors with the museum’s material subject, there is less comprehension of their potential socio-cultural impacts. This is primarily because technology drives their development; concepts of representation, interpretation and cultural identity are less well understood within this technical discipline. It will be argued that the interaction between virtual heritage exhibits and visitors in museums can be described as an experience or process, where multiple interpretations are possible. Furthermore, these might have an impact on the values, attitudes and beliefs of visitors towards their own and others’ heritage.

4.1 Introduction

Increasingly, museums and heritage sites are using digital technologies to assist both the education and entertainment of their visitors. Digital media have considerable potential for communicating the heritage and culture of societies; overcoming some of the problems presented by more traditional means, such as books, artefacts or photographs. Visitor studies (Gottlieb 2005) have demonstrated the potential of virtual heritage for visitors to become more engaged with the heritage material. However, there is less comprehension of the socio-cultural impact of the use of digital technologies as a means of representation of heritage. This is largely caused by the fact that technology drives their development; even though, concepts of representation, interpretation and cultural identity are often less well understood within this technical discipline. Consequently, the full potential of technology is not exploited and its value is often poorly appreciated in the humanities and social disciplines, including those in the museum sector.

To address these issues, this paper aims to explore the socio-cultural impacts of virtual heritage in museums and heritage sites using an interdisciplinary approach. It will propose a link between digital technologies, business, media culture and cultural studies theories in order to conceptualise how visitors engage with virtual heritage representations. It will be argued that the interaction between virtual heritage exhibits and visitors in museums can be described as an experience or process, where multiple interpretations are possible. Furthermore, this interaction might have an impact on the values, attitudes and beliefs of visitors towards their own and others’ heritage. As a result, this analysis could help museums and heritage sites understand the potential benefits of digital technologies in order to achieve aims such as education and social inclusion, which will better position the museum within broader forces of globalisation and multiculturalism.

4.2 The post-museum

The emphasis of the museum and heritage sites focusing on the socio-cultural implications reflects the broader paradigm shift within the sector towards examining their social role (Vergo 1988). Within recent decades, an increasing number of commentators have aligned themselves with new museology perspectives (Hooper-Greenhill 1992, Sherman and Rogoff 1994, Barringer and Flynn 1998, Witcomb 2003). These perspectives call for a move away from traditional or modernist approaches to museums, where the focus has been on removing objects from their original contexts and placing them in the authoritative space of the museum.
The objects were placed in glass cases or ‘cabinets of curiosities’ often arranged according to Western systems and where the object’s inherent meaning could be transferred to the visitor (Smith 1988). Although many new museology perspectives argue for a complete overhaul of the traditional museum, a more useful and moderate stance proposed by Hooper-Greenhill is the post-museum (2000), where some approaches from traditional museums are used and combined with more socially-focused approaches.

The post-museum then “may be imagined as a process or experience … (and take) many architectural forms. It is, however not limited to its own walls, but moves as a set of process into the spaces, the concerns and the ambitions of communities” (Hooper-Greenhill 2000: 152-3). There are several defining features of the post-museum. In contrast to the traditional museum, where the focus was on the collection, display and storage of objects; in the post-museum the focus shifts towards the use of the objects. Significantly, this includes linking the tangible elements of culture with the intangible. Many virtual heritage projects focus only on the tangible aspects, such as buildings, monuments and physical sites, but these cannot be separated from the intangible elements, such as songs, memories and rituals. Similarly, the traditional museum applied a didactic and authorial communication model. As an alternative, the post-museum emphasises establishing a two-way relationship between the museum visitor, and this includes a focus on the experience. The exhibition then becomes part of a “nucleus of events” (2000: 152) of discussions, workshops, concerts and performances.

### 4.3 Digital technologies as cultural forms

The post-museum leads to a broader understanding of museum’s objects and collections. This has implications for digital technologies in museums: they are not merely viewed as tools or mechanisms but as cultural forms in themselves. Flew (2002: 21) summarises this idea in his term cultural technologies, where he states “technologies (are) not simply material forms that impact upon culture, but rather themselves as cultural forms”. Flew’s concept moves discussions beyond technological determinism and rhetoric of innovation, towards more critical and reflective thinking of digital technologies. Further still, Flew identifies three levels towards understanding cultural technologies:

1. Technology as media or physical object, tool or artefact
2. Technology being able to produce and distribute content, and
3. Technology being situated within systems of knowledge and social meaning that accompany their use and development.

Most notably, the second and third characteristics emphasise the experiential and contextual nature of digital technologies. In this way, digital technologies can also be considered integral to museums collections as another medium for representing heritage. The concept of technology as a cultural form extends to all digital technologies in museums: audiovisual guides, interactive screens, networked galleries, 3D environments, PDAs, pod-casting and immersive spaces.

Digital technologies are well positioned to display characteristics of an experience or process in the post-museum. They can potentially provide a better understanding by contextualising objects and places in time and space. As mentioned previously, there already exist many media, such as books, artefacts or photography, which deal with representations of the past and can also be viewed as cultural forms. The defining characteristic of digital technology is then its capacity to enable a high level of interactivity, as supported by many discussions in the interaction field (Rokeby 1998, Bolter and Grusin 1999, Manovich 2001). Digital technologies enable the visitors to have a more hands-on museum experience, encouraging the visitor to interact and look at the collection using a more interactive medium. For example, if visitor interaction cannot take place directly with a historical object due to its nature and fragility, digital technologies can play a significant role in allowing this interaction to take place virtually. It has also been demonstrated through visitor studies that the hands-on
approach can enhance the learning and entertainment experience of visitors, as opposed to merely viewing the object or artefact. Jones-Garmil (1997) recognises the advantages of digital technologies arguing that they provide unique experiences different from books, information labels and photographs. They can be cognitively rich and allow for individually unique pathways, group interaction and are inherently attractive to children. Therefore interactivity is key in sustaining a two-way relationship between the museum exhibit and the visitor. As multimedia practitioner David Rokeby (1999: 1) states “interactivity’s promise is that the experience of culture can be something you do rather than something you are given”.

The question then remains, if there are multiple approaches to representing the past and the aim is to generate interactivity, how do you know if digital technologies are the most appropriate? The answer partly lies in Shedroff’s concept of a continuum of interactivity, which he calls the ‘Experience Cube’. This is useful for a general analysis of interactivity across multiple media. “The only value judgement should be whether the level of interactivity (place on the continuum) is appropriate to the goals or the experience or the messages to be communicated” (Shedroff 2004). Consequently, if virtual heritage exhibits want to support post-museum ideas of establishing a two-way relationship, a high level of interactivity is necessary. The Experience Cube is only a general relationship for visualising interactive experiences because in reality these relationships are not necessarily linear or clear cut.

4.4 Visitor’s experience and contexts

In order to conceptualise how visitors engage with technology as a cultural form in the post-museum approach, it is necessary to understand how visitors can create meaning and knowledge from this experience or process. Falk (1992) and Koester (1993) argue that these experiences are heavily dependent upon the individual’s prior experiences and knowledge, and what people learn in the museum is often directly related to what they knew when they walked in. Thus, the ‘Interactive Experience Model’ proposed by Falk (1992) integrates these varying factors into a conceptual model and highlights the external factors having an impact on the visitor’s experience.

![Interactive Experience Model](image)

In this model, shown in Figure 10, a visitors’ experience is understood as an interaction between three contexts:
Personal context: what the visitor brings to the museum, in terms of visitor’s interests, values, attitudes, knowledge and skills. Hence, the visitors’ familiarity and acceptance of digital technologies will fit under this group. Typically, this is the starting point of a visit to a museum and not a specific subject.

Physical context: what the visitor encounters in the museum, which includes the physical objects, rooms, environment and design. Digital technologies used in the museum also fit under this category.

Social context: these are the interactions between the visitors and other individuals including friends, other visitors as well as museum staff. It includes the social norms in which these interactions take place.

Ultimately, it is this combination of these contexts that make a total experience unique to the individual. Thus it is this interaction that plays a significant role when analysing a visitor experience and its socio-cultural impact; in particular, the use of virtual heritage for establishing a two-way relationship through interactivity.

4.5 Visitor’s multiple interpretations of the content

In order to generate a two-way relationship between the visitor and a museum exhibit as in the post-museum’s view, it is necessary to consider three fundamental characteristics:

- knowledge is considered multivocal and fragmented
- content is dynamic and open-ended, and
- the interpretation process is polysemic.

In this way, visitors interaction with exhibition content can elicit multiple interpretations or as Hooper-Greenhill (2000: 153) explains, “within each local circumstance, specific meanings will be mobilised that have provisional significance within the site concerned. These meanings may change radically as the object is moved from one site of semiosis to another. As the moves take place in time and across space, earlier meanings may be lost or recovered, overlaid by new significations, or reinterpreted by different interpreters”. Based on this premise, virtual heritage has the capacity to involve the visitor in the meaning-making process and further still, generate critical thinking and multiple perspectives.

An example that highlights the complex issues surrounding multiple interpretations of the past in museums is seen at the recently launched Musée de quai Branly in Paris, France. The museum displays a collection of non-western art from Asia, Africa, Australia, the Pacific and the Americas, which was drawn from the Musée d’Homme and the Museum of African and Oceanic Arts. The museum is founded on post-museum perspectives as it seeks to recognise diversity and reconciliation, and acknowledge object’s original associations, as well as being open to multiple interpretations. Thus, it can be seen as a place for visitors to encounter and have dialogue with indigenous cultures throughout the world.

There have been many debates surrounding the launch of the Musée de quai Branly: on one side, ethnographers who were reluctant to witness the separation of collections from the original museums; and on the other side, art lovers, who were against placing the objects in a postcolonial space instead of an art gallery. There have also been calls for the complete repatriation of the collection. These are complex social and political issues, and the Musée de quai Branly uses digital technologies as a strategy towards resolving them. As the visitor moves through the levels and exhibitions, the level of content and interactivity in the digital technologies becomes more complex:

- On level 1 the content and interactivity is designed relatively linear in the digital technologies, with 60 programs exhibited and lasting three minutes.
• On level 2 multiple viewpoints are presented around different themes in about 20 displays, from curatorial perspectives through to local cultures. Content is drawn from reports, oral histories and documentaries.

• Lastly, on level 3, digital technologies involve a high level of interactivity, such as holographic projection, image walls and immersive visualisation. For example, visitors can wear binoculars and interact with a stereoscopic view of Palenque in Mexico and Choque K’Iraw in Peru. In these exhibits, the visitor is central to constructing meaning from the content.

The different arguments over the agenda of the Musée de quai Branly reveal the complexity in dealing with multiple interpretations. The first problem is presenting multiple perspectives of history and can be seen as simply easing away from confronting issues or being politically correct. An issue of Musée de quai Branly presenting multiple viewpoints is that it is attempting to “treat all narratives as equally valuable – denying that one may be ‘better history’ than another – implies that we forgo the possibility that anyone should take responsibility for the past” (Moris-Suzuki 2005: 15). This could inadvertently have the effect of ‘othering’ or exclusion, particularly for those relating to multiple perspectives of the past. Further, “if all narratives are equally true/untrue, it becomes impossible to determine who should redress the legacies of past wrongs, and therefore impossible to act in ways that address that responsibility” (2005: 15). This is a problem not just confined to virtual heritage but within contemporary historical discussions, and so while multiple perspectives are based on equality it can also come at a high cost.

The interpretation of multiple perspectives in open-ended content can also demand a high level of knowledge from the viewer, particularly when dealing with cultural difference and the past. Further still, even if the strategy is to open up dialogue between visitors, the intercultural dialogue is narrowed when not all people able to participate, for example children. This can exclude visitors who only have a general knowledge of the content, and so “while [multiple perspectives] may be an interesting play on the nature of museum knowledge, it leaves those without the necessary knowledge unable to play the game” (Witcomb 2003: 163).

The capacity of digital technologies for allowing multimodality as well as individually unique pathways allows some of these issues to be addressed. Hence, the visitor is placed at a central position in the museum experience, allowing a real dialogue with the content and engages with the multiple interpretations of the past.

4.6 Visitors’ identities and the impact of virtual heritage

It is possible to argue that a museum experience, where the visitor is central to the process, might have an impact on a visitor’s perception of their own or others’ heritages; hence, on their own cultural identity. In addition, if it is considered that digital technologies are integral to museums’ collections as a medium for representing heritage; then it could also be argued that they also play an important role on the meaning making process. In order to prove whether these statements are certain or not, it is necessary to make a more detailed analysis to the visitor and its personal contexts as discussed previously in Falk’s model (1992). This context refers to what the visitor brings to the museum, including their interests, identity, knowledge and skills.

In order to understand how virtual heritage might have an impact on an individual’s perceptions and identity it is necessary to take into account how identity, values and attitudes are shaped and influenced by virtual heritage in a museum or a heritage site. Hence, two core issues should be taken into account:

• Identity as a shaping factor for the usage of virtual heritage in a museum experience, and
• How cultural identity is affected by this experience.
Cultural identity could be conceptualised as not stable or fixed but mobile, multiple, personal and self-reflective which can be subject to change and innovation (Kellner 1995). In this view, identities are constructed as they come from a circumscribed set of dominant values and beliefs in society. Examples of these values and beliefs are class, gender, sexuality, age, ethnicity, nationality, political position (on numerous issues), morality, religion, etc., and each of these discursive positions is itself unstable. In line with this argument, it is possible to take a snapshot of visitors’ identities and analyse their relationships during the visitor’s interaction with the exhibition. For this, Gallivan and Srite (2005) propose a useful conceptual framework, based on social identity theory (SIT), and called the ‘virtual onion’ metaphor. This framework represents culture as a virtual onion suggesting that like layers of an onion, each individual contains layers of cultural identity and experiences. The sequence of these layers can shift depending on the time and circumstances and they also represent how deeply held or superficial certain beliefs may be held in an individual. As such, various identity groups are recognised with which an individual is affiliated: gender, race, generation or age, occupation, location, nationality, religion, political, economic and linguistic. The specific attributes that surround each person interact to form his or her unique cultural identity. This abstract representation of cultural identity operates at the individual level and it reflects the multiple and dynamic nature of identity.

The virtual onion metaphor can help to find new ways of examining the complexity of cultural identities in shaping individual interpretations, beliefs and perceptions before, during and after a visit to a museum. An example of this is when visitors first encounter digital technologies in a museum experience. For this, the most important factors in shaping individuals’ interaction and responses with the digital technology might be their age/generational group, computer literacy or their occupational group. Thus, certain identity layers may matter more in shaping individual’s beliefs and actions during initial exposure to digital technologies, while others’ identity layers can matter at during or after the interaction. Another example is analysing what visitors think about a different culture after gaining new knowledge of their heritage. For discovering these relations, visitors’ studies might be a useful tool as these give information of visitors’ personal context and put the visitor at the heart of the evaluating process of a museum experience (Goetlieb 2005). Understanding such relationships might provide a better understanding of how virtual heritage might help museums to achieve their socio-cultural aims and hence take better advantage of digital technologies in exhibitions.

4.7 Conclusions

This paper has examined the socio-cultural impacts of the use of virtual heritage exhibits in museums and heritage sites. These discussions have been from a post-museum perspective, emphasising the museum visit as an experience or process. The post-museum approach calls for a re-conceptualisation of the museum towards a more socially-focused role. This has implications for digital technologies being considered not as tools but as cultural forms; which provide a high level of interactivity that is integral to virtual heritage exhibitions. Hence, virtual heritage is used as a mechanism for the representation of the heritage of places and cultures allowing a two-way relationship between the museum and visitor.

In order to conceptualise how visitors engage with technologies, a model for Individual Visitor Experiences is discussed to reveal the different contexts that contribute to the unique experience of the visitor. These contexts impact on the interpretation of content that is open-ended and dynamic, and through interaction with virtual heritage the visitor can be involved in the meaning-making process. However, the generation of multiple perspectives has issues: it can be seen as a strategy for easing away from complex issues or trying to be politically correct; or it can demand a high level of knowledge from the visitor. The issues are important in examining impact yet are sympathetic in understanding visitors’ identity as not fixed and stable, but multiple and dynamic. The impact of visitors’ identity is crucial in conceptualising a two-way relationship between the museum and visitor, as well as issues of using pluralistic
content with digital technologies. This interdisciplinary analysis will support museums in the context of continual globalisation and multiculturalism.

References


5 On approaches, gaps and bridges in heritage

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To argue that heritage can function as an instrument for economic and social regeneration of places presupposes the answers to a number of questions. ‘Heritage’ has acquired a multiplicity of meanings, ranging from idea, policy, industry and education. Are discrepancies between these evident? Should such gaps in understanding be bridged, what are the advantages to doing so and how can it be done? This paper will briefly examine the various definitions, outline existing approaches, identify resulting gaps and search for bridges.

5.1 Introduction

Major assumptions are often made about the current role of heritage in society, namely that heritage can be used as an instrument for the economic and social regeneration of places. This in turn assumes that there is a common, universally accepted, definition of what heritage is, a set of common approaches to the topic from which a common understanding can emerge. This overarching paper will rise to the challenge posed by this organising theme by briefly examining various definitions, outlining existing approaches, identifying resulting gaps and searching for bridges. However, an immediate obstacle to proceeding with these arguments is a lack of precision. Heritage has acquired such a multiplicity of meanings and has been laden with such a multiplicity of expectations as to render it too all encompassing to continue. Simple, intelligible answers require some initial equally simple working definitions and self-imposed restrictions.

5.2 Multiplicities

Originally heritage was just the collective generalisation derived from an individual’s inheritance from a past or bequest to a future. This simple word has, however, acquired a myriad of much wider meanings relevant to this argument.

- It is used to describe any relict survival from the human past whether physical artefacts, such as assembled in museum collections, designated buildings, structures and ensembles, as well as ‘intangible’ survivals of customs, crafts, skills and languages and even points on the earth’s surface which although having no surviving physical structures may become heritage through their ascribed associations with events or personalities from the past.
- It is used to refer to all accumulated cultural and artistic productivity, whether produced now or previously. This can be extended to include almost any aspect of community life whose effective functioning, or contribution to the favoured image of the collective character or identity, renders it worthy of note, preservation and transmission to future generations.
- It is used not only for the artefacts and ‘mentefacts’ of human productivity but also for aspects of the natural environment such as heritage landscapes, parks and even specific flora and fauna in which the species is seen as more indigenous, typical or characteristic and thus more appropriate for passing on as heritage to future generations than other species. Indeed people could be added to the list through the notion of recognising, preserving and passing on communities as species rather than individuals, because they are seen as a characteristic living heritage.
• It is used for any aspect of the past when viewed from the present. For the individual, ‘I remember therefore I was and therefore I am’; and for the community ‘we remember, or have been told we should remember, and therefore we were, we are and we will be’.

• Finally, it is used to describe a wide range of cultural, social, political and economic activities, whether of governments or of commercial enterprises. These include the commodification of the past for sale upon diverse markets, the creation and promotion of cultural and spatial identities in pursuit of social objectives, the socialisation of individuals within society and the legitimation of ideologies, spatial jurisdictions and more generally the exercise of government and power.

As a consequence of the multiplicity of meanings, heritage is now burdened with a parallel multiplicity of expectations. Heritage is expected to:

• be both an expression of a unique individuality and an instrument of official policies for collective goals.

• express both universal cultural values and to differentiate between localities and groups through enhancing the distinctiveness of places and peoples.

• both reflect and celebrate social and cultural heterogeneity while enhancing social cohesion and inclusion.

• both promote distinctive places within global markets and to reinforce a countervailing localism.

• both brand economic place products for export, especially but not exclusively through tourism and to further local social and cultural objectives.

With such a multiplicity of quite different meanings and expectations that are frequently contradictory, it would be surprising if gaps could not be detected. At the risk of oversimplification all of this could be reduced to three main portmanteau categories: heritage can be considered as an idea, a policy, an activity, here rendered as an industry, and an educational process (see Figure 11).

Figure 11: the multiplicity of heritage meanings
5.2.1 Heritage as idea

At its most fundamental heritage can be viewed as an intellectual paradigm, a way of approaching and attempting to order and understand an aspect of human life and experience. This paradigm can be simply, clearly and unambiguously stated. Heritage is the contemporary uses of pasts. This is not only different from any paradigm in history, archaeological or antiquarianism, it is also quite different from those of preservation or even conservation. The past is what has happened, history is the attempt to describe or re-create that on the basis of selected available records but heritage is a product of the present, purposefully developed in response to current needs or demands for it, and shaped by those requirements. It makes two sorts of intergenerational links both of which are determined by the present. The present selects an inheritance from an imagined past for current use and decides what should be passed on as useful to an imagined future. It is thus a product of the creative imagination in response to some need felt by the creator.

The logical implications of the heritage paradigm can be simply stated as the refutation of a series of deluded assumptions or assumed delusions.

- **Heritage is about preserving or recreating pasts**: Pasts, if they ever existed as previous presents, by definition do not exist now and we cannot operate other than in the present. You cannot preserve what does not exist.

- **Heritage is a bridge between pasts and futures**: The past and the future are imagined entities – only the present is real. Attempts to colonise an imagined future with the values of an imagined past are absurd and doomed to failure.

- **Heritage is the recognition, preservation and transmission of intrinsic universal values**: Heritage has no intrinsic values. All heritage values are extrinsic, ascribed and therefore mutable.

- **Heritage is a fortuitous endowment, richly or parsimoniously bestowed on us as beneficiaries, whether we wish it or not**: Heritage is a contemporary product created for the satisfaction of contemporary needs. It does not exist in any fixed quantity nor can one place or people inevitably possess more than another. It is equally not compulsory: no place or person is locked into any specific endowment.

- **Heritage is a collective phenomenon in which collective pasts contribute through a collective endowment and collective memory to a collective future**: Individuals create their own heritage from their own selective endowments and memories. Collective memory, like common heritage, is not an aggregate of the individual but a metaphor used by those who for various reasons wish to shape collectivities.

- **Heritage unites people through a process of common inheritance from a common past and to a common future**: If all heritage is someone’s heritage then it cannot be someone else’s: Your claim upon the past disinherit mine. All heritage disinherit, divides and separates some people to some degree at some time. Mostly this does not matter: sometimes it does with serious consequences.

As an idea, therefore, heritage contributes a distinctive view of time and an equally distinctive approach to contemporary society. None of this implies any inevitable or particular application or activity but equally offers many flexible and abundant possibilities.

5.2.2 Heritage as policy

Heritage as official policy can be summarized in two words, legitimation and socialisation.

**Legitimation**

Legitimation, validating the right to exercise power, has in turn three components, namely the legitimation of the group as forming an entity; the legitimation of the values, norms and
ideology regarded as being held in common by the group and thus forming its binding
medium; and, finally, the legitimation of the rulers, the brokers and the policy makers who
exercise power within the group. There is nothing new in the deliberate use of heritage as an
instrument for the establishment of the right to rule: an appeal to the past provides a continuity
and a permanence, simply, if it has always been so, then it should not now be challenged.
Although this notion has been strongly related to the exercise of power in the political arena,
most especially in the nation state it is by no means confined to this arena or this state form.
This does not inevitably imply a simplistic ‘Habermasian’ national hegemony or
‘Bourdieuian’ dichotomy of dominant and subordinate classes. Heritage is a medium of
representation, which can be and in practice is, used to communicate collective cultural values.
It is thus influential in the reproduction and contestation of cultures. Who controls heritage
may change the trajectory of the contestation for the ownership of the past in which cultural
hegemony is the goal. However, it is equally often far simpler and more prosaic with the
political consequences stemming from, rather than motivating, decisions.

Socialisation

Socialisation is the transmission of the legitimacy of groups, ideas and rulers to society and
particularly to its new affiliates, as the membership of groups is never static for demographic
reasons alone. These candidate-members may be children, members of the subordinate group
desirous of incorporation in the dominant or, immigrants. The new generation or new citizens
are socialised most usually as part of education, whether formal or not, and, as any visitor to a
museum or heritage site will readily experience, through the more or less compulsory
educational visits to sites and museums regarded as of central symbolic importance to the
group. However, this is too constrained a perspective for a number of reasons. First, heritage
is capable of being interpreted differently within any one society at any one time, as well as
between societies and through time. There is likely at any moment to be a cacophony of
coexisting or conflicting legitimacies, with the obsolete and the nascent as well as various
forms and expressions of the dominant. Further, while evocations of official collective
memory underpin the quintessential modernist constructs of nationalism and legitimation, it is
also apparent that heritage takes a variety of unofficial guises as well as official state
sponsored ones, and the former may well be, at best ‘off-message’ and at worst subversive of
the latter. In reality much official heritage is actually created and managed by and for the
dominant social elite, they both produce and consume and are therefore effectively conversing
with themselves, which serves a function of reminder and self-reinforcement within the
dominant group. The ‘subordinate class’ is either just not present in the museums and
galleries or if present cannot or does not receive, comprehend and incorporate the messages as
intended.

Simply, heritage is used as an instrument of policy but can be forged into many different
instruments used in the pursuit of many different policies. Currently in many countries
heritage is seen as exercising a decisive role in cultural ‘inclusion’, or at least the mitigation of
its converse, cultural ‘exclusion’ in pursuit of social and cultural ‘cohesion’. However, there
is an enormous diversity of practice, the results of which are therefore not as predictable or as
homogeneous as many expect.

5.2.3 Heritage as industry

From an economic perspective heritage is a resource, capable of being turned into marketable
products through a process of commodification and generating economic returns. Heritage
simply is exploited worldwide in the production of heritage goods and services and as a
primary component of strategies to promote tourism, economic development and rural and
urban regeneration as this symposium amply demonstrates.

Amongst the many economic roles performed by heritage, it may be helpful to distinguish
between direct and indirect uses. In the former heritage is used directly as a raw material in a
process analogous to industrial assembly, which raises all the related issues of resource
depletion and sustainable development. In one sense, all heritage resources are renewable because the past can be continuously reinterpreted. Indeed if every generation re-writes its history, so do they also re-create their heritage? Increases in demand can in theory be met by increasing the supply of products from the same inexhaustible resource. There is comfort in the thought that unlike most resources, the stock of heritage is not only not depleted by its use, it is capable of almost infinite reproduction as the only limits are those of the human imagination that created it.

However there are at least three qualifications to this argument, which in turn create the issues that dominate any discussion of heritage as industry.

- First, the physical manifestations of heritage, locations, sites, structures and objects are, at least in the short term, finite and capable of being damaged or depleted, which is, of course, one factor promoting the widening of what might be called the heritage product portfolio. The supply of heritage resources in general may be infinite but the supply of a specific building or site at a moment in time is not. This raises all the familiar management issues and solutions such as rationing, prioritisation and even the virtual consumption of place-centred heritage.

- Secondly, in heritage the resource and the product have a more complex and often asymmetrical relationship than the industrial analogy suggests. In purely economic terms it can be argued that the capital generated from heritage production flows back to heritage resources only indirectly, if at all. The relationship has been described as parasitical in two senses. The resources were not created for their current economic uses, nor frequently are they protected and managed in the first instance for these uses. The economic returns generated by heritage resources are not reinvested in the replenishment of the resource. Certainly, the link between costs and benefits is, from the viewpoint of the resource itself, very indirect.

- Thirdly, it can be argued that the consumption of heritage changes the nature of the resource. Heritage places in particular are altered by their very consumption. They tend to consume their own contexts. Even setting the local/global, heterogeneous/homogeneous arguments aside, heritage use is heritage resource altering. This returns to the inherent paradox in heritage that trying to prevent change by conferring monumental status, is itself a quite fundamental change which freezes the artefact or place in time, removes its central characteristic, the capacity to change, and most essentially alters the way it is perceived and valued. To preserve is thus inevitably to destroy.

The indirect economic functions of heritage are more varied, frequently less obtrusive and thus more difficult to isolate and describe. The changes in economic production and in society have both resulted in the rise in relative importance of amenity, however defined, and specifically relevant to heritage. To the individual, quality environments, whether natural or man-made become important consumables and components of the life-style package; to the producer such environments become a significant location factor; to place managers amenity can be used instrumentally to attract or retain investment, residents or recreationists. Heritage is an important component in shaping such quality environments, with its perceived significance as an attractive constituent of place images deliberately projected to attract inward commercial investment.

5.2.4 Heritage as and in education

A consideration of heritage as education needs to distinguish between what could be termed its formal and its informal roles. The latter is close to being a truism because if all heritage is communication, and if it is not then its function must be questioned, it is endeavouring to transmit some message from someone to some else. Official heritage is thus self-evidently educational, not least in its socialisation and legitimisation roles argued above, whether these are explicit or not. Heritage is also a component within education seen as a formal activity in which skills, concepts and values are deliberately and self-consciously transmitted.
In terms of the numbers of courses, qualifications, students and teachers it is easy to
demonstrate that in many western countries heritage education is a growing activity. A
difficulty here is the diversity of quite different educational activities that could be included
within this overarching term, heritage education. These could include among others:

- Heritage transmitting activities in which heritage forms the content. Vaterlandsgeschichte
  (The history of the Fatherland) and Heimatkunde (The study of the Homeland) are alive
  and well in educational institutions in various forms in many parts of the world and
  ultimately dominate the interpretive work of many government ministries and agencies.

- Heritage resource identification, selection and maintenance in which the focus is upon the
  creation of inventories, the conferring of legal designations and the care of potential
  resources. This may involve both bureaucratic involvement and many highly specialised
  technical activities concerned with material preservation.

- Heritage delivery activities where the logistic techniques of supplying heritage products
  and experiences are taught. The presentation and management of heritage consumption is
  central to museums and other components of cultural industries and more widely in
  tourism management.

- Heritage as intellectual paradigm, pervading a range of academic disciplines concerned
  with the relationships of pasts, presents and futures.

### 5.3 Bridges?

To argue that heritage can function as an instrument for economic and social regeneration of
places presupposes the answers to a number of questions. Which approaches outlined above
are being used and are gaps and discrepancies between these evident? Should such gaps in
understanding be bridged, what are the advantages doing so and how can it be done?
Differences do not necessarily make conflict inevitable or even likely. Heritage can serve
different goals with different perspectives, using different working methods and instruments.
In marketing terms it is inevitably multi-sold successfully through market separation,
segmentation and targeting. The issues that arise in practice frequently stem from the
condition that although the products are different, the resources from which they are
constructed, not least physical space, may well be the same. In the heritage process the
resource managers are usually different from the product assemblers and promoters, having
different motivations, objectives and working methods. This is as true for heritage as policy
as it is for heritage as industry or as education. Thus the modest ambition of the avoidance of
conflict as a goal of management is probably more significant than more grandiose attempts at
bridging.

Those working in heritage education, however defined, need necessarily to live with
irresolvable paradox. Heritage is essentially individual. Your heritage is unique and cannot
be sold to anyone else; it is just irrelevant to them, but heritage is also a major collective
consumption. Heritage appeals to universal intrinsic and incalculable values yet trades in
extrinsically priced commodities. Heritage is serious, indeed often deadly, but equally
heritage is trivial and fun. Such paradoxes are the source of problems and conflicts but also
the font of possibilities and opportunities.

### Further reading

Ashworth, G. J. (1997) Conservation as preservation or as heritage: two paradigms and two
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Part 2

Case studies
6 Heritage – a burden or an opportunity? Current dilemmas of Krakow’s growth

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This paper considers the experience of Polish transformation, with special emphasis on the issue of heritage and its protection in Krakow. Since the fall of Communism, not only the historic city has undergone a transformation, but also the very notion of heritage. Also while a historic site is part of the past, heritage serves contemporary goals. It is proposed that the key to achieving a balance between heritage and culture on the one hand and economic growth on the other is through politics and policymaking.

6.1 Introduction

The functional model of Krakow was, and still is, characterised by heterogeneity. This is a positive phenomenon. Despite the occurrence of numerous negative events and trends in the last half of a century, Krakow has retained its potential for exerting impact on a supra-regional scale. This potential, still latent to a high degree, is part of the natural capital that the city is entering the 21\textsuperscript{st} century with. This capital is formed by the metropolitan functions of Krakow, based on the exceptional significance of its cultural heritage, and also the intellectual and artistic potential of the city. In Poland as a whole, the experience of Krakow in this respect is unique.

6.2 Metropolitan functions of Krakow

The first metropolitan function of Krakow is its heritage. In this context heritage has two meanings. They are:

- The tradition of a community, and its duration, on the one hand, which encompasses both Krakow’s role in integrating Polish people and the city’s very high recognition in Europe and worldwide.

- And then, on the other hand, it is this cultural heritage in the material sense of the word, i.e. the perfectly-preserved historical urban fabric and its supra-local dimension, confirmed \textit{inter alia} by the entry of Krakow, in 1978, onto the UNESCO World Heritage List; as characterised by top-class historic sites; museum collections; and within this, the societal aspect of heritage. Krakow is the only big historical city within the current borders of Poland to have survived the tragedy of the Second World War without being destroyed in either the physical and societal sense.

Another metropolitan function of Krakow, one that is closely linked with the previous one, is the potential of its cultural circles and institutions. Krakow’s culture-generating force inclines us to call it “the cultural capital of Poland”. There is no doubt that, despite the underdevelopment of Krakow’s cultural infrastructure, this sector provides a broad employment market and provides a basis (for example in economic terms) for its exogenic functions of generating the urban character of the environment.

A significant function of Krakow is as a centre of international tourism. Krakow as a product in the tourist industry, the city’s ties with its regions, various forms of tourism, including the growing role of Krakow as a pilgrimage destination (Divine Mercy Shrine in Lagiewniki, ‘papal tourism’), are issues of primary importance to economic growth throughout the Malopolska region. Cultural tourism has recently become the main driver of the economic
development of Krakow and Malopolska, especially since Poland’s accession to the European Union.

The number of visitors to Malopolska has been growing year on year. In 2005, it reached 9.3 million, up from an estimated 9.1 million in 2004, and 8 million in 2003 (see Table 1).

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<tr>
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<th>2005</th>
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<th>2003</th>
</tr>
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<tr>
<td>Visitors to Malopolska (total)</td>
<td>9.30 million</td>
<td>9.10 million</td>
<td>7.95 million</td>
</tr>
<tr>
<td>Tourists visiting Malopolska (total)</td>
<td>7.35 million</td>
<td>8.20 million</td>
<td>6.20 million</td>
</tr>
<tr>
<td>Foreign tourists</td>
<td>2.25 million</td>
<td>1.90 million</td>
<td>0.964 million</td>
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Table 1: Estimated number of visitors to Malopolska in the years 2003–2005, according to the Malopolska Tourist Organisation (MOT)

The number of foreign tourists has been growing at a particularly high rate. In 2005, the top five groups of visitors to Malopolska included tourists from:

- Germany (15.73%)
- United Kingdom (11.76%)
- Italy (10.20%)
- France (9.66%)
- United States (7.95 %)

According to recent estimates, in 2006 Krakow alone will be visited by some 7 million tourists, who are expected to contribute around 2.5 billion zlotys to the city (which is more than the borough’s annual budget). After 2004, Krakow became one of the fastest-growing centres of tourism in Europe. This has been corroborated by the recent ranking of Travel & Leisure monthly (July 2006), where Krakow ranked fifth among the ten most attractive cities of Europe. It was superseded only by Florence, Rome, Venice and Istanbul. The spontaneous growth of international tourism in Krakow is manifested in the extremely dynamic development of the Balice Airport. In 2004, the Krakow Balice Airport was used by approximately 841,000 people; by 2005 there were 1,586,000 users. In 2005, low-cost airlines covered 48.5% of the passenger traffic, while traditional carriers served 43.3%. It is estimated that, in 2006, the airport in Krakow, which has direct connections to 50 airports, will receive 2 million passengers. Planes from Western Europe bring in hosts of tourists. Some are attracted by the historic sites while others are drawn to the character of the city, with its clubs, pubs and restaurants. Special interest is inspired by its museums of international renown. The sites entered in the UNESCO List are often visited, such as the salt mine in Wieliczka or the Auschwitz-Birkenau Museum. The last few years have seen substantial growth of interest in Malopolska’s wooden churches, which have attracted considerable numbers of visitors from Japan and China.

The other important factor in generating increased tourist traffic, apart from Poland’s EU accession and development of air links, is the fact that Malopolska was the native land of Pope John Paul II. John Paul II’s home in Wadowice near Krakow attracted 431,411 visitors in 2005, which included 53,851 foreign visitors. Research completed by the Department of Geography of Religion at the Jagiellonian University indicates that the Divine Mercy Shrine in Lagiewniki has been visited by pilgrims from 85 countries. In terms of reach, Lagiewniki exceeds even the most renowned places of religious worship in Europe. Research indicates that 25% of all Lagiewniki pilgrims are foreigners, mostly from Europe (except for Albania, Macedonia, Malta and Serbia), and also from the Philippines, Costa Rica, Cuba, Japan, South Korea, the United States, the Ukraine and Russia.

Tourism has thus become one of the primary factors in the development of both Krakow and the whole region. The 2005 revenue from tourism in Malopolskie Voivodeship is estimated at
3.8 billion zlotys, which is a 10% increase on 2004. This is accompanied by the rapid growth of the tourist services market, with major investments in hotels and restaurants. This contributes significantly to both the employment market and to the region’s tax base. Because of this the importance of culture and heritage are increasing as the exogenic functions of the economic development of Malopolska’s main city.

6.3 The Communist legacy

Krakow’s success in attracting tourism provides an indication that Krakow has overcome the legacy of the Communist era. During this period, Krakow was symbolised by Nowa Huta, a Stalinist era city district that was built from scratch around the Lenin Metallurgical Complex not far from the historic centre of Krakow. The pollution from this industrial facility became a threat to both the local population and the fabric of the historic buildings. The situation became so bad that during the seventies and eighties the Western media labelled the city as “polluted and depressing”.

Today, Krakow is trendy. The change of the city’s image has been brought about by the decline in the steel industry at Nowa Huta after the fall of Communism and the extensive efforts that were directed towards the preservation of historic buildings which has helped to mitigate the effects of the pollution. This was made possible because of the State subsidy from the National Fund for the Renovation of the Historic Sites of Krakow, incorporated by the Polish Parliament. For over a decade, the State budget has funded costly preservation works in several hundred historic buildings, which has dramatically changed the image of Krakow’s city centre. This is also the case with Kazimierz, the former Jewish district, which, ten years ago, was still a symbol of the sordid fate of the heritage of the disinherited in Central Europe. Today Kazimierz is also perceived as a success story. This is because Krakow has recently become not only a Mecca for international tourism, but also a developer’s paradise. Since Poland’s EU accession in 2004, Krakow has recorded the highest price growth on the property development market in Poland. The Historical centre of Krakow, and in particular the luxury apartments and guesthouses in the heart of the historic metropolis, have recently become a lucrative form of investment of capital for investors from the rich EU countries. According to the Rednet Property Group research, in the first half of 2006 alone, the average price of a square metre of residential floorspace in Krakow increased by nearly 40% from 4,332 Polish zlotys (approximately £764 or €1135) to 5,990 Polish zlotys (approximately £1060 or €1570).

This “defrosting of the fridge” and the breakthrough ending the stagnation that Krakow had been stuck in through the Communist decades changed the rules of the game in the city. The abrupt return to the land-rent mechanism and re-economisation has brought about, in recent years, an acute conflict between heritage and development. The upward trend in the economy translates not only into an overall improvement of the technical condition of the city’s historic infrastructure, but, paradoxically, also into an abrupt degradation of the cultural landscape of Krakow. The Polish State, so generous in launching costly large-scale preservation (or even reconstruction) schemes, has proved helpless when confronted with the sheer scale of the pressure exerted by capital on the built infrastructure. The powerful processes of privatisation, commercialisation, and commodification of the heritage has also led to a violation of the code of the city that had until recently been considered an outstanding example of authenticity of historic urban fabric. It is true that changes in the urban landscape are inevitable, but they do not necessarily have to be a function of urban planning transformations. They are, however, always a reflection and an indicator of social changes, and also of the condition of the State where they occur.

Krakow has thus become a special case of success in overcoming the burden of Communism, and at the same time a symbol of the acute crisis of spatial planning, which is a threat to the city’s cultural landscape.
6.4 A city in crisis?

Despite the lesson of consistent and rigorous control of public space in the twentieth century, today Krakow is a city without a plan. This is not because there are no outstanding planners and architects in Krakow, or a whole army of historic preservation specialists. The so called Second Ziobrowski Plan from 1994 was the last comprehensive and relatively effective instrument for protection of Krakow’s cityscape. Its preparation was preceded by in-depth studies. Although it had been known much earlier, in 2003 it was plainly evident that the instrument ceased to be in effect and the city found itself in a sort of planning vacuum. This is a major setback, which is taking place at a time when Poland and Krakow are hastily and successfully making up for the backwardness occasioned by the lesson of communism. Are the heritage and cultural landscape of our city in mortal danger then?

The diagnosis of this ‘new’ situation, surprising to many, is not much of a discovery. Today the heritage of Krakow is endangered by:

- A lack of vision for the city, based on values.
- A lack of a plan and sufficient planning tools.
- A lack of effective construction supervision and effective enforcement of law.
- Corruption, which is almost endemic.
- Helplessness, and sometimes even permissiveness on the part of central and local government agencies, towards the privatisation and aggressive commercialisation of public space.
- Decline of professional ethics among circles that shape the urban space. It is not good when profit is the paramount goal in architects’ activity. What follows is the compromise of both civil-society objectives and aesthetic qualities.
- Degradation of historic preservation services.

The list can go on and on. Moreover, these problems are not just the problems of Krakow or of our time. In his notable book Das Steinerne Berlin (the Stone Berlin) published in 1930, Werner Hegemann (1881-1936) portrays Berlin at the end of the nineteenth century as a city of wild land speculation and incompetent local government. Is this an analogy or a paradox? After all, in Krakow today, pressure on the urban fabric and space is not caused by demographic growth. After 1989, Krakow did not succumb to the demographic processes that many metropolitan areas have undergone and continue to undergo today. Moreover, Krakow has attained demographic stability and today we are far from the problems of migration and immigration which is becoming an issue for cities in Western Europe. At the same time, because of the drastic change in the economic situation in Poland, and through the pressure of capital which is not counterbalanced by a systemic model that would be adequate for the new challenges, what we have today is a ‘soft’ and centralised State administration, and a local government that is weak in terms of its prerogatives. In particular, after 1990, local government in the big Polish cities was conferred commensurately weak powers when compared to the tasks set for it. It is not enough to just administer urban development. It has to be managed wisely, and its growth needs to be stimulated.

Can one therefore talk about a crisis of the city in Krakow today? To understand this we need to consider a bitter paradox. When we look at Krakow, as a process, as a resource, as potential, as function, we have to understand that there has been a rapid change in the model and mechanisms of growth, and that Krakow has used the historical moment after 1989 as an opportunity for a significant pro-development change. This change cannot be denied certain qualities of success. This success is a combination and outcome of a vast range of phenomena that extend far beyond the boundaries of Krakow and, since 1989, have formed an entirely new reality across all of Central Europe. But a city is not an accident; it is a concept of higher rank.
Since 1989, Krakow has simultaneously experienced changes to the idea of the city and changes to the city-game rules. Over a short period of time, it ceased to be a totalitarian city and became a liberal one. A liberal city does not necessarily have to result in spatial chaos. Vienna at the end of the nineteenth century, and in particular the Viennese Ringstrasse, is a monument to the great art of urban design in the era of liberalism. But in our reality, a liberal city is primarily the effect of the clash between the upsurge of development and the State being unprepared to capitalise on it. Of course, this dramatic change in the rules of the game after 1989 was a source of confusion to ordinary people, who, during the period of transition, often were and still are unable to identify their own group interests. Moreover, being tired of the prolonged crisis of the communist era, people had relatively low expectations.

So what is the diagnosis today? What is the combination of phenomena that actually determines the condition of our cultural landscape? I have already ranked the crisis of spatial planning above all other factors. It is connected with the fact that, in Poland today, the local government is a weak player in the game against appropriation of public space through biased interpretation of law, and sometimes actually plays a decisive part in such perpetrations. I have also mentioned the lack of an urban-planning vision. It is a consequence of the lack of synchronisation between the various policies followed simultaneously within the city by our country’s central government and its agencies, by the regional government and by the borough authorities (i.e. all the principal players that determine the shape of the Krakow metropolitan area). Furthermore, we are facing a very rapid commercialisation of space, something that is inevitable and unavoidable. A question arises, however, about the scale and boundaries of this commercialisation, and in particular the general permissiveness allowing for the privatisation of the most valuable pieces of land, which should form a public reserve in any self-respecting city.

Nowadays, thoughtlessly, and often under anything but transparent circumstances, the city is divesting itself, contrary to its strategic interest, of its last reserves of public space, which not long ago were still in the hands of the State Treasury. We have many precedents in this matter and this is the problem of the ‘soft state’ and ‘soft liberalism’, and this is what my questions are based on: questions about the local government, about its place and function as the main player calling the shots in this battle for the shape of our public space, the shape of our landscape. Should the local government be merely the administrator or also the stimulator of urban development? What tools does it have for such stimulation effort today, and what tools should it have? Consequently, does the local government feel responsible for the vision of the city? Does it feel that it serves as the guard of the public interest and the mainstay of the rule of law?

The city’s local government should not and cannot control the growth processes, but it should steer them, and it certainly must not waive its duty to control the space. It is the primary duty of the local government, as a societal achievement of Europe: the local self-government that was born in the Middle Ages, and then reborn in the Habsburg monarchy in the second half of the nineteenth century. The fruit of the operation of both these models of self-government is today the unique shape and identity of Krakow.

The history of Krakow has accustomed us to believe that the local government is the vanguard of planning order within the borough. After 1990, however, this tradition was not continued. This is why the local government today is not an embodiment of the civic model that is symbolised in Krakow by such figures as Józef Dietl, Mikołaj Zyblikiewicz and Juliusz Leo. This may be why the civic Krakow is moving outside the local government today, while the interests of the borough office are less closely identified with the vital goals of our city’s long-term presence in Europe. The clash of the intelligentsia with the privatisation of public space and the growing conflict between the interest of the community and that of the individual are the essence of the crisis we are talking about today.

Therefore, today we need to highlight the causes of the conflicts we are now forced to witness and participate in. Conflicts which we often try to oppose awkwardly and unskilfully. At the
same time, what we are dealing with is the growing spontaneity of urbanisation processes. It is also clear that the protection tools we have, were designed for a static and centrally-steered system, and are no longer adequate anymore. Their inefficiency is augmented not only by the systemic weakness of the local government, but also by the crisis in the sphere of values, the ‘soft state’ and the primacy of private and group interests over the public interest. It is also necessary to point out the intensification of provincialization processes. These greatly affected cities such as Krakow after 1998, because of the implementation of the ‘centralist’ rather than the ‘polycentric’ option of the regional reform introduced by Jerzy Buzek’s cabinet. That brought about a reduction of Krakow’s metropolitan functions and strengthened the process of transforming Poland’s former capital into a “party-goer’s city”, which has accelerated the heritage commodification process.

This new situation calls for a prompt redefinition of what the public interest is in Krakow and an attempt to create an alternative vision for the development of the city, based on values. We should not allow the appropriation of public space to the degree it is happening and on the terms it is done these days. The short-term approach used as a tool for implementing the objectives of various lobbies should not be the main instrument in the planning of Krakow’s future.

The inevitable change that we are experiencing today also entails a change to the collective memory, a change to our awareness, self-awareness and identity. What then is the dilemma of Krakow after 1989? Is it one between the permissiveness allowing for listless colonisation and an ability to be creative in reliance on a preserved canon of values? Has this dilemma been decided already? The McDonaldisation, Disneylandisation and uniformisation of the space of our cities is a fact, but perhaps not entirely an adverse one. The clash between the relentless historicist attitude, going back all the way to the traditions of Matejko and Wyspiański, and the modernisation and globalisation processes may be a creative one. What is needed for, however, is general reflection upon the following questions:

- Where are we today?
- What is our model of thinking – including about ourselves?
- To what extent does the crisis of historical culture in Poland – affect our attitudes and intentions toward the landscape of our cities?
- And finally, what is our vision for our development and the nature of growth. Should land speculation be the foundation for building up the durability of Krakow as a European ‘pensionopolis’?

Now that Krakow thrives in the European market of cultural tourism and in the international property market, the city is beginning to suffer from a spectacular crisis of the management of its historical space. The crisis of vision, the crisis of values, the crisis of leadership, and the crisis of the State are causing the degeneration of our cityscapes. In this respect, the planning crisis in Krakow is undoubtedly a derivative of the crisis of the city defined as a civitas. Notice the characteristic coincidence. The Latin civitas evokes two highly symbolic English words which form the axis of our debate: ‘city’ and ‘civilization’. Peter Hall (1998), the author of Cities in civilization, when looking for characteristic fields for an analysis of the relations between the phenomenon of the city and the phenomenon of civilisation, points out that the contemporary ideal of the city is harmony: a harmony of art, technology and organisation.

Perhaps, in defence of values and in our strive for harmony, we need to organise Krakow anew today? There is no doubt, after all, that the disease spreading throughout the civitas of Krakow is also placing a stigma on Krakow’s suburbs.

So, the transformation is making us redefine our approach to heritage. The recent years have brought about an evident clash between two opposing trends. On the one hand, the ‘sphere’ of heritage has grown visibly, as have the capabilities for its protection. Suffice it to say that the
nineties saw, \textit{inter alia}: the transition to protection on the cultural landscape scale; the extension of the chronological framework of protection to include the heritage of modernism; growing interest in the heritage of totalitarianism and the heritage of hatred (Holocaust), or the rediscovery of the heritage of the disinherited (e.g. the Jewish cultural heritage). On the other hand, it is difficult to miss its marginalisation and instrumentalisation, in particular the crisis of the national heritage protection system. The transformation has positioned heritage in Central European countries up against new challenges and new hazards. The latter are particularly conspicuous in the centres of large cities. The hasty reshaping of their cultural landscapes, often boiling down to their degradation, is a result of the systemic transformation, the triumph of the spontaneous elements of the market coupled with the weakness of the existing instruments of protection. Today, the transition from the passive and static thinking about heritage, conceived of in terms of its sacred dimension, to its protection in the reality of spontaneous processes of privatisation and commercialisation of public space, requires major changes in the system of management of the heritage potential. The greater the success of the economic transformation, the greater the conflict between capital and heritage. This leads to inevitable conflicts, particularly in the centres of large historical cities like Prague and Krakow.

6.5 Conclusions

The experience of Poland and Krakow in the spheres of heritage and transformation provokes the following conclusions:

- In order to reach a balance between culture and heritage on the one hand and economic growth on the other, politics and policymaking are of paramount importance.
- The passivity of the State can lead not only to failure to exploit the potential of the heritage, but also to its degradation.
- Heritage is a common good, which today is falling victim to private interests. The State, in its capacity of the guardian of the common good, often remains helpless in the face of the uncontrolled commercialisation of public space.
- The inevitable processes of marketization and commodification of heritage are a new challenge for the State, and a crucial one at that. Today, the key to achieving a balance between heritage and culture on the one hand and economic growth on the other is in politics and policymaking. This applies to local government as well. The need for an integrated national and regional heritage strategy also requires breaking through the syndrome of fragmentation of Polish reality into divisions headed by separate cabinet ministries. Heritage is not only about culture and education, but also about spatial planning, regional development, and tourism.

The hitherto experience of Polish transformation, as regards the issue of heritage and its protection, reveals an urgent need for a new opening. The example of Krakow is particularly stirring. It goes to show that, since the fall of communism, it is not only the historic city that has been undergoing transformation, but also the very notion of heritage. And while a historic site is part of the past, heritage serves contemporary goals. There is then no doubt that it is easier to talk about a system for the protection of historic sites than to create an effective system for the protection of heritage.

References


7 The creation and sustainability of the Brighton Fishing Museum

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Brighton Fishing Museum is a voluntary museum housed on the seafront at Brighton. The Museum is an example of community involvement in heritage and the preservation of fast vanishing identities. The museum is also an exemplar of how a community heritage project can act as an instrument for economic and social regeneration of places. In this paper the history of the Brighton Fishery, the community identity of Brighton’s fishing community and the origin of the museum is considered. The model for the museum’s sustainability is based on the generation of traditional commercial buildings on the seafront and regeneration of Victorian Arches to create a rental potential from parts of the fishing quarter which is used to sustain both the fishing quarter and museum.

7.1 The history of Brighton’s fishing industry

Brighton is a town born of the sea. Whether through fishing or tourism the sea has underpinned the economy of the town. Brighton first enters the historical record in 1086 with the publication of the Domesday Book. King William’s surveyors recorded that Brighton (or Bristelmestune as it was then called) comprised three manors all belonging to Earl Godwin before the Norman conquest. After the conquest one of the manors was held by a knight called Radulf. It supported 18 villagers, 9 smallholders, and one slave. But, even at this early date, it is clear that Brighton was a fishing village, because it also provided a rent of 4,000 herrings to the king7.

Brighton’s origins as a fishing village stem from its geography. It does not have a river or natural harbour but in the medieval period and up to the seventeenth century its beach was much wider – wide enough to beach the boats of Brighton’s fishing fleet and hold the many buildings and infrastructure associated with the fishing industry (so many buildings that it has often been thought that medieval Brighton contained a Lower town on the beach). This beach played a crucial part in determining the importance of Brighton. No other similar beach existed on the western channel coast, and this made up for the absence of a harbour.

The fishing industry operated according to a long-established calendar. Oysters were dredged during spring. Mackerel were caught in the summer months between May and July, complimented by red mullet in May, and prawns and lobsters in July. Flat fish were trawled in August, whiting followed in September and October, and finally herring were caught in November.

Fishing was a labour-intensive industry and when times were good such as during the Elizabethan, Tudor and Stuart periods, the town’s economy boomed. Daniel Defoe noted that:

“About Michaelmas these Folkstone barks, among others from Shoreham, Brichthelmston [Brighton] and Rye, go away to Yarmouth, and Leostoff, on the coast of Suffolk and Norforl, to the fishing-fair, and catch herrings for the merchants there.”

7 The full reference for Brighton reads: “Radulf holds Brighton of William. Beorhtric held it by grant of Earl Godwine. TRE (in the time of Edward), as now, it was assessed at 5.5 hides. There is land for 3 ploughs. In demesne is half a plough; and 18 villans and 9 bordars with 3 ploughs, and 1 slave. From rents, 4000 herrings. TRE it was worth £8.12s; and afterwards 100s, now £12.”
Between 1550 and 1650 the population expanded from 1,000 to 4,000 primarily because of the fishing industry. In the late 1500s the town could boast 80 fishing boats, 400 able seamen and 10,000 fishing nets (Underwood 1978: 51). In 1601 the Brighton fishery sent its biggest contingent of sixty-six boats to the Yarmouth Fair. But, such a heavy reliance on a single industry can be problematic if there is a downturn in the dominant industry, and by the 1650s the fishing industry was showing signs of stress.

A number of factors conspired to set Brighton’s fishery into crisis. The Yarmouth fishermen began to apply increasingly restrictive practices in order to prevent outsiders from depleting the lucrative catch (Carder 1990). The situation became so bad for the Brighton fishermen that they were forced to petition parliament. Over-fishing in Channel and North Sea waters led to declining catches, and storms took an ongoing toll of boats and fishing houses on Brighton’s exposed beach. Furthermore, the fishing fleet was vulnerable to attack from pirates and privateers, as well as French fishing fleets competing for the mid-channel fishing grounds, and from the navies of Britain’s various enemies (which at different times in the sixteenth and seventeenth centuries included France, Spain and Holland). Worse still there was a decline in the demand for fish. By 1697 Brighton could only muster four boats to make the trip to the North Sea fishing grounds off the coast of Great Yarmouth. Rather than devoting all their efforts to the Brighton fishery many fishermen began to diversify and took up cargo trading along the coast to make ends meet. Brighton’s fishing boom was over.

The coup de grace to Brighton’s fishing economy was administered by nature. The wide beach which had allowed Brighton’s fishing community to pull up their boats and build the infrastructure necessary for fishing was particularly vulnerable to the storms of the English Channel and the erosion that they caused. This erosion was a process that had been ongoing for centuries. As early as the 1340s it was recorded that the sea had swallowed 40 acres of farmland around Brighton. But even as late as 1665 there were still 113 shops, cottages and other buildings in the Lower town, until a violent storm washed away 22 copyhold houses and their associated land that year. Two great storms in 1703 and 1705 finally consumed the last vestiges of medieval Brighton. A further 113 houses, including an entire street called South Street, with part of the blockhouse and the town gates, on the cliff, were all destroyed (Anon 1837: 5). As Defoe commented the town was ‘devoured by water’.

In the early 1700s the town commissioners had to apply for ‘poor relief’ because of the poverty of the town. By the 1720s Daniel Defoe described Brighton as “a poor fishing town, old built” in his book ‘A tour through England and Wales’ (1724). Fishing still continued in the town but it would never again dominate the economy of the town. As the eighteenth century progressed the town gradually transformed itself into a tourist resort. Fishing still continued in the town, even as late as 1770 300 men and 100 boats were still involved in the fishery.

The fundamental change to Brighton’s economy occurred when the Prince Regent decided to adopt Brighton as his seaside retreat (Berry 2002). The arrival of the court and high society who associated with the Prince caused a fundamental shift in the social structure of the town. As the establishment of the town began to orient itself to the new social elite the attitudes towards the fishing community began to harden. There are a number of references to the conflicts between the fishermen and the increasing numbers of tourists.

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8 It is only necessary to look at the socio-economic impact of the loss of the coal mines in the UK since the 1950s to see how single economy towns can be devastated by the loss of their principal industry.

9 The ‘Dunkirks’ – privateers sailing from Dunkirk in the Spanish Netherlands were a particular problem prompting the fishermen to present a petition to Parliament.

10 The 1703 storm took place on the night of November 27 and was recorded as being “A very great and remarkable tempest.”
Fishing nets were spread on the area of land on the east side of the Pavilion called the Steine in the spring and during the later part of the winter boats were pulled up onto it. This was a “privilege, time immemorial, granted to the fishermen” (Pennant 1801: 71). But Brighton’s new visitors were particularly scathing of such ancient customs; “we are frequently tripped up by entangling (our) feet” in the fishing nets “and if any of the barbarians to whom the nets belong should be standing by, you are sure to be reprobated and insulted.” And the press, whose principal audience was the new social elite, noted that “nothing can induce the fishermen to give up their customs here.”

The Poor Law officers painted a negative picture of the fishermen recording that many “are idle and drunken. They get enough money in the summer nearly to maintain themselves and families thro’ the winter. But idleness and drunkenness consumes that which ought to be laid up for a rainy day.”

The 1820s was a bleak decade for the Brighton Fishery. Brighton was a town undergoing an immense change as a tourist town, the Royal Pavilion had been completed in its present form and the townscape was changing beyond recognition. As increasing numbers of traders and lodging-houses competed for space overlooking the Prince’s Pavilion, the area of land used by the fishermen to repair their nets became a contested space. Gradually the power of the establishment began to undermine the ancient rights of the fishing community. In 1821 the High Constable at the Quarter Session removed the fishermen’s rights to haul boats up to the lower Steine. By the end of the year the Town Commissioners had the Steine enclosed. The fishermen were unable to stem the erosion of their rights. The final remnant of the fishing industry was a capstan on the beach for drawing up boats and this was removed on order of the Town Commissioners in 1827, although it did induce a riot on the part of the fishermen.

As Brighton began to spread along the cliff edge, the Town Commissioners widened the seafront road, the selling of fish was banned on the streets of Brighton and the fish market was moved to the seafront below the cliff edge. In a single decade the very essence of Brighton’s fishing industry had been fundamentally changed.

A hint of this transitional decade has been captured in the painting the ‘Chain Pier, Brighton’ by the painter John Constable (1776-1837) an oil on canvas produced between 1826-7. Constable first visited Brighton in 1824, in the hope that the waters and sea air would restore his wife Maria’s health. They were frequent visitors during the mid-1820s, but although he made many drawings and sketches, ‘The Chain Pier, Brighton’ is his only known large painting of the town. Constable highlights this metamorphosis in the foreground of his painting showing the ‘old world’ of fishermen on the beach working on their boats, but in the mid and far distance the future of the town is clearly evident. This ‘new world’ is represented by windswept tourists promenading on the beach while on the seafront in the distance gleaming new hotels such as the Royal Albion are seen, as is, of course, the object of the painting the Chain Pier (opened in 1823) built for the pleasure of the new tourists. This painting shows the town at its moment of social and cultural transformation11.

The fishing community was fundamentally different to the new Brighton that was growing up around them. Charles Fleet considered the fishermen to be the “only portion of our community that possesses any marked character … presenting a dress, language and manners, a marked contrast to those around them.” He noted that when ashore, a fisherman was “a most quiet, inoffensive, good-humoured being, disposed to interfere with nobody … quietly smoking his pipe and looking at the beach or tarring his boat or mending his nets.” The fishermen were “a sober industrious body of people, employed throughout the greatest part of the year in a succession of labour.”

The coming of the railway to Brighton in 1840 meant that the nature of the visitor began to change. Large numbers of working class day trippers came down from London. The fishing

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11 The painting is now housed in Tate Britain, London, after its purchase by the institution in 1950.
community began to supplement its income by providing boat trips for the visitors (see Figure 13). During the mid-nineteenth century “about 200 pleasure boats” worked the beach. As *Kidd’s Picturesque Pocket Companion* noted “Few places are so well provided with sailing vessels as Brighton.” Brighton had the largest fishing fleet in the south east until the end of the nineteenth century.

![Figure 12: The Lower Prom arches in the spring of 1892.](image)

In the 1880s the Town Council wanted to widen the seafront road once more. To achieve this a series of arches were built out onto the beach to support the wider road (see Figure 12). Much of the beach front had boathouses and other buildings associated with the fishery which needed to be demolished in order to make way for the road widening. The council ensured that the fishermen and boat men were compensated for their loss by providing them with some of the new arches in the Lower Prom at a nominal rent to produce and maintain their nets.\(^\text{12}\)

Three of the arches were devoted towards the collective use of the fishermen. The westernmost of these arches was first used as a school room and a reading room, and later became a “refreshment and smoking room”. It also served as the headquarters of a number of voluntary organisations including the Brighton Fishermen’s Penny Bank Loan Fund. The central arch was used for meetings, lectures, and festive social occasions. The easternmost arch was divided up into pens and used for net mending and storage by the smaller boat owners. The communal arch was subject to a nominal rent which was paid by the fishermen who subscribed to a central fund (Durr 1995: 232).

\(^\text{12}\) This area is now known as the fishing quarter.
Figure 13: The arches above where the Fishing Museum now stands at the end of the nineteenth century, showing the use of fishing boats as pleasure craft.
The fishing industry witnessed a further decline after the First World War. The development of effective refrigeration allowed fish to be imported into Brighton by train. By 1948 Brighton only supported forty-eight fishing boats. At the end of the Second World War the arches began to change in character. The central arch was no longer used for lectures and became a communal arch, the western arch became a social club, because of which it became subject to market rent. When the club failed in the 1980s the arch reverted back to council ownership. With this loss, only two of the three original arches remained for the collective use of the fishermen. They still paid a nominal rent into a central fund that was managed by the Commercial Fisherman’s Association.

7.2 The creation of the museum

In the late 1980s Brighton Council embarked on a project of improving the seafront\textsuperscript{13}, the fishermen feared that the council would attempt to impose a market rent on their remaining arches. If this were the case then the fishermen would almost certainly have to give up the arches, because the commercial rents would be considerably more than they could afford – prime seafront rent. The fishing community saw this rent review as potentially being another erosion of their rights that had been going on since the time of the Prince Regent.

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{lower_prom_arcs_1992.jpg}
\caption{The Lower Prom arches in the autumn of 1992}
\end{figure}

Two men took the lead in the fight to create a fishing museum. Alan Hayes was Chairman of the Commercial Fisherman’s Association and local skipper, Andy Durr at the time was Vice Chair of the Arts and Leisure Committee and a lecturer at the University of Brighton. Both

\textsuperscript{13} The previous council’s attempts to ‘improve’ the seafront resulted in the closure of the seafront fish market, because of the undesirable smell (Durr 1995: 232-233).
began to exert whatever influence they could in order to get the project off the ground. The fishermen now argued that the arches were a tourist attraction, they had long realised that “visitors like to look in and see us making up our nets and have a chat” (Durr 1995: 233).

The Council in conjunction with the South East Tourist Board, and the East Sussex County Council, commissioned Conrad Roche Consultants to investigate its potential for improvement. In 1992 draft proposals for the use of the seafront were put out for public consultation. At this early stage a ‘Fishing Quarter’ was not on the agenda. The public consultation was used as a vehicle to put Brighton’s fishing industry on the public map. By November 1992 the report presented to the City council had recommendations for both a museum and a fishing quarter.

In March 1993 thirteen arches were given over to a Fishing Quarter. In this setup the rents were based on the fishermen’s means rather than the maximum commercial rents that could be achieved for seafront property. Simultaneously, £130,000 was allocated towards the restoration of the semi-derelict arches, the road was moved to create an area for the fishermen to mend their nets, and modern infrastructure was provided to sell wet fish. Work took place between November 1993 and May 1994.

At the beginning the place was “a set of damp arches. The fronts of the arches were falling apart and had not been touched for years; a thin road and a parking bay in front of them and a shell fish stall that opened on weekends” (Durr 1995, see Figure 14).

The Central arch was given up by the Fishermen’s Association to a Fishing Museum Trust composed of three fishermen, a council member and Andy Durr. The fishermen moved to the arch formally occupied by the social club. The Trust was then left with the central arch to house a museum. However, the creation of the fishing museum was challenging. The professional museum community had envisaged a ‘fishing centre’ which was in fact a visitor centre with no actual objects from Brighton’s fishing industry. It was also estimated to cost £60,000, money which was simply not available.

The Fishing Museum has always been a community project. Even at the onset in February 1994 the arch was cleared with help from the fishermen and students from Brighton University. The council removed internal brick structures and did the appropriate electrical work which left a large cavernous arch for fitting out as a museum.

The principal artefact was a 27 foot long clinker built fishing boat that had been made available by fishermen of Hastings. The boat had been constructed by Lowers in Newhaven who were responsible for producing many of Brighton’s fishing boats.

This encouraging start to the museum was followed by a near catastrophe. The arch was found to have dry rot and the Trust had no money to fix the problem. It is here that the community nature of the museum reveals its importance. It was February 1994 and the weather prevented the fishing fleet from going out – the fishermen decided to raise the money for the repairs themselves. They managed to raise about £150 from their own pockets, and using their skills in construction took the floor out, treated the space and laid new flooring.

By March grant money began to arrive, including £5,000 from the English Tourist Board and East Sussex County Council, and £3,000 from the Community Halls Fund. This money was used to purchase materials to replace the rest of the flooring, build a staircase around the boat, build a dry room, and paint the arch.

The voluntary trust was firmly dedicated to education as its underlying principal. As such, charging an admission fee would have detracted from these fundamental goals. Because of the education and public amenity of the museum the council waived the rent.

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14 Many of the fishermen had a variety of skills in construction which they used to gain an income when they were unable to fish.
The museum has also been supported by professional partners – without which the project would have been considerably more difficult. These included the University of Brighton, who supported Andy Durr’s work on the site as part of their commitment to community involvement. The Brighton Museum service also made a large contribution in resources. Artefacts from their collections were lent to the museum, staff advised on the best ways of doing things and the required standards. Together the University and Brighton Museum Service provided the extra knowledge and resources required to set up the museum.

In May 1994 the Museum was officially opened by the Lord Lieutenant of the County, in the presence of the Mayors of both Brighton and Dieppe. The Fishing Museum has since provided an important boost to the identity and economy of the seafront. The free entry in conjunction with the prime location is a strong incentive for both tourists and residents to visit the site. The museum also provides a focus and anchor for the surrounding shops of the fishing quarter.

### 7.3 Sustainability

There has been an increasing awareness among heritage site managers that one of the most important assets they have for income generation is their buildings. Obviously, the buildings can provide the *raison d’etre* for visiting a heritage site. But the buildings can also provide an income stream through rental.

![Figure 15: The average net profit achieved in 2003-4 from the trading income streams of 17 selected UK museums (modified from National Audit Office 2004: 4)](image)

The importance of the use of tangible bricks and mortar assets as a means of sustainability is becoming increasingly prominent in the heritage sector. Research by the National Audit office into 17 museums for the trading year 2002-3 revealed that venue hire was the most profitable\textsuperscript{15} income stream with profits ranging between 25 and 70% (see Figure 15, National Audit Office 2004: 3) this consistently out performs other income producing methods at heritage sites (including retail, cafes, etc).

Although the National Audit Office figures refer to traditional venue hire such as weddings and conferences, the concept can take a number of forms:

\textsuperscript{15} Profit was defined as profit after direct costs and overheads as a percentage of turnover (National Audit Office 2004: 4).
• **Function rooms**: The earliest exploitation of heritage building infrastructure outside of charging for entry was through the use of renting rooms for functions such as conferences, meetings, etc. The range of potential options for room rental increased when UK law allowed weddings to take place in buildings other than churches and registry offices.

• **Lodgings**: Many heritage buildings have rare and unique architecture, historical associations, or sought-after settings. These features can provide heritage sites with a competitive edge in the market for lodging. The use of heritage properties as interesting and unusual spaces to stay has been long established by the Landmark Trust and, as of 2006, by English Heritage.

• **Other rental opportunities**: Of course, not all heritage sites have rooms that can be converted to lodgings, or have sufficiently inspiring buildings for attracting staying visitors. Of course, property can have value and can be used for other purposes. Brighton Fishing Museum rents out part of the space as a workshop.

These can all supplement revenue streams. The decrease in funds for heritage sites makes the diversification of income streams an essential pre-requisite for many heritage institutions.

### 7.4 Conclusions

To the fishing community the ‘golden age’ of the fishing industry heralds from the time before the Prince Regent arrived in Brighton. The Fishing Museum is an attempt to preserve some small element of the community’s identity.

The sustainability of the museum is achieved through the use of the income provided by the annual rental of the eastern arch. Because of this the site can support free entry for visitors, which means that the fishing museum is visited by a diverse range of people, many of whom might not visit a museum under normal circumstances.

From a purely financial perspective a museum is not the most commercially viable use of space on the seafront. But such financial arguments miss the point:

- There are already many bars and cafes along the seafront – the museum and fishing quarter add variety to what could be a homogenous area.

- A museum is beneficial for visitors because it adds to the critical mass of potential attractions.

- It is a free attraction which means that it has a highly diverse audience, coupled with its prime location on the beach allows it to attract a vast number of visitors who would not normally visit a ‘museum’ (c150,000 visitors per annum).

- Because of this, the accessibility and inclusion of the site is increased. And therefore, the potential impact of the site is increased.

- And of course, the museum helps preserve the community identity of the fishing community.

As with many heritage sites the net benefits that accrue to the Fishing Museum are evident but not easy to measure. Simplistic financial measures are inappropriate to capture such contributions to society.
Figure 16: The Fishing Museum at the heart of the ‘fishing quarter’ makes a dynamic contribution to the seafront

References

Anon (1837) *Brighton as it was in 1836*, Willis’s: Brighton.


8 Assessing residents values for the Royal Pavilion using contingent valuation

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The Contingent Valuation Method (CVM) is the most widely used econometric technique for valuing non-market cultural goods. Two different methods are available to determine the value trade-off in CVM. These are Willingness to Pay (WTP) and Willingness to Accept (WTA). The two methods have long been known to yield different results, this chapter compares the results of the application the two valuation techniques to the Royal Pavilion Palace, Brighton, UK.

8.1 Introduction

The Royal Pavilion Palace has been used as a laboratory case for the study of multiple evaluation methods for the study of impact. A stakeholder analysis conducted in 2005 highlighted the importance of the perceived role of the economic impact of the Royal Pavilion on the town. It also highlighted the fact that there was another set of values – ‘iconic’ and ‘aesthetics’ which was also perceived to be important by the key informants. Using the stakeholder analysis as the guide it was decided to attempt to assess the non-use values such as the ‘iconic value’ of the Pavilion Palace.

8.2 Contingent valuation

Most cultural heritage goods and services are not traded in traditional markets; furthermore, they are often not closely related to any marketed goods. In these cases it is impossible for economic analysts to use an individual’s market purchases to determine their willingness to pay for cultural heritage goods. Furthermore, the retrospective nature of revealed preference techniques makes it problematic to predict future activity. These limitations go some way to explaining why revealed preference techniques are not widely used in the cultural heritage arena (Hansen et al. 1998). In this field stated preference surveys using hypothetical scenarios have been widely used to ask individuals directly what they are willing to pay for a good (WTP) or service or what they would be willing to accept as compensation for its loss (WTA).

Stated preference techniques encompass two principal methodologies. The contingent Valuation Method (CVM) and a family of techniques called choice experiments. Until recently most economic valuations in the heritage sector have focused on the use of CVM rather than choice experiments although there are indications that there is increased interest in the latter (cf. Alberini et al. 2003, Maddison and Foster 2003, Mazzanti 2003a, 2003b, and Apostolakis and Jaffry 2005).

The contingent valuation method (CVM) is a non-market valuation technique based on stated preference, which tries to extract an estimation of the ‘willingness to pay’ (WTP) for a good or service from users and non-users. It is designed to capture the value of a cultural heritage site or the value of some potential investment in a site. Ready and Navrud (2002a: 6) explain willingness to pay as:

“the value that a person gets from being able to enjoy a cultural heritage good is defined as the largest amount of money that that person would willingly pay to have that opportunity.”

Contingent valuation is the principal method for determining a financial value for non-use values in cultural heritage. Because, these ‘passive use’ values do not involve a market and may not even involve direct participation, they are extremely difficult to quantify. They
include amongst others option, existence, and bequest benefits. In the current climate of diminishing funds for the cultural heritage sector, there is increasing urgency in assigning a financial value to non-use and passive use at cultural heritage sites. Individuals are obviously willing to pay for non-use, or passive use, but traditional economic analyses tend to treat these benefits as zero. Since people do not reveal their willingness to pay for them through their purchases or by their behaviour, the only option for estimating a value is through the use of survey techniques. The most widely used stated preference technique is the contingent valuation method (King and Mazzotta 2005).

The contingent valuation method was first proposed in 1947, although it was not until the mid-1950s that it was first applied in a Harvard Ph.D. thesis that attempted to measure the economic value of recreation in woodlands in Maine. This first practical application unleashed a flood of further valuation studies broadly in the field of recreational and environmental economics.

Numerous applications of the method to various public goods and studies of its methodological properties were conducted from the 1970s onwards. A review of the use of contingent valuation by Carson et al. (2000) found more than 2,000 academic and other papers on the subject. These studies are mainly from the environmental arena but also cover the fields of transport, health, education, and the arts, from across the globe. By the middle of the first decade of the twenty-first century the world-wide total exceeds 2,500.

The issues associated with developing a financial estimate of economic value based on how individuals respond to questions about hypothetical market scenarios, as opposed to observing their actual behaviour, is a source of enormous controversy and debate. But, considerable endorsement was given to the methodology in 1993, when the US National Oceanic and Atmospheric Administration (NOAA) published its report of the findings of its expert panel on the subject. The panel included a number of eminent social scientists, and was co-chaired by two Nobel laureates, Kenneth Arrow and Robert Solow.

The panel was charged with reviewing if contingent valuation measures of non-use value could be used to determine liability issues in the aftermath of the 1989 Exxon Valdez oil spill. The panel concluded that provided that contingent valuation studies are carried out following a number of stringent conditions that gave due consideration to the biases affecting the methodology, the technique “can produce estimates reliable enough to be the starting point of a judicial process of damage assessment, including lost passive-use values” (Arrow et al. 1993: 43). However, the panel did also note that “there will always be controversy where intangible losses have to be evaluated in monetary terms.” (Arrow et al. 1993: 45). Despite strenuous debate (which still continues i.e. Harrison 2002), further endorsement was given by Carson et al. (1996). There are indications that the contingent valuation method is gaining mainstream acceptance in Europe. The UK government recently commissioned a major CVM survey with 11,000 respondents designed to value the environmental costs and benefits of active quarries (London Economics 1999).

The contingent valuation method requires respondents to provide values based on hypothetical scenarios. Contingent valuations’ reliance on what respondents say they will do, rather than their actions, is paradoxically one of the method’s greatest attributes, and its most controversial feature (King and Mazzotta 2005). The method therefore, is not without controversy, and as a result it has the following advantages and disadvantages.

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16 The conceptual origins of the technique extend back to the nineteenth century notions of economic value posited by Jules Dupuit (1804-1866) and Alfred Marshall (1842-1924). Both realised that value could be expressed as a “tradeoff”. Dupuit considered that a measure of an “objects utility” was the “maximum sacrifice expressed in money which each consumer would be willing to make in order to acquire an object”. Working independently thirty-five years later Marshall defined the “economic measure” of a satisfaction as “that which a person would be just willing to pay for any satisfaction rather than go without it.” These concepts represent the early origins of Willingness to Pay theory in value studies.
8.2.1 Advantages of contingent valuation

- **Widely-tested**: Contingent valuation has been extensively used in the field of environmental economics (Carson et al. 2000) and is increasingly used in the arts and cultural field (Noonan 2002, 2003), and cultural heritage studies (Pearce et al. 2002). A considerable body of research has been undertaken and is being conducted to improve the methodology, make results more valid and reliable, and better understand its strengths and limitations.

- **Flexibility**: Contingent valuation is extremely flexible. It is the most widely-accepted method for estimating total economic value in cultural heritage sites (i.e. see Kaminski, et al. 2006, Navrud and Ready 2002). Its flexibility allows it to be used to provide values of all types of non-use, or ‘passive use’. It can also estimate use values, as well as existence values, option values, and bequest values. This is something that cannot be achieved using revealed preference methods alone.

- **Accessible results**: Even for non-economists the outputs and results of contingent valuation studies are not difficult to comprehend. Although many contend that the value of heritage sites should not be reduced to a financial value, monetary valuations are easily understood by all members of society. These financial values can be presented as a mean or median value per person, per household, or as an aggregate value for the population being studied.

8.2.2 Limitations of contingent valuation

The limitations of the technique encompass three main areas; these include general biases, survey biases and procedural biases:

**General**

- **Resource intensive**: Contingent valuation is highly resource intensive. A properly-conducted contingent valuation survey is both time-consuming and expensive because it requires the use of pre-testing (which is usually achieved through the use of focus groups, and a pilot survey), 250-500 interviews for open-ended surveys and 500-1000 interviews for closed-ended surveys, and a detailed statistical analysis of the data (Bateman et al. 2002: 110, Bennett 2000: 40). Unless conducted by academics, such a survey would require outside consultancy and would be beyond the financial means of most cultural heritage institutions. There is a tendency for the sites which have used CVM to be major national institutions or monuments, or the studies were academic projects.

- **Hypothetical versus real markets**: There is considerable debate as to whether hypothetical markets can be compared to real economic markets. The hypothetical context could affect respondent’s answers. Individuals may give a higher willingness to pay response if they know that the scenario is hypothetical and that they will not have to pay.

- **Experience and information**: Contingent valuation assumes that individuals are aware of the numerous values that heritage encapsulates. Individuals have much more experience in making choices with market goods, so their purchasing decisions in markets are likely to reflect their true willingness to pay. Contingent valuation assumes that people understand the good in question. Unfortunately, most individuals are unfamiliar with placing values on cultural heritage goods and services. If individuals are forced to value attributes with which they have moderate or no experience such as cultural heritage, then this can affect the results of a WTP survey. In these instances, the type and amount of information presented to respondents could affect their answers. A number of methodological studies have been conducted in the field of cultural heritage in order to determine the importance of information provision in contingent valuation surveys and the impact this has on respondents WTP (Riganti 1997, Riganti and Willis 2002).
- **Strategic response bias**: Individuals can give false responses during a survey in order to increase their personal net benefit. This can take the form of ‘free riding’ where individuals underbid because they feel others will pay more and they will still secure the good (Kerry Turner et. al. 1994, Ready and Navrud 2002b: 20). Alternatively, individuals may overbid in order to receive more of the good if they believe they will not have to pay.

- **Income-dependent**: WTP has a dependency on income. Individuals with a high disposable income can pay more for a non-market benefit. The preferences of higher income individuals may marginalise those of the less-well-off. Of course, this does mirror actual market conditions.

- **Interview bias**: It is possible that a respondent may overstate their willingness to pay in order to please the interviewer. With cultural heritage sites, respondents may feel it is ‘the right thing to do’ even if they do not value the good in question highly (Ready and Navrud 2002b: 20).

- **Question bias**: Related to interview bias a respondent may reveal their values about the act of giving for a social good (sometimes called the ‘warm glow’ effect) even though they believe that the specific good being surveyed is unimportant in itself.

- **Strategic bias**: Strategic bias arises when an individual deliberately biases their answers in order to attempt to influence a particular outcome (Winpenny 1991: 60).

- **Non-response bias**: When sampling respondents the bias inherent in non-response is problematic, because individuals who do not respond are usually likely to have different values to the individuals who do respond.

- **WTP and WTA**: Two different methodologies exist for determining the payment question. The most common is to ask individuals what they would be willing to pay (WTP) in order to preserve or retain the current level of goods and services at a cultural heritage site. Less commonly, individuals may be asked what they are willing to accept (WTA) as compensation for the loss of the goods and services provided by a cultural heritage site. Studies have shown that the two methodologies yield different results – WTA exceeds WTP (Bateman et. al. 2002, Winpenny 1991: 60). This has been seen by some as an indication that individuals’ responses are an expression of what they would like to happen, not real valuations.

- **External validation**: External validation of non-use values can be difficult.

**Survey biases**

- **Payment vehicle biases**: Research has shown that the willingness to pay amounts provided by individuals can be influenced by the payment vehicle used (sometimes referred to as instrument bias). A common form of questioning uses taxes as a payment vehicle, however, some users may feel strongly about increased taxes and their responses may be a protest against this rather than their actual value for the good. It is essential that “the payment vehicle must not in itself be objectionable to the respondents” (Ready and Navrud 2002b: 22). Alternatively, if payment vehicles such as taxation are used, further exploration should be conducted as to why respondents were not willing to pay.

- **Starting point biases**: An early contingent valuation methodology was Sequential Bid. Individuals were given a starting bid, which was then increased or decreased based upon whether the respondent was willing or refused to pay the amount in question. Research has shown that the choice of starting bid has a strong influence on the outcome of willingness to pay (Kerry Turner et. al. 1994, King and Mazzotta 2005, Winpenny 1991: 60).
Other issues

Despite the wide use and extensive research into the technique in the last two decades, there are still many authorities who do not accept the results of contingent valuation. There is considerable debate in the research community over whether it adequately measures people’s willingness to pay for a cultural heritage good or service. A number of economists, psychologists, and sociologists question the financial estimates that result from contingent valuation (King and Mazzotta 2005). Of course, this is countered by the acceptance of the method by national governments (such as the UK and US).

This apparently long list of disadvantages associated with contingent valuation methodologies is a function of the widespread and extensive study of the technique in the environmental and now the cultural heritage arenas. Contingent valuation should be part of a wider decision-making process and not a stand-alone tool. The known methodological biases of contingent valuation should be avoided as far as possible and the results treated with reasonable caution.

8.3 Residents values for the Royal Pavilion

Interviews with key respondents in Brighton revealed that considerable significance was placed on the ‘iconic value’ of the Royal Pavilion. As with most ‘non-use’ values such a concept is hard to quantify in economic terms. Also, it was unclear if non-use values were widely held by residents of the town. In order to assess these values the contingent valuation method (CVM) was deployed in a survey instrument for Brighton residents. CVM was chosen because it was a method that:

- Could provide a means of elucidating individuals ‘total economic value’ for the Royal Pavilion (i.e. use value, existence value, option values, and bequest values), and
- Is widely used in other sectors\(^\text{17}\), and using a standard template such as the MLA Bolton survey could allow the possibility for comparison between sites.

CVM was also chosen to see how practical the technique would be for internal use by heritage sites, and its applicability for valuing ICT applications and deployments at heritage sites. The Bolton survey states that “consumer surplus methodology as demonstrated by the contingent valuation technique can be applied to Local Authority museum, library and archive service.”

8.4 The Brighton survey

The face-to-face interviews took place between March and July 2006, and gave rise to 650 valid questionnaires. Interviews took place on both weekdays and weekends between 10.00 am and 6.00 pm. The interviewers were tasked with interviewing equal numbers of visitors and residents. In order to ensure that a broad spectrum of visitors and residents were interviewed seven survey sites were chosen cross the city. These included five sites in the city centre:

- Brighton Railway station
- The Palace Pier
- The Pavilion and its environs
- The town hall
- Churchill Square shopping complex.

\(^{17}\) The use of contingent valuation is comparatively rare in UK museums. Stated preference techniques have been employed at the British Museum (Maddison and Foster 2003), and contingent valuation has been used at the British Library (Pung \textit{et al.} 2004) and the MLA’s Bolton Museums and archives service (BMRC and MLA 2005).
These sites were complemented by two outlying collection points on the eastern and western borders of Brighton and Hove at Brighton Marina and George Street, Hove. The combination of these collection sites provides a sufficiently wide geographical spread.

The Brighton Pavilion survey used questions derived from the Museums, Library and Archive Council’s (MLA) valuation questions from the Bolton survey (2005). Using this as a ‘template’ could allow for comparison of results.

8.4.1 Results for the residents

The following outcomes were obtained from the survey:

- 307 respondents were Brighton residents (this was determined by ascertaining if the respondent paid council tax to Brighton and Hove City Council)
- 45% (138) had visited the Pavilion in the last 2 years (users), 55% (169) had not (non-users)
- 58% had visited the Pavilion in their lifetime and 42% had not
- 297 responses were used for the CVM analysis

Calculating WTP

The instrument used an open-ended willingness to pay (WTP) valuation question:

“At the moment the Royal Pavilion is funded in part using revenue funding from Brighton and Hove City Council. If the revenue support ended would you be willing to make a contribution to continue the services provided by the Royal Pavilion?

We stress that we are trying to determine what you think the Royal Pavilion is worth – there is no intention to remove public funding.”

The results from the 297 useable responses yielded an overall Willingness to Pay (WTP) of:

\[
\begin{align*}
\text{WTP} &= £3.67 \text{ per user per month} \\
&= £44.04 \text{ per user per annum} \\
\text{WTP} &= £1.42 \text{ per non-user per month} \\
&= £17.04 \text{ per non-user per annum}
\end{align*}
\]

The only significant difference between the Brighton survey and the Bolton Survey was the definition of users and non-users and so the aggregated results would differ. The Bolton survey defined the user population as those who had visited the Bolton Museums and Archives in the last year. This is a highly appropriate definition for the Museums, libraries and archives which by their very nature have the potential to bring users back for regular repeat visits. A historic structure such as the Royal Pavilion represents a different cultural resource compared to museums or archives services. Here the content is far more static compared to the constantly changing exhibits found in many museums, or the content of libraries and archives. This needs to be taken into account when defining who are users and non-users at various sites.

Two potential definitions of users and non-users could be postulated for heritage sites such as the Royal Pavilion. Users could be considered to be those who have visited the site within the last two years (i.e. 45% (138) had visited the Pavilion in the last 2 years). However, the issue that is being considered is the value that residents place on the Pavilion. It is contended that any visit to the site during a respondent’s lifetime would alter their perception of the value of the site. This would obviously make comparison with the results of the Bolton survey problematic because, if lifetime users were considered in that survey then the aggregated results would have been considerably higher.
Estimated number of Brighton residents that have visited the Pavilion = 58% of 208,985\textsuperscript{18}

User value is:

\[ 121,162 \times £44.04 = £5,335,974 \]

Non-users value is:

\[ 87,823 \times £17.04 = £1,496,503 \]

When user and non-users values were aggregated up to the population of Brighton, the resident’s annual WTP values for the Royal Pavilion was £6,832,477.

**WTP and age**

It is clear from the sample that there is a significant link between the respondent’s willingness to pay any amount and their age (see Figure 17).

This is most evident in the 16-25 year old age group. Here both income and attitudinal issues are prominent. As the age of respondents increases the number of positive responses for willingness to pay increases at the expense of negative responses. The ‘Don’t know’ responses are moderately consistent in the age groups above 26.

![Figure 17: The correlation between WTP (any amount) and age](image)

This leads to a strategic issue of should museums and heritage sites attempt to engage the 16-25 age group and if so how? The potential for technology to be used in this arena is significant. Internet (and derivatives such as Second Life), 3D visualisations, and educational games all have the potential to enhance the experience of users in this age group.

The alternative is accepting that this age group will always be problematic and focus service provision towards older age brackets which have the potential to provide more ‘return on investment’. Obviously, with many European governments linking publicly funded museums to educational goals and social engineering this is an unlikely scenario.

\[ \text{18 The population of Brighton over the age of 15 = 208,985 (UK Census Data 2001)} \]
Negative perceptions

The Royal Pavilion is an iconic structure, but, not all residents appreciate the Pavilion. The cost of its maintenance is problematic for those who do not appreciate the structure, because it is owned by the Council all residents contribute to its upkeep. Certainly, the Pavilion has evoked strong opinions throughout its history.

Early commentators were derisive of the structure. Sydney Smith stated that “One would think that St. Paul’s Cathedral had come to Brighton and pupped.” It was “a building that could only have been created for an individual who had great confidence in his own taste and was mostly indifferent to the opinion of others” (Rutherford 2003: 12). Attitudes in contemporary Brighton are no different. The number of zero bids provides an indication of this. However, the Pavilion also evokes strong positive values as seen by the number of bids over £5 per month.

It is clear that overall Brighton residents place considerable value on the Royal Pavilion. The use value alone is a key indication that the financial resources that have been devoted to the Pavilion are justified. Of course, the non-use value indicates that there is a wider value associated with the Pavilion.

8.4.2 Applicability to the heritage sector

The full questionnaire took approximately 15 minutes to administer. Although the valuation questions comprise a small component of the overall questionnaire there are still time and cost implications for conducting a CVM survey in a robust manner, such that it will satisfy the NOAA criteria.

A statistically significant sample of 200-300 respondents would incur a minimum 50-75 hours field work. This in conjunction with data entry (unless automated systems are used) and analysis time equates to considerable financial commitments. These costs are especially evident if external specialists are used.

These resources are beyond the funding capabilities of most heritage sites. The kinds of sites that can finance these surveys tend to be larger national institutions (i.e. the British Library) or institutions which have external support (Bolton Museums in conjunction with the MLA). Alternatively, the work is conducted as part of university-based research projects; this brings a further bias into the types of studies conducted. The cost can be reduced by using internal staff to conduct the survey, but this can be a false economy. Considerable training is needed to ensure that those conducting the surveys do not lead the respondents. It is often the case that when CVM surveys are conducted cheaply the quality suffers.

8.5 Conclusions

The role of cultural heritage in society is clearly changing. Political forces require more and more justification of investments in the cultural heritage sector. But unless new or external resources are devoted towards the deployment of major CVM surveys, or resources are diverted from operations, the technique is too costly to deploy. At a time when financial resources in the sector are stretched to breaking point it is a difficult decision to devote resources to valuation studies when funding is needed for core functions.

References


9 The Royal Pavilion Palace, Brighton: values and perceptions

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This chapter explores the notion that an approximate value for the contribution a heritage site makes to the visitor economy can be obtained, whilst taking into account the resource limitations of the heritage sector. This information could then have strategic value for the marketing and operations of the site.

“The nearest watering place to London, Brighthelmston, has long been the most frequented, and now is without exception, one of the most fashionable towns in the kingdom.”

The Brighthelmston Directory for 1800

9.1 Introduction

This chapter explores the notion that an approximate value for the contribution a heritage site makes to the visitor economy can be obtained, whilst taking into account the resource limitations of the heritage sector. This information could then have strategic value for the marketing and operations of the site. The following data is derived from the Royal Pavilion, Brighton.

9.2 The cultural good

In order to assess values and perceptions it is necessary to understand the nature of the cultural good being studied. The Royal Pavilion is intimately linked with both the development of Brighton and the seaside.

From the 1650s onwards the British landowning, professional and commercial classes became increasingly affluent. From this time onwards a new type of town began to provide services for these new classes. Inland Spas such as Tunbridge Wells, Bath and Cheltenham exploited the health-giving properties of their mineral springs to attract this new social elite. Initially these towns were given the epithet ‘Wells’, then they were called ‘Spas’ after the eponymous town of Spa in the Ardennes.

Importantly, the restorative qualities of the waters were only part of the attraction of these new spa towns. An intricate social life developed in such places centred on the libraries, assembly rooms, baths and sometimes theatres. This made the visit to the spas an important part of the social calendar for society’s elite. The development of facilities in the spa towns acted as a further stimulus for visitors. At first these early ‘health resorts’ were based on ground water, such as wells and mineral springs, but gradually during the 1720s and 30s sea-bathing became a fashionable pastime for both the upper and middle classes.

The first reference to sea bathing in Brighton comes from 1736 in a letter sent from Brighton by the Reverend William Clarke, Rector of Buxted, to his friend Mr. Bowyer in London on July 22. He begins his letter

“We are now sunning ourselves upon the beach at Brighthelmston ... my morning business is bathing in the sea, and then buying fish; the evening is riding out for air, viewing the remains of old Saxon camps, and counting the ships in the road, and the boats that are trawling.” (Erredge 1862: 219)
Brighton’s early tourist industry was small. The town was not well known and did not have the infrastructure to accommodate many visitors. This changed in 1750 when Dr Richard Russell, a physician from Lewes, published his ‘Dissertation on the use of sea water in the diseases of the gland’. This book advocated the use of sea water for its health-giving properties. Patients could be required to bathe in the water, drink it, or both depending on their ailments. As Melville (1909: 28) noted

“People then, as now, would suffer much temporary discomfort if they were convinced that at this cost their health would be improved for an indefinite period, and so in spite of all its drawbacks, invalids in steadily increasing numbers came regularly every summer.”

Although Russell died in 1759 the publication of further pamphlets and books by his successors on the recuperative properties of sea water and sea air only increased Brighton’s reputation, such that it started to attract royalty. Even though George III preferred to take the waters at Weymouth the king’s brothers much preferred Brighton. The Duke of Gloucester visited in 1765, the Duke of York followed in 1766, and the Duke of Cumberland stayed regularly from 1771. By the time George, the then Prince of Wales, first visited the town in 1783 to stay with his uncle the Duke of Gloucester Brighton was already established as one of the principal seaside resorts in the country. The Prince returned the following year and possibly in 1785. During these stays he resided at Grove House. In 1786 the Clerk of the Prince’s Kitchen, Louis Weltje took a lease on the Prince’s instructions for the house next door, then owned by Thomas Kemp. Weltje had been able to secure a lease of Kemp’s Farmhouse at £150 per annum, with the option to purchase the freehold for £3000. The following year Weltje purchased the property from Kemp. The Prince commissioned Henry Holland the architect who had been working on Carlton House, London to build a new house on the site. It was the Prince’s decision to locate his seaside villa, Marine Pavilion, overlooking the Steine that was to truly elevate Brighton’s fortunes. The ‘Marine Pavilion’ was rapidly constructed and furnished at a cost of £22,338 and the Prince was residing there by July, 1787.

“The Marine Pavilion, or summer retreat of the Prince, is certainly a considerable ornament to Brighton; though not elegant, it is a pleasant object, and operates to divert the eyes of the perambulators on the Steyne from the dismal contemplation of russet-clad hills and treeless valleys.” (Anon 1787: 2)

The early Marine Pavilion was a circular building attached to two wings. The south wing was Kemp’s farmhouse, but the domed central part and the north wing were entirely new. The Pavilion was the principal attraction in the town as attested by Carey (1799: 60):

“There is nothing here to arrest the traveller’s attention but the Prince’s Pavilion, which is more a temporary convenience for the summer than a splendid object of admiration.”

By 1801 the Prince decided to enlarge the Marine Pavilion. Once again he commissioned Henry Holland who between 1801 and 1803 added two wings to the east front of the building containing a dining room and additional drawing room (Dale 1950: 48). These new additions were decorated in the then fashionable Chinoiserie style by Frederick Crace who would be involved in all later stages of the development of the Pavilion.

In 1801 the Prince commissioned William Porden, who had been previously commissioned by his Mistress, Mrs. Fitzherbert, to build Steine House, to build the riding stables and the riding

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19 As Berry (2002: 101) notes Brighton was suited to a “highly urbane man who enjoyed the company of people from his own background. He was unlikely to have his seaside villa built beside a poverty-stricken village in the middle of nowhere without services, entertainment or accommodation for his other guests.”

20 In order to achieve such rapid construction times the Marine Pavilion simply incorporated Thomas Kemp’s farmhouse within its structure.
house. The stables (now known as the Dome) were completed in 1803 and the riding house (now known as the Corn Exchange) was completed in 1808.

The Porden’s grandiose riding stables now made the Marine Pavilion look understated in comparison and so the Prince asked Humphrey Repton to advise him regarding the most suitable style for remodelling the Marine Pavilion. At the time Repton was engaged in work at Sezincote, Gloucestershire which was built in the ‘Hindoo’ style. Repton recommended the style and produced architectural drawings for the Prince.

It was not however until 1812 that the Regent decided to remodel the Pavilion. He commissioned the services of John Nash, who began construction in 1815. The remodelling was completed by 1823, and the King spent part of the season that year in his Pavilion. However, he was only to revisit his palace two more times, in the winter of 1824-5 and early in 1827. Gradually the King began to retreat from the ever-growing crowds in Brighton to the seclusion of his cottage in Windsor. As Lewis Melville noted (1909: 168)

“His interest in that remarkable structure upon which he had squandered money so recklessly seems for all practical purposes to have ceased when the building operations were finished.”

9.2.1 The historical impact of the Pavilion on the town

Unlike the beaches at Hastings and Worthing the pebble Beach at Brighton is not particularly comfortable, and the water is deeper, but Brighton eclipsed its neighbours to the east and west. This is because during the Prince’s patronage the town became a fashionable social centre because of its royal associations. The town became the de facto seat of the Royal court for part of the year so those wishing to gain influence could not simply choose another sea bathing resort. For all practical purposes the period of the Prince’s residence during any year constituted the season (Melville 1909: 76). These visitors to Brighton, many of whom would have been from the upper echelons of society, would have been an additional bonus to the Brighton economy as they spent their money on food, lodgings, and entertainments of all sorts.

“This is one of the most important watering places in the Kingdom; not so much on account of its extent, elegance, or diversity of rural prospect, as its being the summer visiting place of His Royal Highness the Prince of Wales.” (Anon 1820: 18)

The Pavilion was George’s seaside villa – as such it meant that George spent time in Brighton – and that was what made Brighton more fashionable than any other seaside resort in the country at the time.

“The attendance of Royalty had the same effect on Brighton that it had on the fortunes of Bath Spa: “Bath … attracted fashionable society in the first half of the eighteenth century. Brighton, under the patronage of a Prince of Wales, drew it thither in the latter half” (Melville 1909: x).

The importance of Royal patronage to the town was a point that was not lost on the inhabitants of Brighton. A comment in the Sussex Weekly Advertiser highlights the effect the delay in the Prince’s visit to the town would cause:

“The pecuniary injury which the town must suffer from the regretted absence of the Monarch, is incalculable … trade of all descriptions must suffer in the consequent decrease of our fashionable population, and the tenantless state of our best houses.” (Anon 1820)

Catering for the influx of visitors to the town began to have an impact on the economy. By 1800 there were about 1,250 residences in Brighton, of these, 211 were lodging-houses (houses for renting to visitors), and a further 208 had lodgings or rooms available. So 34% of Brighton’s residential housing was in some way connected with providing lodging to visitors.
There were also 41 inns, a number of which were beginning the transition from predominantly drinking establishments to hotels (e.g. by 1803 the Ship Inn could sleep 60 guests).

At the beginning of the Prince’s links with Brighton the town was still contained within the medieval boundaries of North, West and East Street and supported only 3620 inhabitants. By the time of George’s last visit in 1827 the town had gained over 30,000 new inhabitants. The increase in Brighton’s population between 1811-1821 of 12,417 or over 102% was the “greatest individual percentage increase made by any town in England and Wales during one decade in the nineteenth century” (Gilbert 1968: 92-3).

In the 1830s economic recession and increasing competition from other seaside resorts curbed Brighton’s population and building boom (with population only growing by 13.5% between 1831 and 1841). The opening of the London to Brighton railway in 1841 led to Brighton’s second economic boom. The coming of the railway was such an important phenomena that between 1841 and 1851 the population rose by 18,908 (42%). But it was this additional influx of residents and visitors to the town would finally lead to the undoing of the Pavilion as a Royal residence. Queen Victoria did not appreciate the lack of privacy of the Pavilion and put the palace up for sale. The Pavilion was purchased by Brighton Corporation for £53,000 in 1850.

9.3 Perceptions of Brighton and the Pavilion

It is clear that the Pavilion has played a central role in the development of Brighton. Its historical origins has given it a prime position in the centre of the city, which has developed around it. The Royal Pavilion Palace, Brighton is still owned by Brighton and Hove City Council, and as such is the only ex-Royal Palace under council ownership in the country21.

In 2005 a series of interviews were conducted with the Pavilion’s stakeholders in Brighton. These ‘key respondents’ were asked about their perception of the value of the Pavilion to the town. The economic implications were clearly understood by all although no stakeholders could put a monetary figure on this. But, there were another set of values that were evident. Non-use values such as the aesthetics of the building and its iconic value to the town were also perceived by the stakeholders as being important.

9.3.1 The ‘Brighton survey’

It was necessary to compare the key respondent’s perceptions of the ‘economic value of the Pavilion to the perceptions of the general population. Also, it was decided to attempt to ascertain the economic worth of the site to the town, using a methodology that could be applied by heritage site managers. To achieve this a survey was conducted. Face-to-face interviews took place between March and July 2006, and gave rise to 650 valid questionnaires. Interviews took place on both weekdays and weekends between 10.00 am and 6.00 pm. The interviewers were tasked with interviewing equal numbers of visitors and residents. In order to ensure that a broad spectrum of visitors and residents were interviewed seven survey sites were chosen cross the city. These included five sites in the city centre:

- Brighton Railway station
- The Palace Pier
- The Pavilion and its environs
- The town hall and
- The Churchill Square shopping complex.

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21 The Pavilion is one of a number of heritage sites supported by the council. The others Brighton Museum and Art Gallery, Hove Museum and Art Gallery, the Booth Museum of Natural History, Preston Manor and West Blatchington Windmill.
These sites were complimented by two outlying collection points on the eastern and western borders of Brighton and Hove at Brighton Marina and George Street, Hove. The combination of these collection sites provides a sufficiently wide geographical spread.

9.3.2 The visitor intentions

Most visitors questioned were in Brighton for a day trip. This corresponds with other survey work which has been carried out in the city. It also highlights the accessibility of the city by road and rail from across the southeast – highlighting Brighton’s role as a regional centre. Shopping is the activity that draws most visitors to Brighton (see Figure 18). There are a number of reasons for this. Brighton is a regional centre for a considerable part of the southeast. There are no comparable sized regional centres until Portsmouth is reached to the west, Canterbury to the east and Guildford to the North (and the London conurbation).

![Figure 18: Activities that visitors intend to conduct during their visit to Brighton](image)

9.4 Perceptions

A number of questions were asked of Brighton’s residents and visitors in order to gauge how people perceive the historic structure and its relationship to the city.

What do you associate Brighton with?

The visitors and residents were asked an open question about what they associate Brighton with. The results were then aggregated into associated groups:

- **The Beach:** Brighton is a seaside city. 27.3% of the responses highlight this relationship with the seafront. The responses aggregated into this category included the beach, London with a beach, seafront, the sea, seaside, pebbles and cliffs.

- **Other:** With open questions such as these there will always be responses that cannot be easily integrated into groups. 12.7% of responses were classed in the ‘other’ category including; history, Prince Regent, London-by-the-Sea, theatres, young people, modern, Quadraphenia, women, rock, Marina, entertainment, food, dirty weekends, fish and chips, hotels, casino and nice city.

- **Nightlife:** The city has an active evening entertainments sector ranging from pubs to clubs. 10.8% of respondents associated the town with its nightlife, which is the second largest association. The responses aggregated together under nightlife included nightlife, clubs, clubbing, pubs, and a good night out.
Figure 19: What visitors associate with Brighton

- **The Pier**: these responses were for the Palace Pier, now called Brighton Pier, although the now derelict West Pier was mentioned. Having both the Beach and the pier in the top three responses, accounting for 38.1% of responses gives an indication of the importance of the seaside location to the city.

- **Atmosphere**: Brighton is a cultural centre that has both an active nightlife and an inclusive outlook. This leads to a vibrant atmosphere. 8% of respondents associated the city with ‘atmosphere’. Responses in this category included lively, young, cosmopolitan, buzzing, multicultural, relaxing, lovely, vibrant, cultural, and busy.

- **Gay life**: Brighton has a large gay community, such that it has been called the ‘Gay Capital’ of the UK. The gay scene has become an important part of the social life of the city and its tourist offer. 6.6% of respondents associated Brighton with the gay scene. Responses integrated into this category included gays, Pride Parade, homosexuals and gay capital.

- **Tourism**: Tourism is a big driver for Brighton’s economy. 6.1% of respondents associated tourism with the town. Responses included tourists, tourism, visitors, holidays and travelling.

- **Student life**: Brighton has a large student population, with two universities, and numerous language schools. 5% of respondents associated the town with student life. Responses included students, university and education.

- **Shopping**: Because Brighton is a regional centre shopping is perceived as important by 4.1% of respondents. Responses integrated into this category include shops, shopping, the Lanes and Churchill Square.

- **The Pavilion**: 3.3% of respondents associate the Royal Pavilion with the town.

- **Friends and family**: Responses integrated into this category include family, relatives, home.

- **Weather**: Brighton’s seaside location is highly influenced by the weather. The local economy is dependent on the weather and visitor’s perceptions are coloured by the weather during their visit. Responses in this category included nice weather, summer, sunshine, light, sunny, cold, bad weather and windy weather.
What effect does the Royal Pavilion have on Brighton?

The residents were asked an open question on their perception of the effect of the Pavilion on Brighton. The results were then aggregated into associated groups:

![Figure 20: Perceptions of effect the Royal Pavilion has on Brighton](image)

- **Tourism**: 50% of the respondents considered that tourism was the biggest effect of the Pavilion. This was by far the biggest perception among residents.
- **Icon**: At 9.9% the second biggest perception was that the Pavilion was an icon for the city. This corresponds to the pre-questionnaire stakeholder survey which also highlighted the importance of the Pavilion as an iconic structure.
- **History**: The Pavilion provides a historical structure for the city. Although Brighton has the largest collection of Georgian Buildings in Britain it does not have a large number of historical sites for the public to visit. The constant development of the heart of Brighton since the late eighteenth century has caused the destruction of many sites that would now be considered historical. The Pavilion is the most obvious historical site in the city.
- **Beauty**: The Pavilion and its environs in the heart of Brighton city centre are considered by 4.6% of the respondents as beautiful.
- **Other**: The open nature of the question has given rise to a number (12.1%) of individual answers that cannot be integrated into the above categories.

These results clearly corroborate the results of the stakeholder analysis conducted in 2005, which showed both the perception of the importance of the Pavilion as an economic driver for the city and as a iconic structure.

What do you associate the Pavilion with?

The residents and visitors were asked an open question about their associations with the Pavilion. The results were then aggregated into associated groups.

- **Royalty**: A quarter of the respondents (25.4%) unsurprisingly associated the building with royalty, although it was only under Royal ownership for 60 years. There was also some evidence of confusion amongst some residents as to the current ownership of the palace, some still thought it was under royal ownership despite it having been sold to the Corporation of Brighton in 1853.
- **History**: 17.4% of residents associate the Pavilion with history, which may overlap to some degree with the ‘Royalty’ category above. It is therefore clear that the majority of
residents associate the Pavilion with its historical past (which includes its royal past). The Pavilion is closely linked to the foundations of modern Brighton.

![Bar chart showing associations with the Royal Pavilion](image)

**Figure 21: What visitors and residents associate the Royal Pavilion with**

- **History**: 17.4% of residents associate the Pavilion with history, which may overlap to some degree with the ‘Royalty’ category above. It is therefore clear that the majority of residents associate the Pavilion with its historical past (which includes its royal past). The Pavilion is closely linked to the foundations of modern Brighton.

- **Architecture**: At 11.4% architecture is another key association that residents have for the Royal Pavilion. The Pavilion is an architecturally unique structure. There is nothing comparable in the UK. In the past this has led to extreme emotions, having been called “A palace the tastelessness of which is so remarkable that the humorists of two centuries have sharpened their wits upon it” (Melville 1909: 45). Although there are still those who take issue with the building most residents attitudes are softening. In today’s society residents are exposed to many different architectural styles in the media and on the ground. This helps to place the Pavilion in an architectural context. Furthermore, the bar for extreme architecture has moved considerably, and in contrast the Pavilion is beginning to look less out of place.

- **Tourism**: Brighton residents have a strong association between the Royal Pavilion and tourism (11%). This is borne out in other questions in this questionnaire. Residents see tourism as one of the key functions that the Pavilion plays in the Brighton and Hove economy.

- **India/East**: The associations between India and the east are hardly surprising. The ‘Hindoo’ style of the exterior is an amalgamation of Indian architectural forms, while the Chinoiserie (Chinese style) of the interior makes an unusual combination.

- **Gardens**: the Royal Pavilion gardens have an important place in the contemporary life of Brighton. The gardens are one of the few open spaces in the city centre accessible to all residents.

- **Brighton**: 2.5% of respondents associated the Pavilion with Brighton. Again the image of the Pavilion is intimately bound with the city. Whether on postcards, books, council documentation, taxis, or company logos the Pavilion is seen as a two and three-dimensional logo for the city.
9.5 Visitor and resident perceptions

Visitors and residents were asked if they felt that the Pavilion makes a contribution to the city’s economy, contributes to the image of the city and is a nationally important historical site?

![Visitor and resident perceptions of Pavilion](image)

It is clear that both visitors and residents understand that the Royal Pavilion is an economic driver behind the Brighton economy. They also see the site as an icon for the town and an important historical site. Upon further examination it was, however, evident that few could estimate the monetary value for the contribution that the site makes to the visitor economy.

9.6 The contribution of the site to the visitor economy

The long-term implications of both the construction of the Pavilion by the Prince and its purchase and preservation by the town can be seen in the success of the town as a tourist destination and the perceptions of the city by today’s residents. Brighton and Hove city council devotes considerable resources towards the upkeep of the historic fabric of the Royal Pavilion. Through the Brighton and Hove Museum’s service it also runs the site on a daily basis. One of services provided by the council is the Royal Pavilion web site (http://www.royalpavilion.org.uk/); this provides information about the site for the public. Because of the tourist nature of the site some visitors actually find out about the Pavilion on the internet. If these figures are integrated into a single measure they can be used to provide an approximation of the value a site has to the visitor economy and the added value that the internet site brings to the visitor economy.

To achieve this two values are needed:

- The value of the visitor economy
- The number of visitors who come to the city primarily to see the Pavilion

Together these figures can be used to determine the contribution that the web site makes to the local economy.
The value of the tourist economy to the town/city/area being studied can be obtained from sources such as local government, tourist information offices, etc.

The number of visitors who came to a location for the purpose of visiting the site being studied can be obtained from questionnaires either conducted on site, off site (for example by local government). For example, at the Royal Pavilion the question asked was: “What is your main reason for being in Brighton today?” Suggested responses could include: on holiday, day trip, work, visiting friends and family, study, shopping, and visiting the site being studied.Obviously, the more sources that this data can be acquired from the better for cross-correlation. In the Brighton survey visitor responses to the question “What is your main reason for being in Brighton today?” were obtained from both the face-to-face questionnaire and from the questionnaire on the audio guide handset.

This figure gives an indication of the number of visitors who came to the city specifically to see the Pavilion. The injection of capital into the city that these visitors make is therefore attributable to the Pavilion.

It is apparent that all these sources of information are easily accessible to a heritage site manager. The calculations are comparatively simple and can be done in-house without the need for expensive external resources.

The value of a heritage site to the tourist economy can be calculated as follows:

\[
\frac{V}{100} \times P_v - C_{ve}
\]

Where:

- \( (V) \) The value of the tourist economy to the town/city/area being studied.
- \( (P_v) \) The percentage (%) of visitors who came to a location principally for the purpose of visiting the site being studied.
- \( (C_{ve}) \) The value of the site to the tourist economy to the town/city/area being studied.

These data, if not collected already, are comparatively simple to acquire. The search for indicators, especially monetised ones, is an important part of the research agenda in the heritage field (as well as other sectors such as social enterprise).

### 9.6.1 Choice of measures and indicators

The choice of impact indicators and measures should be set against agreed criteria. The measure developed conforms to the following criteria:

- **Relevance**: Because of the nature of Brighton and Hove as a tourist city the contribution that the Royal Pavilion makes to that economy is crucial, especially considering the public funding of the site.
- **Availability**: The information needed to conduct the calculations is readily available.
- **Comparability**: If the technique is adopted at other heritage sites the method can be used as the basis for benchmarking on a case-by-case basis.
- **Cost of data collection**: Survey data is resource intensive to collect. But, many heritage sites do use questionnaires; the addition of the relevant questions would not increase the cost substantially. Furthermore, it has been shown at the Royal Pavilion that the ICT itself can be used to collect the data.
• *Complexity of formulating the measure:* The measure is comparatively simple to formulate and would not require external resources to implement. The analysis is relatively simple.

• *The limitations:* The methodology is easily accessible to heritage site managers; however, it does provide a yardstick measure. This is because of the following reasons:
  - The valuation is based on areas which have defined tourist (visitor) economy.
  - Small differences in the results from the questionnaires can have a big effect when extrapolated up to the level of visitor economy.
  - In order to enhance the accuracy of the contribution that a heritage site makes to the local economy, two or more sources for the question should be considered. This will make it apparent if the results are comparable and if the mean of the values is obtained this will help to reduce any biases inherent in the collection mechanisms. Increasing the number of acquisition mechanisms will increase the costs to a heritage site.

### 9.7 Monetising the value of the Royal Pavilion to the local economy

Two different data sources were used to determine how visitation was influenced by the Pavilion. The Brighton Survey asked the question: “Has your visit to Brighton been influenced by your wish to see the Pavilion?” The responses were from ‘not at all’ to ‘very much’. Furthermore, the audio guide handset questionnaire asked the question: “What is your main reason for being in Brighton today?”

![Figure 23: Visitor responses to the question “What is your main reason for being in Brighton today?” on the audio guide handset](image)

Using the methodology developed above the following results were obtained for the impact of the Royal Pavilion on Brighton and Hove.

• 4% of the visitors questioned in the Brighton Survey came to the town primarily to see the Pavilion. They were ‘very much’ influenced in coming to Brighton by their wish to see the Royal Pavilion.
• 5.5% of the visitors questioned using the audio guide handset questionnaire came to the town primarily to see the Pavilion.

The close correlation between the figures from these two data sources gives an indication that they are not off the mark. If the mean of these two values is taken to reduce any biases in the collection methods then the figure for visitors coming to the city primarily to see the Pavilion is 4.75%.

• Brighton and Hove had an estimated tourist expenditure of £430 million in 2006 (data from Brighton and Hove Council). Therefore, 4.75% of the £430 million tourist economy was influenced by the wish to see the Pavilion. This represents a £20,425,000 direct contribution to the tourist economy.

• If we include those respondents from the Brighton Survey whose visit was ‘much’ (9%) influenced by the wish to see the Pavilion the proportion is an additional £38,700,000. Obviously, only a fraction of this larger amount can be attributable to the role of the Royal Pavilion.

These are ‘yardstick’ measures that provide an indication of the influence that a particular attraction has on the tourist economy. The reason these kinds of measures are important is that they provide heritage site managers with basic information about the kind of economic contribution that their sites make on the local economy. In view of the resource shortage at heritage sites (both financial resources and skills in the fields of economics), such methods allow managers to conduct basic economic analysis in-house without diverting considerable staff resources, or having to bring in expensive external resources.

9.8 Conclusion

The measurement tool developed allows heritage site managers to obtain a monetised approximation of the value that their site has on the local economy. It is apparent that ICT can deliver the entire dataset required for the calculation. The Royal Pavilion audio guide handset questionnaire has provided just such a dataset.

As an approximate guide the Royal Pavilion web site makes an annual contribution of one million pounds to the Brighton tourist economy. The running costs of the Pavilion are therefore clearly covered by its economic and financial impact on the local economy.

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10 Economic methods for valuing European cultural heritage sites (1994-2006)

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The following review looks at non-market valuation studies of cultural heritage sites that have been conducted in Europe. The most widely used non-market valuation technique in the cultural heritage sector is contingent valuation. This ‘stated preference’ methodology has been widely used in the field of environmental economics since the 1960s, but the adoption of the technique in the cultural heritage field has been much more recent. Revealed preference techniques have been used far less as a means to value heritage sites but there is evidence that this is beginning to change with increased use of the Travel Cost Method at heritage sites.

10.1 Introduction

When assessing the heritage sector, it is clear that a wide range of values can be attributed to cultural heritage sites. These can be precise values, such as the cost of admission to a site, or the cost of a book in the gift shop. These sorts of values are easily accessible to traditional economic modelling techniques. There is also a class of more amorphous values (non-market or non-monetary values), such as the ‘satisfaction’ derived from visiting a cultural heritage site, or the aesthetic value of a cultural heritage site to a local community.

It is therefore possible to apply two types of economic valuation analysis to cultural heritage sites – market and non-market. Market analyses are the traditional analyses carried out by economists which identify direct and indirect expenditure effects. While these techniques can determine the more easily measurable economic impacts of a cultural heritage site, they do not reveal the full range of values produced by a site. Non-market analyses try to capture the values and benefits that are not picked up by the market valuations.

Because cultural heritage goods and services are not usually traded in conventional markets, the benefits derived from these goods and services are ‘external’ to the market. The economic valuation of non-market cultural heritage goods and services attempts to ‘measure’ individual’s preferences for non-market goods and services. If monetary estimates are made of an individual’s preferences for such goods and services, these can be integrated into an economic format comparable to conventional economic costs and benefits. This will enable impacts generated in the sector to be accounted for in policy and decision making processes.

Non-market valuations can be separated into two techniques: revealed and stated preference.

- Revealed preference techniques are based on an individual’s actual purchasing decisions.
- Stated preference techniques are based on how people say they would react to changes in the market.

10.2 Revealed preference methods

The revealed preference methods of non-market valuation comprise of two principal techniques. Travel cost analysis and the hedonic price analysis. These non-market valuation techniques have seen fewer applications in the field of cultural heritage compared to stated preference methodologies, despite having much more widely-used economic principles.

10.2.1 Travel Cost Analysis

The underlying assumption of the travel cost methodology is that the amount individuals are prepared to pay to travel to a cultural heritage site is a reflection of the value of the goods and services provided by that heritage site. Using this framework, the expenses that individuals
incurred in order to visit a site, in terms of time and travel costs, are a proxy for the ‘price’ of access to the site. This data can be used to estimate willingness to pay.

Because travel costs increase with distance, the further away people live from a site, the less often they will visit. The number of visits to a site can be affected by other factors. The greater the choice of alternative sites, the fewer visits will be made to a site. Higher income earners will on average make more trips. Personal interest will also impact on the number of visitors. Statistical modelling should try to take these factors into account.

Travel cost methodology determines the number of visits from different distances from the site, and the travel cost from each zone. This is used to create an aggregate demand curve for visits to the site. The demand curve is used to determine how many visits individuals would make at various travel cost prices. This can then be used to provide an estimate of willingness to pay for site visitors. This applies if they are charged an admission fee or not. The most controversial aspects of the travel cost method include accounting for the opportunity cost of travel time, how to handle multi-purpose and multi-destination trips.

As with the hedonic price methodology, travel cost has not been widely applied to the valuation of cultural heritage sites. European studies using travel cost methods are rare. The only exception is the work of Bedate et al. (2004), which uses the travel cost method to estimate the demand curve for a historic village, a museum in the provincial capital, and a historic cathedral in the Castilla y León region of Spain. Travel cost is more widely used in North America (i.e. Martin 1994, Poor and Smith 2004), where the technique originated, although a recent study from Armenia (Alberini and Longo 2006) suggests the application of the method is becoming more widespread.

**Castilla y León**

The study by Bedate et al. (2004) uses a zonal travel cost model to estimate the demand curve for a historic village (Uruena), a museum in the provincial capital (Museum of Burgos), and a historic cathedral (Cathedral of Palencia) in the Castilla y León region in northern Spain.

A zonal travel cost model was constructed, with zones based upon bordering regions, regions not bordering in central Spain, peripheral regions in Spain, and regions outside of the Iberian peninsula. Surveys conducted mainly in the summer of 1998 were face-to-face interviews with tourists.

The research attempted to provide an estimate of the consumer surplus (use value) obtained from visits to the heritage sites. The study used transport costs (entry charges were considered to be zero), but not other expenses incurred during the journey. Using this data visits per capita were extrapolated for each zone, allowing the creation of a demand curve.

The walled town of Uruena revealed a total consumer surplus of €272.26 based on 130 valid responses, the Cathedral of Palencia had a total consumer surplus of €712.20 (based on 190 valid responses) and the total consumer surplus for the Museum of Burgos was €1171.97 (based on 294 responses). The researchers note that the longer the distance travelled the lower the number of visits. In the cases where this was not true the state of the road and transport network provides a credible explanation for the results.

**10.2.2 Hedonic Price Method**

The hedonic price method continues to be the most underused of the non-market valuation methodologies in the European context. As with the Travel Cost Method this is a revealed preference methodology, but this technique uses the increase, or decrease, in property values of buildings around a heritage site as the surrogate value. Hedonic pricing has been used even less frequently as an evaluation technique (Clark and Herrin 1997, Deodhar 2004).

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22 A cultural music festival was also valued.
The hedonic pricing method has been used in the field of environmental economics to provide an estimate of the value of environmental amenities and urban goods that affect prices of marketed goods. Hedonic price analysis was first used by Andrew Court in 1939, although the technique gained widespread popularity with the work of Zvi Griliches in the early 1960s (Goodman 1998). Although the technique is not widely used to determine values for cultural heritage sites, it has been applied to cultural heritage in both the United States and Australia. Simpler analyses confirm that there is a premium on heritage properties (see Figure 24).

House prices are the most common vehicle for estimating the value of environmental amenities, although other vehicles such as wages can be used (e.g. Smith 1983). Hedonic valuations assume that individuals place a value on the characteristics of a good, rather than the good itself. In this way the price will be a surrogate for the value of a set of characteristics, including cultural heritage characteristics that people consider important when purchasing the good.

The rationale of hedonic property price analysis is that property prices are determined not only by the characteristics of the property, but by the environmental attributes of the locality such as the neighbourhood and community, and other local environmental characteristics. In this scenario, if the factors not related to cultural heritage are controlled for, then the remaining price differences can be ascribed to differences in the quality and value cultural heritage. The higher price will be a reflection of the perceived value of cultural heritage to people who buy houses in the area.

![Figure 24: The premium for heritage properties (English Heritage 2003: 41)](image)

### 10.3 Stated preference methods

There are a number of issues with the application of revealed preference methodologies to heritage assets (Bennett 2000):

- Revealed preference techniques are retrospective. They rely on future changes being extensions of the past and therefore do not work well if the future scenarios are significantly different to the past.

- Marketed goods may not always neatly relate to cultural heritage (i.e. existence benefits). It is unlikely that these benefits will be adequately determined using revealed preference techniques.

These kinds of limitations have led to the development of stated preference techniques. These methodologies can be applied to a wide range of circumstances where no marketed goods exist. However, the techniques and methodologies for measurement are not equally well
developed in the different areas. Traditional economic analysis has a long history, but the measurement of indirect user benefits and societal benefits are less well developed.

Stated preference methodologies comprise two principal types of technique: contingent valuation and the contingent choice family of techniques. Contingent valuation is by far the most commonly used method for site evaluation.

**10.3.1 Contingent valuation**

The contingent valuation method (CVM) is a non-market valuation technique based on stated preference, which tries to extract an estimation of the ‘willingness to pay’ for a good or service from users and non-users. Contingent valuation is the only accepted way of determining a financial value for non-use values in cultural heritage. These ‘passive use’ values that do not involve a market and may not even involve direct participation are extremely difficult to quantify otherwise. They include amongst others option, existence, and bequest benefits. In the current climate of diminishing funds for the cultural heritage sector, there is increasing urgency in assigning a financial value to non-use and passive use at cultural heritage sites. Individuals are obviously willing to pay for non-use, or passive use, but traditional economic analyses tend to treat these benefits as zero. Since people do not reveal their willingness to pay for them through their purchases or by their behaviour, the only option for estimating a value is by asking them questions.

The contingent valuation method was first proposed in 1947 and applied in a Harvard Ph.D. dissertation on the economic value of recreation in woodlands in Maine. Numerous applications of the method to various public goods and studies of its methodological properties were conducted in the 1970s and 1980s. These studies are mainly from the environmental arena but also cover the fields of transport, health, education, and the arts, and have been conducted across the globe.

The contingent valuation method requires respondents to provide values based on hypothetical scenarios. Contingent valuations’ reliance on what respondents say they will do, rather than their actions, is paradoxically one of the method’s greatest attributes, and its most controversial feature.

As Noonan (2003: 172) states, the non-market nature of many cultural resources makes the use of methods like contingent valuation a “regrettable necessity”. Although the method has many advantages and disadvantages it does hold “the promise of improving our knowledge of cultural resources’ role in society.”

![Figure 25: The publication of stated preference surveys conducted on cultural heritage sites in Europe (1994-2006)](image-url)

The earliest application of non-market analysis in the ‘cultural’ field was the contingent valuation study undertaken in Australia to determine the value of support for the Australian arts, using increased taxes as a payment vehicle. The success of this early study was an impetus to the use of contingent valuation techniques in the cultural arena. The technique was
used increasingly for other cultural valuation studies throughout the 1980s, including a referendum on a Swiss municipal theatre, the value of performing arts and culture in Ontario, cultural attractions in Britain, and the purchase of two Picasso paintings by a Swiss city (Noonan 2002).

However, it was not until the early 1990s that non-market analyses began to be applied to cultural heritage sites (see Figure 25). The earliest published study was a contingent valuation survey undertaken at Nidaros Cathedral, Norway (Navrud 1992, and Navrud and Strand 2002). This was followed by a blossoming of site valuations in 1994, including a valuation of the damage caused by air pollution at Durham Cathedral, UK (Willis 1994), the value of maintaining 16 historic buildings in Neuchatel, Switzerland (Grosclaude and Soguel 1994), and a valuation of three historic sites in Italy.

1996 saw studies of the renovation of buildings in Grainger Town, Newcastle, UK (Garrod et al. 1996), and the WTP to gain entry to Warkworth Castle, UK (Powe and Willis 1996). It also saw the first publication of what was to become an extensive and sophisticated series of reports on the Royal Theatre in Copenhagen (1996).

The first valuation of an archaeological site was conducted in 1997, with the study of the archaeological complex at Campi Flegrei in Naples, Italy (Riganti 1997). The nineties closed with an evaluation of alternative road options for Stonehenge, UK (Mourato and Maddison 1999, Maddison and Mourato 2002).

Recently, contingent valuation has been used to determine WTP values for cleaning Lincoln Cathedral, UK (Pollicino and Maddison 2001), and retaining cultural services at various Italian museums (Bravi et al. 2002). The value of Italian heritage assets was assessed at Napoli Musei Aperti, Naples, Italy (Santagata and Signorello 2000, 2002), the baroque city of Noto, the Bosco di Capodimonte, and museum services in the Galleria Borghese museum, in Rome. Museums and archives have also been intensively studied, including the Surrey History Centre, UK (Özdemiroğlu and Mourato 2002), congestion at the British Museum (Maddison and Foster 2001), and the National Museum of sculpture in Valladolid, Spain (Sanz et al. 2003).

![Figure 26: The distribution of non-market valuation studies that have been conducted across the EU](image)

It is apparent that the application of non-market valuation studies of heritage sites is not evenly distributed across Europe. By far the greatest proportion of such studies has been

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23 This review refers to published studies only. A number of additional studies are contained in unpublished papers and Ph.D. dissertations.

24 The number of valuations in the graph relates to the number of published articles rather than the number of actual valuations of individual heritage sites.
conducted in the UK where the methods are officially recognised by the government, followed closely by Italy. With the exception of Denmark, Greece, and Finland, in the EU and Switzerland and Norway most European countries have not published non-market valuations for their heritage assets (see Figure 26). It is also clear that most types of cultural heritage assets have been valued using stated preference non-market valuation methods (see Table 2 and Table 3). These include:

**Cathedrals**

Some of the earliest applications of contingent valuation in the cultural heritage sector were carried out at cathedrals.

**Nidaros Cathedral (Norway)**

The first evaluation of a cultural heritage site using the contingent valuation method took place at Nidaros Cathedral, Trondheim, Norway (Navrud 1992, and Navrud and Strand 2002). Nidaros Cathedral is the oldest surviving medieval building in Scandinavia, which is built over the grave of St. Olav, the patron saint of Norway, and holds the Norwegian crown jewels. Navrud (1992) used contingent valuation to estimate visitor’s WTP values for reducing the deterioration of the building caused by air pollution. This was achieved using two different lines of questioning:

1. Individuals were asked exactly how much they would be willing to pay to reduce air pollution. As this was the cause of the degradation of the cathedral this method would solve the issue at its root. Individuals were also asked how much they would be willing to pay to restore the damage caused by air pollution to the cathedral.

2. Face-to-face interviews were conducted with individuals outside the cathedral between June and August 1991. An open-ended question format was used, and the payment vehicle was a one-off payment.

It was found that respondent’s willingness to pay for the reduction of air pollution required to preserve the cathedral was 318 NOK, but the WTP for the repair of pollution damage to the cathedral was 278 NOK. It was noted that 65% of the respondents felt that the original structure of the cathedral had a greater meaning to them than a restored structure.

In order to test for whole-part bias, the study compared the WTP for reducing damage to all Norwegian cultural heritage sites with the willingness to pay for reduced damages to Nidaros Cathedral.

Using the cathedral’s 165,000 visitors in 1991 as a base, the aggregated benefits of these results were calculated. Applying the mean WTP values provided estimations for visitors of 52.5 million NOK for preservation and 48.9 million NOK for restoration and repair. Approximately, 41,000 foreigners visited the cathedral in 1991, providing an average WTP attributed to foreigners of 238 NOK and 174 NOK respectively. The value of preserving and restoring the cathedral was 10 million and 7 million NOK (Navrud and Strand 2002: 38-9).

It has been suggested by Pollicino and Maddison (1999: 4) that because the study samples only the views of the cathedral’s visitors rather than all Norwegians, it represents an underestimate of the willingness to pay. They also note it is unclear if the respondents were valuing other benefits deriving from the reduction of air pollution in addition to the decrease in damage to the Cathedral.

**Durham Cathedral (UK)**

This study by Willis (1994) was used to determine WTP for access to Durham Cathedral in the UK. The survey was undertaken to ascertain if visitors could be charged an entrance fee in order to obtain revenue for building restoration. The analysis was used to determine what the change in visitor numbers would be at different price levels. The survey was also used to find out about visitor motivations (for example, 71% of those surveyed were engaged in
sightseeing). At the time of the survey, Durham Cathedral had free access, although donation boxes with a picture of a one pound coin were located near all entrances and exits. Ninety-two visitors were questioned when leaving the cathedral. The individuals were asked if they had already given a donation voluntarily. It was found that 51% of respondents had made no contribution, and only 12% had contributed more than the suggested amount of a pound.

A payment-card format was used to determine the WTP for access to the cathedral. When asked for a maximum WTP, 31% suggested that they would give more than the suggested donation. Furthermore, 49% said that they were willing to pay over £0.76. The optimum access fee calculated by Willis was £0.875. It was therefore evident that the maximum annual revenue that could be achieved from entrance fees was slightly lower that the revenue then obtained from annual donations. The reason that an entry charge would not raise significantly more than the donations was because many of the visitors who contributed less than the entrance charge would either cease to visit or visit less frequently. It should be noted that in this context, the benefit most visitors to the cathedral gain exceeds the revenue from donations. Therefore, a consumer surplus accrues to most visitors.

Lincoln Cathedral (UK)

This contingent valuation study by Pollicino and Maddison (2001, 2002) was used to determine a WTP valuation for a masonry cleaning program at Lincoln Cathedral. Air pollution had caused much soiling on the cathedral’s stonework. The mechanism used was a hypothetical increase in the cleaning cycle from forty years to ten years, and the payment vehicle was a rise in annual household tax. Face-to-face interviews were conducted with 328 Lincolnshire residents. The survey instrument was designed to comply with the NOAA recommendations for contingent valuation design and use.

Photographs were presented to respondents to show the cathedral as it could look with 15 years of accumulated grime and pollution on the façade, and after the stonework had been cleaned. Respondents were therefore valuing the change of appearance that followed the cleaning cycle.

A double-bounded, dichotomous-choice method was used and found evidence of a starting point bias. The research concluded that respondents living in the region of Lincoln did place a high value on the preservation of the cathedral’s appearance and supported a higher WTP for the increased cleaning cycle. Households in Lincoln had a mean WTP of £49.77 and an aggregate WTP of £1.8 million. Households outside of the city had a mean WTP of £26.77 and an aggregate of £5.5 million. The geographical extent of the WTP was estimated to extend to 40-53 miles from the cathedral.

Historic areas and buildings

Historic buildings, groups of buildings and localities have been widely studied using the contingent valuation technique.

Historic buildings in Neuchatel (Switzerland)

This research by Grosclaude and Soguel (1994) attempts to determine the WTP for restoration of damage, caused by traffic pollution, to historic buildings in Neuchatel, Switzerland. Sixteen buildings were included in the survey. Two hundred residents were surveyed. Those interviewed were told that the local authority could no longer afford to undertake all the restoration and maintenance required and so the residents would be required to contribute to a fund for the maintenance work. Each was shown photographs of the sixteen buildings in order to ascertain which buildings respondents wanted restored. The survey used an open-ended question format to determine residents WTP an annual sum to maintain the buildings. A number of individuals could not provide a precise WTP and so iterative bidding was instigated by the interviewer. A multiple regression analysis using a Box-Cox transformation was used to identify the variables that affected individuals’ willingness to pay. The mean WTP for the
sample was 14.3 Swiss Francs and the median WTP was 5.0 Swiss Francs. Twenty-two individuals were unconcerned about the protection of the buildings. If these individuals were removed from the analysis the values for mean and median WTP increase to 16.0 and 7.5.

The authors estimated annual WTP for six buildings was 108 Swiss francs per household. The external aggregated cost for the whole town was SFr. 1.5 million or SFr. 250,000 per building.

Grainger Town, Newcastle (UK)

This study by Garrod et al. (1996) determined whether a sample of 202 taxpayers in Newcastle were willing to pay increased taxes for the restoration of historic buildings in Newcastle’s Grainger Town. Those interviewed were presented with an open-ended WTP question. The study found a median WTP of £10.00. The bid values were seen as a function of use, demographic, and other variables. Respondents were also asked to allocate financial resources to different areas of Grainger Town. It was found that precedence was given to parts of Grainger Town that had the highest levels of dereliction (Garrod and Willis 2002).

Napoli Musei Aperti (Italy)

This contingent valuation survey by Santagata and Signorello (2000, 2002) was used to determine WTP values for a group of historic and cultural monuments, the Napoli Musei Aperti (NMA), in central Naples. 468 residents of Naples were questioned for the survey. Individuals were asked if they would contribute voluntarily to a non-profit organisation running the NMA heritage sites rather than relying solely on government support.

The survey was also used to obtain an estimate of individuals’ annual expenditure on cultural goods and services. Respondents were reminded of this figure before being asked a dichotomous-choice WTP bid. An open-ended question was then asked in order to elicit WTP. This form of questioning identified an anchoring bias.

The study estimated mean WTP values of 17,000 lire derived from the open-ended questions and 30000 lire from and dichotomous-choice questions. The average user WTP was 24,000 lire, compared to 8,000 lire for non-users. This was despite the city spending only 4800 lire per capita on the NMA. Various funding mechanisms were considered in light of these results.

Warkworth Castle (UK)

This study by Powe and Willis (1996) was used to determine visitor’s WTP to enter Warkworth Castle, Northumbria. In this research 201 individuals were surveyed on leaving the castle. At the time of the survey the entrance fee for adults was £1.80, pensioners £1.35 and members of English Heritage gained free admission. The mean WTP for all visitors was £2.53, and the median £2.34. Of the sample groups, paying visitors had a WTP of £2.62, pensioners £2.55, and surprisingly English Heritage members £2.30.

When questioned further, over 90% of the respondents stated that they expected that some percentage of their entrance fee was used for preservation of the castle. In these circumstances, the visitor’s mean WTP for entrance if the fee was not to be used for preservation of the site dropped to £1.62 and the median WTP to £1.50. The visitors were asked for their WTP if the funds were used exclusively for preservation of the fabric of the castle, assuming that they had already paid their stated WTP for entrance to the castle. The mean WTP for preservation was £0.50. It was concluded that visitors to Warkworth Castle have a mean WTP for preservation of £1.41 and a median of £1.84 (Garrod and Willis 2002). The total benefits provided to visitors at Warkworth Castle were estimated to be more than 2.5 times the revenue gained from the entry fees. The authors suggest that if “funding for heritage sites were to be purely determined by financial revenue, generated from entrance charges, then this would lead to less preservation of heritage than would be optimal or best for society.” (Op cit: 274)
The historic town centre of Noto (Italy)

This study by Signorello and Cuccia (2002) considers the preservation of the historic centre of the town of Noto in southern Sicily. Before being superseded by Syracuse in 1817 Noto was a provincial capital. This historic town centre is built in the Baroque style after a devastating earthquake in 1693. Noto in conjunction with seven other towns in the region comprise a UNESCO World Heritage Site.

The authors used a contingent valuation survey using both double-bounded dichotomous choice and open-ended question formats. The questionnaire was applied using face-to-face interviews with tourists. The scenario used was the respondents’ WTP for a potential entrance fee for tourists to the historic quarter of Noto. The fee would be devoted to the conservation and maintenance of the historic buildings.

The authors identified protest bids using a question which asked for reasons for a zero response to the open-ended willingness to pay question. It was found that protest bids accounted for 16% of the sample. The principal reasons for protest bids were that some though an entry fee to the historic centre was unfair, and some considered that the Local Authority should pay.

Mean WTP for all the tourists sampled was 11,500 ITL. A demand curve was constructed from the WTP data and a revenue maximising entrance fee was estimated to be 10,000 ITL. Both Italian and foreign tourists provided the same mean WTP which indicates that the respondents were valuing the access to the good rather than any non-use value connected with the maintenance or restoration work, which would be expected to be higher amongst Italians.

The Bosco di Capodimonte (Italy)

This study by Willis (2002) considers the Bosco di Capodimonte north of Naples in Italy. The research attempted to establish a revenue maximising entry fee for admission to the Bosco park, which at the time of study had free entry. However, the maintenance and conservation costs of the park led the managing body to consider options for charging an entry fee.

The Bosco park comprises 143 hectares of woodland bordering the Capodimonte Palace and gardens. These were built in the mid-eighteenth century as a royal hunting ground by Charles III, King of Naples. The Bosco contains a number of historic buildings, including the Royal China factory which made Capodimonte porcelain, the Royal Shooting Lodge, the Royal Stables, the Hermitage, and the church of St. Gennaro. The parkland consists of three principal types, formal avenues of trees, irregular areas with trees separated by open space, and 10 hectares of lawns with an eighteenth century irrigation system. Willis notes that the Bosco is both a cultural good (a park with both historical buildings and landscapes) and an environmental good. The park can be used as an environmental good independently of its cultural heritage nature.

A contingent valuation survey (based on iterative bidding) was conducted during the summer of 1999, during which time 494 questionnaires were completed. The respondents were presented with one of three iterative bidding cards with prices which ranged from 1,500-4,000 lira on Card 1, 2,000-8,000 lira on Card 2, and 4,000-16,000 lira on Card 3. The iterative bidding question format permits a demand curve to be created using the bid amount and the proportion of respondents willing to accept that bid amount. This would be the basis for establishing the revenue maximising entry price.

A demand curve was estimated from the sample data from which a mean revenue maximising price of 5,131 lira per visit was estimated. If everyone were to pay this amount for entry the gross revenue would be 534.8 million lira per annum. However, the number of visits would decrease from 283,313 to 104,225 per annum.
Archaeological sites

Archaeological sites have been poorly represented in non-market valuations in the cultural heritage sector. Two principal studies have been undertaken:

Stonehenge (UK)

Stonehenge is managed by English Heritage and is a UNESCO World Heritage Site. Constructed during the Neolithic and Bronze Ages (between 5,000 and 3,500 years ago) Stonehenge is a circular henge monument (bank and ditch) containing the stone circle. It is located in a well-preserved remnant prehistoric landscape containing 450 archaeological sites, mainly burial mounds, on Salisbury Plain, Wiltshire. However, two roads (the A303 and A344) pass very close to Stonehenge, causing noise pollution to the visitors, and breaking up access to the prehistoric landscape complex.

This survey by Maddison and Mourato (2002, and Mourato and Maddison 1999, Maddison and Mourato 2001) was used to determine if UK residents preferred the current road layout near Stonehenge or a tunnel option that would route the roads out of site from the monument.

In total 129 UK visitors to the site and 228 UK households were surveyed to determine WTP values for the alternative road options. Those surveyed were shown photographs of the current road and a representation of what the new tunnel would look like. After the respondent stated a preference regarding the alternatives they were asked for a WTP value using a payment ladder format for a two-year tax increase to support their road preference.

The mean WTP per household for the tunnel option was £12.80 and £4.80 for retaining the current road layout (giving rise to an aggregate value of £265 million for the tunnel and £116 million for the current road). There was a fairly even split between respondents on which option they would prefer (144 preferred a tunnel and 126 wanted to retain the current road layout). Using the median WTP approach, the authors found the aggregate benefit of the tunnel to be essentially zero. Despite this result the UK government is planning to build a 2km tunnel to route traffic past the Stonehenge environs.

Campi Flegrei archaeological park (Italy)

This study by Riganti (1997) and later Riganti and Willis (2002) looks at the Campi Flegrei Archaeological Park in the city of Naples. The archaeological park is on the site of the first-century-AD summer residence of the Roman emperors, and contains extensive examples of Imperial Roman remains. The authors attempted to determine the maximum monthly amount that individuals were willing to pay to preserve the heritage site. The payment vehicle chosen was a monthly payment to an independent conservation body.

Two sets of interviews were conducted. 448 interviews were conducted in March 1995 with visitors to the site and residents of Naples (Riganti 1997), while a second survey was conducted in July 1997 which collected 497 interviews. In 1997, a double-bounded question survey format was used to retest the single-bounded format used in the 1995 survey. The samples were split into two equally-sized groups, where one group was given more background information.

The survey elicited five different WTP responses for the following scenarios: conserving the entire area of Campi Flegrei allowing the restrictions on urban development to continue; conservation of parts of Campi Flegrei that were not yet publicly available; conserving Campi Flegrei for use by future generations, conserving the Bagnoli area only; and conserving the Bagnoli area for use by future generations.

The aim of the papers is to study the methodological issues associated with nested values associated with respondents’ total value for conserving the area. When different tests were used to test the internal consistency, the results suggested that the respondents did not recognize the different scopes involved with the scenarios, but greater information did help
them understand the goods being studied. The average WTP per household was 420,000 lira per annum.

**Theatres**

Theatres have been widely studied using non-market valuations in the cultural sector. A few such sites can be considered historical entities such as the Royal Theatre, Copenhagen founded in 1748.

**The Royal Theatre (Denmark)**

A number of sophisticated econometric contingent valuation reports have been produced by Bille (1996, 1997, 2002) regarding the aggregate WTP for the Royal Theatre, Copenhagen. 1,843 Danes were surveyed by telephone about their willingness to pay for the Royal Theatre in Copenhagen using tax as the payment vehicle. An open-ended WTP question was used in conjunction with a “too much, too little” question about government financial support for the Royal Theatre. Furthermore, in order to study the effect of information on WTP, a split sample was used to determine the effect on individual’s WTP of being told what a Dane actually pays on average in tax for the Royal Theatre each year. The WTP difference between users and non-users of the Royal Theatre was also studied; it was found that theatre users were willing to pay at least three times as much as non-users.

The survey found that there was a mean WTP of 154 Danish Kroners (DKK). The median WTP was DKK 60. The median was found to be equal to the per capita tax expenditure on the Royal Theatre, regardless of the information that the individuals received. However, it was found that the provision of information to individuals led to an anchoring bias (45% of WTP responses equalled DKK 60). A sophisticated model is forwarded to explain the WTP, taking into account the selection issues resulting from theatre visitation (Bille 2002: 219-28).

Bille concludes that the Royal Theatre would be unable to exist if visitor income alone had to pay for operating costs. More interestingly, non-user WTP is the largest part of the total WTP. In this way Bille argues that it is possible to economically justify the public grant received by the Royal Theatre using the taxpayer’s (non-user) WTP as the basis. Billie (1996) notes that “This valuation method is far preferable to economic impact studies, which have often been used as an argument for public support of cultural activities. The Danish taxpayers value the Royal Theatre and are willing to pay the price.”

**Museums**

Museums across Europe have been widely studied using non-market valuation techniques.

**The National Museum of Sculpture (Spain)**

This research by Sanz et al. (2003) used two different contingent valuation surveys to estimate the economic value of the National Museum of Sculpture in Valladolid, Spain. One survey was used to determine the direct use value of the museum and was presented to visitors to the museum; and the other was used to try to capture the passive use value and was presented to potential users in the town of Valladolid.

Both surveys made use of a double-bounded, dichotomous choice format for the valuation question, followed by an open-ended question. The payment vehicle was a contribution to a special fund for preservation and running of the museum. The contingent valuation survey for estimating use value was a self-completing survey, so that visitors themselves were the ones who filled it in when they decided to collaborate. 1,147 surveys were conducted, of which 1,108 were considered valid. The passive use value of the museum was estimated using a telephone survey of the people of Valladolid. 1,014 usable surveys were obtained.

The mean WTP of direct users of the museum ranged between €25 and €30 using a conservative scenario, and between €33 and €40 using a more optimistic scenario; the value
assigned by potential users of the museum (passive use values) was approximately €27 and €36 for each of these scenarios. It also showed that there was a degree of acceptance of the payment vehicle chosen. Importantly, it was found that when parametric, non-parametric and semi-parametric valuation methods were compared in a single study (using the double-bounded, dichotomous choice survey), there was no statistically-significant variation in the demand function for the analysed cultural good and its expected WTP, no matter what approach was used.

The Museum of Central Finland

This study by Tohmo (2004) aimed to determine the WTP for the Museum of Central Finland in Jyväskylä. The research also looked at the factors that could affect the residents’ willingness to pay for the museum. A contingent valuation questionnaire was sent by post to a random sample of 800 Jyväskylä residents aged 18 and over in November and December 1997.

The individual’s willingness to pay varied from zero to 1000 Finnish Markkas (FIM). The average WTP to retain the museum was FIM 103 (with a median of FIM 50). Almost 30% of the respondents provided a zero bid for their WTP for the Museum of Central Finland. It was hypothesised that this was a function of the fact that 46% of the respondents had never visited the Museum, and these non-users would tend to feel that they gained no benefit from the site. In fact, the author suggests that based on this percentage of non-users, the proportion of zero bids could have been expected to be even higher.

Unsurprisingly, the average WTP of non-users was only FIM 56 (median FIM 5). For non-users the average WTP was FIM 56. Although a large percentage of the respondents had not visited the museum very often, they did report some willingness to pay for its continued existence and for the possibility of making a future visit. The author argues that this non-use value of the museum can be used to further legitimize public support.

It was found that for each citizen (in 1996) FIM 78 in tax revenue was transferred to the Museum of Central Finland. It is apparent that the residents actually contribute less in taxes to the upkeep of the museum than they report that they are willing to pay to keep the Museum open (FIM 103). The residents’ willingness to pay is used to legitimise the upkeep of the museum, suggesting that at the very least the present amount of tax revenue can be directed towards the support of the museum.

Bolton Museum (UK)

Following the success of the contingent valuation of the British Library in 2003 (see below) Bolton Metropolitan Borough Council (BMBC) and the MLA (Museums, Libraries and Archive Council) commissioned a valuation of Bolton’s three museums, 15 libraries and central archive. At the time of the survey the museum, art gallery and aquarium had 249,179 visits per annum.

The survey used WTP and WTA questions to ascertain value. Face-to-face questionnaires were conducted in 2005 with Bolton residents providing 325 usable surveys. The WTP question elicited a monthly mean value of £2.77 for users and £1.14 for non users, this compares to £1.16 which is contributed in tax each month per council tax payer.

The WTA question was only asked to users of the museum and provided a valuation of £2,584,000. Interestingly WTA usually provides a higher value compared to WTP, the decision to exclude non-users gave a lower value than the WTP for the museum service. However, the WTA figures for the Libraries gave a total figure for Bolton of £6,431,000 compared to a WTP of 4,500,000 and the archive was valued at £889,000 compared to £250,000.

The cost of providing the museum service in Bolton was £1,800,000. The contingent valuation survey found that the total mean WTP value of users was £2,753,000 while with
non-users it was £1,713,000, providing a total value of £4,466,000. This resulted in a cost benefit ration of 2.48:1.

Overall the survey found that the cost of providing the museums, libraries and archives for Bolton was £6,550,000 while the total mean user value was £7,391,000 and the non-user value was £2,954,000. The total value placed on the services by users and non-users was therefore £10,345,000. The cost benefit ratio for all three services was therefore 1.6:1 (BMRC and MLA 2005).

Archives

Interest in archives has been a relatively recent phenomenon. The only non-market valuation that has been conducted is the pilot case study at the Surrey History Centre (UK).

Surrey History Centre (UK)

This research by Özdemiroğlu and Mourato (2001) studied the Surrey History Centre, a local authority archive in Woking, UK. The History Service collects and preserves archives and printed material of relevance to the history of Surrey, and makes them available for reference. The archives include county and government records, newspapers, magazines, journals, books, manuscripts, prints, drawings, letters, sound archives, oral histories, music collections, photographic collections, film, microfilm, maps, and collections in electronic format.

A pilot study of sixty interviews was conducted with ‘users’ and ‘non-users’ of the site in May 2000. Thirty-eight interviews were conducted with ‘users’ of the centre, and 22 interviews were conducted with ‘non-users’ who had never visited the centre in the local town of Woking. The intention was to determine if use and non-use values could be determined for the recorded heritage conserved at the Surrey History Centre. The authors stress that this was a pilot study with a correspondingly small sample size (60), and that a properly-conducted contingent valuation study would require between 500-1000 interviews rather than 60. As a consequence these values should not be considered as final results.

Two valuation scenarios were studied: the WTP to prevent the closure and dispersal of the collections and WTP to prevent the closure of the site to users but the retention of the collections. A payment ladder format was used to elicit WTP. In line with NOAA recommendations of best practice respondents were also reminded of their budget constraints. Respondents who were not willing to pay for the preservation scenarios were questioned as to their reasons.

It was found that no respondents felt that they did not benefit from the recorded heritage, while the majority indicated that they ‘strongly’ or ‘almost strongly’ benefit. The authors found that in order to prevent the closure of Surrey History Centre and the loss of its collection users were willing to pay on average £34 per annum, and in order to prevent the closure of access £24 per person per annum. On average ‘non users’ were willing to pay £13 per annum, for both scenarios (Özdemiroğlu and Mourato 2001: Table 11). The median of was approximately £20 for ‘users’ and £10 for ‘non-users’, because the median was lower than the mean, this was seen as indicating that the responses are skewed towards the lower end of the willingness to pay distribution.

The authors concluded that recorded heritage is a complex good that provides multiple benefits. People are willing to pay significant amounts to preserve the recorded heritage and access to recorded heritage assets (or the information contained within) is crucial. The preservation of recorded heritage assets for future generations (bequest value) seems to be the dominant benefit; the WTP for access (use value) exceeds willingness to pay for preservation (existence value).
Bolton central archive (UK)

A contingent valuation survey was conducted as part of the wider economic valuation of the Bolton museums, libraries and archives service commissioned by Bolton Metropolitan Borough Council (BMBC) and the MLA (see above). Bolton’s central archive had 9,293 visits per annum at the time of the survey. The cost of providing the Central archive service in Bolton was £250,000.

The contingent valuation survey found that the total mean WTP value of users was £204,000 while with non-users it was £76,000, providing a total value of £280,000. The cost benefit ratio of the service was therefore 1.12:1.

Overall the survey found that the cost of providing the museums, libraries and archives for Bolton was £6,550,000 while the total mean user value was £7,391,000 and the non-user value was £2,954,000. The total value placed on the services by users and non-users was therefore £10,345,000. The cost benefit ratio for all three services was therefore 1.6:1 (BMRC and MLA 2005).

Libraries

Although libraries technically fall outside of the definition of pure cultural heritage sites, some institutions can make a case for inclusion. One such example is the British Library, London, which contains books and manuscripts dating back to the ninth century.

The British Library (UK)

This study by Pung et al. (2004) uses contingent valuation to measure the economic impact of the British Library, London on the UK economy. The research was undertaken between August and October 2003. Three principal attributes of the library were valued. These were:

- The reading room services
- The document supply services and
- Public exhibitions.

Recent digital and Web initiatives were not evaluated so as not to bias the results, and non-UK library users were excluded from the survey.

In total 2,359 individuals were interviewed for the study including, 229 reading room users, 100 remote users, in addition to 2,030 members of the general public who did not make use of British Library services.

The authors found that the questions attempting to determine ‘willingness to pay’ gave lower value estimates compared to questions attempting to determine ‘willingness to accept’. This is a function of the fact that willingness to pay estimates are constrained by respondent’s disposable income.

For non-users general public a random sample of the population of all regions of the UK was conducted. 84% of respondents felt that the British Library had value for society as a whole. Individuals were willing to pay on average £6.30 in taxes, which is double the current average contribution of approximately £3.00. The willingness to pay was found to be strongly linked to income and region with the southeast having the highest WTP, although all regions were willing to pay more on average than they currently pay through taxes (Pung et al. 2004: 88).

Overall the study revealed that the British Library generates £363 million worth of value per annum, both in direct value to the library’s users (£59 million) and the indirect value to society (£304 million). This is 4.4 times the annual government funding of £83 million. This study is the first example of the use of contingent valuation to provide a figure for the total economic value of a major national research library.
10.3.2 Contingent choice

Contingent choice modelling was originally developed for marketing research and transport to measure preferences for different characteristics or attributes of a multi-attribute choice (Bateman et al. 2002). Choice modelling is similar to contingent valuation, in that it can be used to estimate both economic and non-use values for cultural heritage sites. Like contingent valuation, it is a hypothetical method, which requires individuals to make choices based on a hypothetical scenario. Unlike contingent valuation, it does not directly ask respondents to state their values in financial terms; rather the respondents are asked which scenario they prefer. Values are inferred from the hypothetical choices that the respondents make. Choice modelling comprises a family of techniques including choice experiments, contingent ranking, contingent rating and paired comparisons.

Contingent choice is particularly valuable for the evaluation of the outcomes of several policy options, where non-use values are important. Contingent choice can be used to rank options as well as estimate financial values.

The British Museum (UK)

This study by Maddison and Foster (2003) reports on work conducted to value the reduction of congestion at the British Museum. The British Museum in London is a heavily visited national attraction with 5.4 million visitors recorded in 1999. This level of visitation can affect the quality of the experience that is provided because of queuing, noise, and inability to view the exhibits. The research attempted to determine a value for the congestion costs imposed by visitors to the British Museum on other visitors. A number of potential solutions are forwarded to try to solve the issue of congestion. The possibility of charging was forwarded, and so was putting more artefacts on display. Interestingly, however, so was the use of an Internet-based virtual tour of the museum. The authors considered that this would not eliminate congestion, because a virtual tour would not provide the same levels of satisfaction as an actual visit to the site. There was also a concern that the cost of technology might outweigh the benefits of reduced congestion.

A choice experiment was conducted on 400 visitors to the museum in August 2000. The visitors were shown photographs of three exhibits at their most crowded, and photos of the same exhibits when less crowded. The survey implied that the crowded photos were associated with free admission, and the less-crowded photos with an admission charge (these were randomly chosen at £3, £6, £12, and £20). The respondents then indicated a preferred option.

The authors suggest that there is an estimated congestion cost of £5.99 imposed by the marginal visitor (i.e. the individual’s assessment of the congestion cost imposed by an additional visitor was estimated to be 0.04 pence, this was then multiplied by the number of visitors to obtain the aggregate congestion cost imposed by the marginal visitor on all other visitors). The marginal congestion cost does not, however, relate to the optimal charge, because if a charge were imposed, then the visitor numbers would fall and the congestion externality would change. The authors consider that the methodology used could be applied to other sites struggling with issues of mass visitation.

St. Anne’s Cathedral Square, Belfast (UK)

This study by Alberini, et al. (2003) focuses on St. Anne’s Cathedral Square, in Belfast Northern Ireland. The square in the Cathedral Quarter is located in one of the oldest areas of Belfast city. Much of the architecture dates to the nineteenth and early twentieth Century. The square is part of a conservation area and as such the height of buildings is not permitted to exceed six stories high.

The St Anne’s Square historic area is showing signs of deterioration because of long-term neglect and a lack of investment. A choice experiment was conducted in which respondents were asked to choose between pairs of regeneration projects for St. Anne’s Square or a
hypothetical square that was computer generated and designed to similar to St. Anne’s in all details except for the historical and cultural aspects.

Four attributes were chosen for analysis: the building height, the comparative amount of open space and built space, the relative retail and residential usage, and the cost of the regeneration project. There were in total 72 alternative regeneration options, of which respondents were presented with the choice of two alternatives, which were randomly selected.

The valuation survey design is noteworthy for its omission of a status quo option in the choice sets, where the existing state of the square may be chosen by the respondents. Methodologically the researchers considered that the status quo for the hypothetical square would be poorly defined, suggesting that in order for a comparison, St. Anne’s must also be treated similarly. Furthermore, the analysis was not designed to estimate willingness to pay, but to assess how the preferences of respondents are influenced by the architectural and land use attributes of public spaces. Face-to-face interviews with 254 respondents were conducted Belfast City centre in December 2001. A total of 244 usable responses were obtained.

The analysis suggested that respondents favoured regeneration projects for St. Anne’s that involved more open space. While in the hypothetical square, the proportion of open space is found not to be statistically significant. The respondents also favoured projects which preserved the current six storey height of buildings and increased the residential use of buildings. While in the hypothetical square, respondent’s higher proportions of residential buildings were favoured less. In the hypothetical square the higher the cost of a project, the less likely respondents were to choose them. In contrast in St. Anne’s Square the higher the cost of a regeneration project, the more likely it was to be favoured by respondents. The study found that the implicit marginal prices for the hypothetical square were as follows. A 50% increase in open space equated to £3.00, a single percent increase in retail space at expense of residential space equated to £0.40, and respondents WTP to avoid an increase in building height on the square was £7.20.

Galleria Borghese museum (Italy)

One of the first studies to measure the WTP associated with ICT (specifically multimedia services) at a cultural heritage site was conducted by Mazzanti (2003a, 2003b) at the Galleria Borghese museum, in Rome. The Galleria Borghese museum, located within the Villa Borghese Park in Rome, is considered by the author to be one of the most important of the state-owned cultural heritage sites in Italy. The site was refurbished between 1984 and 1997, and this research was the first major survey carried out since the restoration project.

The study was based on a survey carried out at the site in the summer of 2000, which collected 185 valid questionnaires (92% of the total conducted) after on-site interviews with visitors. The questionnaire was composed of three sections: the first looked at the subject of the study, the second contained a contingent valuation questionnaire, and the final was a choice experiment followed by a request for socio-economic information.

The survey actually valued a variety of elements, of which multimedia services was one. The author used a choice experiment in which the various attributes of the site were broken down so that visitors could provide willingness to pay for various hypothetical changes in the attributes. The two contingent valuation studies (using a payment ladder format) were carried out in order familiarise visitors with monetary valuation and to get information on (monetary) values attached to the current offerings for visit length and site conservation.

The various services offered by the Galleria Borghese museum were described to users including:

- The entry fee
- The level of conservation activity at the site.

The visitors were asked to make choices about:
• Increasing the level of conservation and restoration
• Increasing visit hours
• The addition of multimedia services
• The addition of multimedia services, plus a temporary exhibition.

It was found that visitors expressed a preference for an increase in spending on conservation, for an increase in the level of multimedia services and a possible temporary additional exhibition complementary to the main one. The visitors questioned were, on average, not prepared to pay for increasing the time of the average two hour visit.

Using the figures from 2000 for paying visitors and from WTP values, the author calculated the increase in economic surplus, which could be derived from a supply increase (i.e. and additional temporary exhibition and multimedia services and a conservation earmarked fund). The contingent valuation experiment revealed that the gross economic surplus, which could theoretically be captured by introducing new services and conservation funds, ranged between 21-121% of the direct revenue raised by fee charges, and between 15-88% of the total yearly economic surplus.

Knossos Palace and the Heraklion Archaeological Museum (Crete)

This study conducted by Apostolakis and Jaffry (2005) used choice modelling to value visitors’ preferences and their willingness to pay for hypothetical developments to Knossos Palace and the Heraklion Archaeological Museum in Crete. Six attributes were studied: advertising, congestion, promotion, eating and drinking facilities, and other attributes which included the “use of A/V material for the interpretation of the exhibits” as well as kindergarten facilities.

To study these, a choice experiment survey was conducted for each site. Three hundred self-administered questionnaires were distributed for each site. The questionnaires were distributed randomly in hotels across Crete. The survey targeted visitors as well as non-visitors to the two heritage attractions. In total 253 usable responses were obtained, giving a response rate for the Heraklion Archaeological Museum of 42.7%, whereas the response rate for the Knossos Palace was 41.7% (Apostolakis and Jaffry 2005: 312).

Analysis of the results revealed that three factors of the hypothetical developments had a strong influence on potential visitation rates – congestion, kindergarten facilities and A/V interpretation. At both attractions tourists with young children felt that the provision of kindergarten facilities increase the probability of visitation. A 50% deterioration in congestion levels in both sites would reduce of tourists’ satisfaction levels and lead to a potential reduction in visitation. Middle-aged tourists exhibited positive preferences for the provision of A/V interpretation at the Heraklion Archaeological Museum, but not Knossos Palace. As Apostolakis and Jaffry (2005: 315) note, “given that more than half of tourists in Crete (52%) fall in the 31-50 age category. This result suggests that the majority of tourists belonging in this age group who responded to the museum survey prefer the introduction of A/V material in the form of video and 3-dimensional representations of the museum and its exhibits.”

The researchers translated tourists’ preferences into monetary units using marginal willingness to pay estimates. From these it was found that tourists with children younger than 10 years old reported that they would be willing to pay €4 for the introduction of kindergarten facilities in the Knossos Palace and an extra € 4.7 at the Heraklion Archaeological Museum. At the Heraklion Archaeological Museum middle aged tourists were willing to pay €2.67 for the provision of better A/V interpretation facilities. These results make it clear that tourists are prepared to pay extra in order to find out more about heritage sites through better interpretation.
Application to valuing ICT at cultural heritage sites

It is becoming apparent that of the stated preference methodologies the contingent choice family of techniques could have a direct application to the study of ICT at cultural heritage sites. Contingent choice is being increasingly used for the study of cultural heritage assets including ICT at those sites. Although contingent choice has had less methodological study compared to contingent valuation it does seem to be a strong contender for the study of ICT.

10.4 Conclusions

The use of revealed preference non-market valuation techniques, such as the travel cost and hedonic pricing studies have had fewer applications in the field of cultural heritage, despite having widely-accepted economic principles. European studies using travel cost methods are rare. An exception is the work of Bedate et al. (2004), which uses the travel cost method to estimate the demand curve for a historic village, a museum in the provincial capital, and a historic cathedral in the Castilla y León region of Spain. Travel cost appears to be more widely used in North America (i.e. Martin 1994, Poor and Smith 2004). Hedonic pricing has been used even less frequently as an evaluation technique (Clark and Herrin 1997, Deodhar 2004).

The use of contingent valuation is now widely accepted as a non-market valuation technique in the cultural heritage sphere. The methodology is highly attractive because of its potential to capture both use and non-use values, and has been used across all domains of cultural heritage, from archaeological and historical sites to museums and archives. In contrast, because choice experiments are the most recent innovation in valuation techniques, they are still rare in their application to heritage sites. However, these techniques show the most promise for the evaluation of potential ICT installations at heritage sites.

Research by Maddison and Foster (2003) used a choice experiment at the British Museum (UK) to determine the WTP to reduce congestion in the museum. This was followed by a study conducted at the Galleria Borghese Museum (Italy), which combined a contingent valuation survey with a choice experiment. This was used to determine the WTP for entry to the Galleria, and the provision of additional (multimedia) services, and exhibitions (Mazzanti 2003a, 2003b). This is the first attempt to value ICT at cultural heritage sites.

At present we can conclude that the potential for benefit transfer (i.e. transfer of values derived from study sites to new policy cases) is limited because of the comparatively low number of evaluations, and their orientation towards both site- and project specific values which would not transfer well.

<table>
<thead>
<tr>
<th>Site</th>
<th>Study</th>
<th>Publications</th>
<th>Survey type</th>
<th>Survey date</th>
<th>Number surveyed</th>
<th>Breakdown</th>
<th>Survey method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nidaros Cathedral (Norway)</td>
<td>WTP for air pollution damage to Nidaros Cathedral</td>
<td>Navrud (1992), Navrud and Strand (2002).</td>
<td>Contingent valuation</td>
<td>June-August 1991</td>
<td>163</td>
<td>Individuals outside the cathedral</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>Durham Cathedral (UK)</td>
<td>WTP for entry to Durham Cathedral</td>
<td>Willis (1994)</td>
<td>Contingent valuation</td>
<td>1993</td>
<td>92</td>
<td>Cathedral visitors (users)</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>Royal Theatre, Copenhagen (Denmark)</td>
<td>WTP for current services at the Royal Theatre</td>
<td>Bille (1996, 1997, 2002)</td>
<td>Contingent valuation</td>
<td>Autumn 1993</td>
<td>1,843</td>
<td>Danish households (users and non-users)</td>
<td>Telephone and some face-to-face interview</td>
</tr>
<tr>
<td>Warkworth</td>
<td>WTP for entry to</td>
<td>Powe and Willis</td>
<td>Contingent</td>
<td>June-September</td>
<td>201</td>
<td>Potential site</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>Site</td>
<td>Study</td>
<td>Publications</td>
<td>Survey type</td>
<td>Survey date</td>
<td>Number surveyed</td>
<td>Breakdown</td>
<td>Survey method</td>
</tr>
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</tr>
<tr>
<td>Castle (UK)</td>
<td>Warkworth Castle</td>
<td>(1996)</td>
<td>valuation</td>
<td>1994</td>
<td>visitors</td>
<td>interview</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>Campi Flegrei (Italy)</td>
<td>WTP for the conservation of the archaeological park</td>
<td>Riganti (1997), Riganti and Willis (2002)</td>
<td>Contingent valuation</td>
<td>March 1995, July 1997</td>
<td>446 + 497</td>
<td>Site visitors (users) and Naples residents</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>Grainger Town, Newcastle (UK)</td>
<td>WTP for the restoration of buildings at Grainger Town, Newcastle</td>
<td>Garrod et al. (1996)</td>
<td>Contingent valuation</td>
<td>1995</td>
<td>202</td>
<td>Newcastle taxpayers</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>Campi Flegrei (Italy)</td>
<td>WTP for the conservation of the archaeological park</td>
<td>Riganti (1997), Riganti and Willis (2002)</td>
<td>Contingent valuation</td>
<td>March 1995, July 1997</td>
<td>446 + 497</td>
<td>Site visitors (users) and Naples residents</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>Napoli Musei Aperti (Italy)</td>
<td>WTP for the preservation of the Napoli Musei Aperti</td>
<td>Santagata and Signorello (2000, 2002)</td>
<td>Contingent valuation</td>
<td>Autumn 1997</td>
<td>468</td>
<td>Naples residents</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>Museum of Central Finland</td>
<td>WTP for current services at the museum</td>
<td>Tohomo (2004)</td>
<td>Contingent valuation</td>
<td>November-December 1997</td>
<td>800</td>
<td>Local residents (users and non-users)</td>
<td>Postal survey</td>
</tr>
<tr>
<td>Stonehenge (UK)</td>
<td>WTP for routing nearby roads through a tunnel or retaining the status quo</td>
<td>Maddison and Mourato (2002)</td>
<td>Contingent valuation</td>
<td>March 1998</td>
<td>357</td>
<td>129 on-site users 228 UK residents</td>
<td>Face-to-face interview</td>
</tr>
<tr>
<td>British Library (UK)</td>
<td>WTP for current services at the library</td>
<td>Pung et al. (2004)</td>
<td>Contingent valuation</td>
<td>August-October 2003</td>
<td>2,359</td>
<td>Reading room users and UK residents</td>
<td>Telephone (users), face-to-face (public)</td>
</tr>
<tr>
<td>Bolton Museums (UK)</td>
<td>WTP and WTA for the museum services</td>
<td>BMBC and MLA (2005)</td>
<td>Contingent valuation</td>
<td>Summer 2005</td>
<td>325</td>
<td>Bolton residents</td>
<td>Face-to-face (public)</td>
</tr>
</tbody>
</table>

Table 2: European non-market valuations conducted at cultural heritage sites
<table>
<thead>
<tr>
<th>Site</th>
<th>Study</th>
<th>Currency</th>
<th>Mean WTP (Euro equivalent)</th>
<th>WTP</th>
<th>Method</th>
<th>Payment vehicle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nidaros Cathedral</td>
<td>WTP for preventing or repairing air pollution damage to Nidaros Cathedral</td>
<td>Norwegian Kroners (NOK)</td>
<td>318 NOK (preservation), 278 NOK (restoration)</td>
<td>39.64 ECU (preservation), 34.66 ECU (restoration)</td>
<td>Individual</td>
<td>Open-ended question</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Tax, donation to fund</td>
</tr>
<tr>
<td>Durham Cathedral</td>
<td>WTP for entry to Durham Cathedral</td>
<td>Pounds Sterling (£)</td>
<td>0.77, 0.99 ECU</td>
<td>Individual</td>
<td>Open-ended question</td>
<td>Entry fee</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Royal Theatre,</td>
<td>WTP for current services at the Royal Theatre</td>
<td>Danish Kroners (DKK)</td>
<td>104 DKK</td>
<td>13.74 ECU</td>
<td>Individual</td>
<td>Open-ended question</td>
</tr>
<tr>
<td>Copenhagen (Denmark)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Tax</td>
</tr>
<tr>
<td>Neuchatel (Switzerland)</td>
<td>Damages caused by air pollution to 16 buildings in Neuchatel</td>
<td>Swiss Francs (SFr)</td>
<td>108 SFr for 6 buildings</td>
<td>59.55 ECU</td>
<td>Individual</td>
<td>Open-ended question</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Donation to fund</td>
</tr>
<tr>
<td>Warkworth Castle</td>
<td>WTP for entry to Warkworth Castle</td>
<td>Pounds Sterling (£)</td>
<td>£2.53, £1.41 ECU (entry)</td>
<td>Individual</td>
<td>Open-ended question</td>
<td>Entry fee</td>
</tr>
<tr>
<td>(UK)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grainger Town,</td>
<td>WTP for restoration of buildings at Grainger Town, Newcastle</td>
<td>Pounds Sterling (£)</td>
<td>£13.76, 16.80 ECU</td>
<td>Household</td>
<td>Open-ended question</td>
<td>Tax</td>
</tr>
<tr>
<td>Newcastle (UK)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campi Flegrei (Italy)</td>
<td>WTP for the conservation of the archaeological park</td>
<td>Italian Lire (L)</td>
<td>$28.81 (to conserve CF), $10.18 (conserving parts of CF not open to the public)</td>
<td>n.a.</td>
<td>Individual</td>
<td>Single bounded dichotomous choice + double bounded dichotomous choice</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Donation to fund</td>
</tr>
<tr>
<td>Napoli Musei Aperi (Italy)</td>
<td>WTP for the preservation of the Napoli Musei Aperi</td>
<td>Italian Lire (L)</td>
<td>17,000 ITL</td>
<td>8.84 ECU</td>
<td>Household</td>
<td>Single bounded dichotomous choice + open ended question</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Donation to fund</td>
</tr>
<tr>
<td>Museum of Central</td>
<td>WTP for current services at the museum</td>
<td>Finnish Markkas (FIM)</td>
<td>103 FIM</td>
<td>18.24 ECU</td>
<td>Individual</td>
<td>Tax</td>
</tr>
<tr>
<td>Finland</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stonehenge (UK)</td>
<td>WTP for routing nearby roads through a tunnel or retaining the status quo.</td>
<td>Pounds Sterling (£)</td>
<td>£12.80 for the tunnel, £4.80 for the current road</td>
<td>18.92 ECU for the tunnel, 7.10 ECU for the current road</td>
<td>Household</td>
<td>Payment card / conjoint analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Tax, entry fee for non-UK nationals</td>
</tr>
<tr>
<td>Lincoln Cathedral</td>
<td>WTP for cleaning air pollution damage to Lincoln Cathedral</td>
<td>Pounds Sterling (£)</td>
<td>£49.77 Lincoln residents, £26.77 Lincolnshire residents outside Lincoln</td>
<td>€ 73.58 Lincoln residents, € 59.57 Lincolnshire residents outside Lincoln</td>
<td>Household</td>
<td>Double-bounded dichotomous choice, Tax</td>
</tr>
</tbody>
</table>

The Euro equivalent exchange rate has been calculated using the average annual exchange rate (Interbank rate) for the year of the survey. The ECU rate has been used between 1991 and 1998, and the Euro rate from January 1, 1999 to the present.
<table>
<thead>
<tr>
<th>Site</th>
<th>Study</th>
<th>Currency</th>
<th>Mean WTP (Pounds Sterling (£))</th>
<th>Mean WTP (Euro equivalent)</th>
<th>WTP Method</th>
<th>Payment vehicle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surrey History Centre (UK)</td>
<td>WTP to prevent the closure of the Surrey History Centre</td>
<td>Pounds Sterling (£)</td>
<td>€34 for loss of collections (users) €24 for loss of access (users) €13 both scenarios (non-users)</td>
<td>€55.85 for loss of collections (users) €25.64 for loss of access (users) €21.35 both scenarios</td>
<td>Individual</td>
<td>Payment card, Tax</td>
</tr>
<tr>
<td>British Museum (UK)</td>
<td>WTP to reduce congestion in the museum</td>
<td>Pounds Sterling (£)</td>
<td>£5.99 congestion cost imposed by the marginal visitor</td>
<td>£9.84 congestion cost imposed by the marginal visitor</td>
<td>Individual</td>
<td>Conjoint analysis, Entrance fee</td>
</tr>
<tr>
<td>National Museum of Sculpture, Valladolid (Spain)</td>
<td>WTP for current services at the museum</td>
<td>Euros (€)</td>
<td>€25-40 (direct use) €27-36 (passive use)</td>
<td>€25-40 (direct use) €27-36 (passive use)</td>
<td>Individual</td>
<td>Double bounded dichotomous choice + open ended question, Donation to fund</td>
</tr>
<tr>
<td>Galleria Borghese Museum (Italy)</td>
<td>WTP for entry to the Galleria (CV), and additional services (CE)</td>
<td>Euros (€)</td>
<td>€1.47-4.03 (conservation) €0.46-0.75 (multimedia) €1.14-2.55 (multimedia + exhibition) Total €8.7</td>
<td>€1.47-4.03 (conservation) €0.46-0.75 (multimedia) €1.14-2.55 (multimedia + exhibition) Total €8.7</td>
<td>Individual</td>
<td>Payment ladder, choice experiment, Entry fee</td>
</tr>
<tr>
<td>British Library (UK)</td>
<td>WTP for current services at the library</td>
<td>Pounds Sterling (£)</td>
<td>£116 for reading room users £6.30 UK residents</td>
<td>£167.75 for reading room users £9.11 UK residents</td>
<td>Individual</td>
<td>Open-ended question, Donation</td>
</tr>
<tr>
<td>Bolton Museums (UK)</td>
<td>WTP and WTA for the museum services</td>
<td>Pounds Sterling (£)</td>
<td>£2.77 per user, £1.14 per non-user per month</td>
<td>£4.07 per user, £1.68 per non-user per month</td>
<td>Individual</td>
<td>Open-ended question, Donation to fund</td>
</tr>
</tbody>
</table>

Table 3: Values derived from European studies26

References


26 A tabular format is not the ideal mechanism for displaying the results of such non-market analyses. By necessity the data has to be simplified, it is strongly recommended that the original sources are consulted in all cases.

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Glossary

Adaptive re-use
The recycling of an older building, or structure, often for a new function. This can involve extensive restoration or rehabilitation of both the interior and exterior.

Altruistic value
In economics this is a non-use value where an individual is willing to pay a sum in order to enhance the wellbeing of others.

Anchoring bias
In the determination of WTP values anchoring bias is the process where the values respondent give are influenced by the starting values or succeeding values provided in the survey instrument.

Benefit transfer
A secondary economic analysis methodology that uses the results from previous valuation studies and applies those results, with or without modification, to the same or similar good in a different context.

Bequest value
In economics this is a non-use value in which individuals place a value on the preservation of a resource for others in the future.

Branding
A mechanism for creating a distinctive identity for a service or product allowing it to be distinguished from competing products and services.

Capital equipment
These are goods that an institution does not consume during everyday use and provide operating benefits over time (such as touch-screen displays, projectors and audio-visual equipment, etc.). This type of equipment is considered an asset or capital asset of the institution.

Capital expenditure
Financial expenditure on capital assets rather than on operating expenses. These expenditures will contribute to the property and equipment of an institution thereby enhancing its value.

CBA
See Council for British Archaeology.

Conservation
All the processes devoted to the preservation of cultural heritage for the future. Conservation activities include examination, documentation, treatment, and preventative care, supported by research and education.

Coercive payment vehicles
Payment vehicles in that involve some degree of compulsion, such as rates, taxes, or fees. This contrasts to non-coercive payment vehicles such as donations.

Cultural sector
The cultural sector comprises four elements: heritage, arts, cultural industries, and libraries and archives.

Cultural industries
These include the film and video industry, broadcasting, sound and music recording, book and periodical publishing, theatre, and new media (including multi- and interactive media).

**Consumer surplus**

The net difference between the actual cost of a good or service to a consumer and the price that they would be willing to pay for that same good or service. This is the net benefit an individual receives from the consumption of a particular commodity. For non-market goods, the willingness to pay is equivalent to the consumer surplus.

**Contingent choice**

A stated preference methodology similar to contingent valuation. Like contingent valuation it requires individuals to make rank choices based on a hypothetical scenario. Unlike contingent valuation it does not directly ask respondents to state their values in financial terms. These values are inferred from the hypothetical choices (or tradeoffs) that people make.

**Contingent valuation method**

A stated preference technique in which a hypothetical market is constructed and individuals are questioned as to how much they would be willing to pay to conserve the non-market benefits or their willingness to accept compensation for the loss of those goods. This preference can then be used to infer the value that individuals place on the non-market benefits in the scenario; this can then be used to estimate the value of these goods to society.

**COO**

Cost Of Ownership. See TCO.

**Cost-benefit analysis**

An economic valuation method that tries to assess all of the major economic impacts associated with an investment decision, including non-market impacts. The techniques can be used to determine if a project represents a net social benefit to society.

**Council for British Archaeology**

The Council for British Archaeology (CBA) is an educational charity that promotes knowledge, appreciation and care of the historic environment in the UK. The CBA is a key independent voice promoting conservation of the historic environment, is the principal non-governmental organisation for involving young people in archaeology and promoting voluntary involvement in archaeology across the British Isles, and it is strongly involved in providing digital and other information services for archaeology (www.britarch.ac.uk).

**Council of Europe**

Founded in 1949, the Council of Europe was set up to defend human rights, parliamentary democracy and the rule of law, in addition to standardising member countries’ social and legal practices, and the promotion of a European identity based on shared values.

**Cultural heritage**

Things and places associated with the heritage of human activity. This includes everything from monuments, buildings, relics, towns, landscapes, and movable items.

**Culture**

The distinctive spiritual, material, intellectual and emotional features that characterise a society or social group. This includes everything from the arts, to modes of life, value systems, traditions, and beliefs.
Cultural landscapes
These can include natural environments that have been exploited using a particular means of agricultural or pastoral activity. They can be aesthetically-pleasing areas such as gardens and parks, or apparently natural regions that have associated religious, artistic or cultural meanings.

CV
See Contingent valuation method.

CVM
See Contingent valuation method.

DCMS
See Department of Culture Media and Sport.

Department of Culture Media and Sport
The Department of Culture Media and Sport (DCMS) is responsible for the UK Government’s policy on the arts, sport, the National Lottery, tourism, libraries, museums and galleries, broadcasting, creative industries including film and the music industry, press freedom and regulation, licensing, gambling and the historic environment. The DCMS is also responsible for the listing of historic buildings and scheduling of ancient monuments, the export licensing of cultural goods, the management of the Government Art Collection and for the Royal Parks Agency (www.culture.gov.uk).

Direct use
The actual on-site use and consumption of the resources of a cultural heritage site.

Direct valuation method
Methodologies that use data collected through surveys to determine values.

Disposable income
The income individuals retain after they have paid their tax. Individuals can spend this money however they wish.

DOCOMOMO

Economic impact
In the context of cultural heritage these are changes in a defined economy that result from spending attributed to a cultural heritage site or event.

Economic value
The maximum amount an individual is willing to pay in order to retain a good or service, or the minimum that an individual is willing to accept as compensation to sell a good or service.

Educational value
A value that encompasses all the benefits the site offers in terms of learning.

Edutainment
A presentation that combines both education and entertainment. Interactive edutainment software for children is one of the leading uses of this genre. See infotainment.

English Heritage
Officially known as the Historic Buildings and Monuments Commission for England. Founded in 1984, English Heritage is an executive non-departmental public body sponsored by the Department for Culture, Media and Sport (DCMS). English Heritage has responsibility for all aspects of the protection and promotion of the historic environment (www.english-heritage.org.uk).

EVRI
Environmental Valuation Reference Inventory. Developed in Canada, EVRI is an international database of economic studies of environmental benefits and health impacts. It has been specially developed in order to allow policy analysts to use the benefits transfer technique as an alternative to doing original valuation research (www.evri.ca).

Existence value
A non-use value in which individuals place a value on the protection of the existence of the actual resource.

Free riding
In the context of group performance, where all the group members receive equal reward (such as access to a service or pay) and it is difficult to ascertain the actual contribution of individuals to the performance of the group, then it is rational for group members who can get away with it to let other individuals do most the work, or free ride.

FTE
Full Time Equivalent employees. Statistics for total employment often include part-time workers; these can be converted to FTEs in order to enable effective comparisons.

GDP
Gross Domestic Product. A measure of the total output produced in a given period. GDP is equivalent to total income and total expenditure.

Hedonic pricing method
A revealed preference methodology that uses a parallel market (usually the property market) to determine the value of non-market benefits. The technique is based on the hypothesis that the value of property is related to the non-market benefits in the locality.

Hedonic property value method
HPV is a specific application of the hedonic pricing method. Because property is the principal parallel market used in hedonic pricing studies the term is usually used synonymously with the hedonic pricing method.

Heritage Lottery Fund
The Heritage Lottery Fund (HLF) was set up by the UK’s Parliament in 1994 to give grants to a wide range of projects involving the local, regional and national heritage of the United Kingdom. The HLF distributes a share of the money raised by the ‘National Lottery’ to good causes. It is a ‘non-departmental public body’ that reports to Parliament through the Department for Culture, Media and Sport. Since 1994, the HLF has awarded over £3 billion to more than 15,000 projects across the UK (www.hlf.org.uk).

Historic Royal Palaces
The Historic Royal Palaces charitable trust was established in the UK in April 1998 as a Royal Charter Body with charitable status in order to manage the unoccupied royal palaces. There are five principal sites: the Tower of London, Hampton Court Palace, Kensington Palace, the Banqueting House, Whitehall and Kew Palace. The Historic Royal Palaces are an independent charity, which is not funded by the government or the Crown (www.hrp.org.uk).
HLF

See Heritage Lottery Fund.

IAIA

International Association for Impact Assessment. Founded in 1980 with the aim of bringing together practitioners, researchers, and users of various types of impact assessment worldwide (www.iaia.org).

ICA

International Council on Archives. Founded in Paris in 1948 the mission of the ICA is to promote the preservation and use of archives around the world. The ICA works for “the protection and enhancement of the memory of the world and to improve communication while respecting cultural diversity” (www.ica.org).

ICBS

International Committee of the Blue Shield. A joint initiative of the ICA, ICOM, ICOMOS, and the IFLA. Started in 1996 to provide authorities with expertise in the event of conflict affecting cultural heritage sites (www.ifla.org/blueshield.htm).

ICCROM

The International Centre for the Study of the Preservation and Restoration of Cultural Property. ICCROM is an intergovernmental organization, established in Rome in 1959 to improve the quality of conservation practice as well as raising awareness about the importance of preserving cultural heritage. The ICCROM acronym refers to the International Centre for Conservation in Rome (www.iccrom.org).

ICOM

International Council on Museums. Created in 1946, ICOM is an international organisation of museums and museum professionals which is committed to the conservation and communication to society of the world’s natural and cultural heritage. It is a non-governmental organisation maintaining formal relations with UNESCO and having a consultative status with the United Nations’ Economic and Social Council (www.icom.museum).

ICOMOS

International Council on Monuments and Sites. Founded in 1965, ICOMOS is an international, non-governmental organization dedicated to the conservation of the world’s historic monuments and sites. ICOMOS is UNESCO’s principal advisor in matters concerning the conservation and protection of monuments and sites (www.icomos.org).

IFLA

International Federation of Library Associations and Institutions. Founded in 1927, in Edinburgh, Scotland, the IFLA is the principal international body representing the interests of library and information services and their users (www.ifla.org).

IMLS

Institute of Museum and Library Services. Created in 1996 by the ‘Museum and Library Services Act’, the IMLS is an independent US federal agency that fosters leadership, innovation, and lifelong learning through support of the nation’s museums and libraries (www.imls.gov).

Indirect valuation methods

Methodologies that are based on the observation of behaviour in order to determine the willingness to pay for non-market goods or services.

Infotainment
The combination of information and entertainment in a single production. See *edutainment*.

**Intangible heritage**

The traditional forms of expression of many societies. These can include: languages, music and song, rites and beliefs, the performing arts, oral traditions, festive events, and even culinary traditions. Many of these are threatened by a trend towards cultural uniformity in contemporary society.

**Intellectual property**

A legal term for certain types of information, ideas, or other intangibles in their expressed form. Such unique works of the mind or the intellect can include everything from photographs to software design, etc. IP rights can be protected under the law in the same way as other property types using legal protection such as copyright, patents, and trademarks.

**Interactive television**

A form of television that allows users some form of limited interaction or content control.

**IP**

See *Intellectual property*.

**Market**

A context where goods and services are purchased and sold.

**MARS**

Monuments At Risk Survey. Commissioned by English Heritage, in the UK and originally published in 1995, the survey catalogued threats to ancient monuments in the UK.

**MCN**

Museum Computer Network. Based in the US, the MCN is a non-profit organisation of professionals devoted to supporting the cultural aims of museums through the use of computer technologies ([www.mcn.edu](http://www.mcn.edu)).

**MLA**

The Museums, Libraries and Archives Council. The MLA was launched in April 2000 and is the UK’s strategic body representing museums, archives, and libraries. The new institution replaces the Museums and Galleries Commission and the Library and Information Commission ([www.mla.gov.uk](http://www.mla.gov.uk)).

**Moveable cultural heritage**

A vast range of non-fixed cultural heritage items such as paintings, sculptures, ancient jewellery, grave-goods, sacred art, sculpted stone, and all kinds of works of ancient art.

**Multiplier**

The knock-on effects of an expenditure injection into an economy.

**Museum**

An institution that is open to the public, which acquires, conserves, communicates, researches, and exhibits, for purposes of study, education and enjoyment, material evidence of people and their environment. Museum collections now constitute a significant part of the cultural heritage.

**National Archives**
The National Archives of the United Kingdom was formed in April 2003 with the amalgamation of the Public Record Office and the Historical Manuscripts Commission. Its primary responsibilities are the records of central government and the courts of law (www.nationalarchives.gov.uk).

National Trust
Founded in the UK by three Victorian philanthropists in 1895 to protect places of historic interest and natural beauty for the nation. The National Trust is now the largest conservation charity in Europe (www.nationaltrust.org.uk).

NEMO
Network of European Museum Organisations. This is an independent network representing the European museum community. NEMO provides information to museums on relevant European Union initiatives, key legislative policy and funding concerning cultural heritage (www.ne-mo.org).

NOAA

Non-exclusive
These are goods where a user cannot be stopped from ‘consuming’ that good. Public goods fall into the category of being both non-exclusive and non-rival.

Non-market goods
Goods which have no market and no market price. Sometimes called non-monetary goods.

Non-market values
Benefits obtained by individuals without paying money to acquire them. These are often personal values that are not captured in traditional economic markets. Their value is usually estimated through survey techniques such as contingent valuation and choice.

Non-rival
Goods where the quality of consumption by one user is not reduced by other users enjoying it simultaneously. Public goods fall into the category of being both non-rival and non-exclusive.

Non-use value
The value placed on a site by individuals that do not use the site or intend to use the site in the future. Non-use values include existence, bequest, prestige, and altruistic values. Also known as passive-use value.

Open ended contingent valuation
A contingent valuation technique where individuals are asked how much they would pay for a particular cultural good.

Opportunity cost
The theoretical sacrifice that is made when resources are allocated to one specific project and so cannot be used for other projects.

Option value
A non-use value related to the value an individual attaches to keeping open the option of using a resource in the future.

Passive use values
See *Non-use value*.

**Prestige value**
A non-use value based on the prestige a community derives from cultural heritage.

**Profit**
The net earnings or income of a company or institution.

**Public goods**
These are goods that are non-excludable and non-rival. They are available to all, without excluding anyone, and a number of people can enjoy the good simultaneously without interfering with each other’s satisfaction.

**Restoration**
This is the process by which the fabric of a structure is returned to a specified earlier state, by reassembling the material from that site. This differs from reconstruction in that no new material is used.

**Reconstruction**
The use of digital technology to reproduce the exact form and details of all or part of existing or vanished structures as they were at a specific period in time. Alternatively, in the physical world, this is the process by which the fabric of a structure is returned to a specified earlier state, by reassembling the material from that site and incorporating new material.

**Recreation**
This is the creation of a structure or building using surviving evidence to extrapolate the nature of a presumed earlier state using new material.

**ROCE**
Return on capital employed. See *ROI*.

**Revealed preference**
These methodologies rely on actual consumer behaviour to determine values and benefits.

**Return On Investment**
The profit (or return) that an institution gets from spending capital. ROI is widely used to evaluate IT investments and provides an approximation on the return of a project without the use of more sophisticated economic analyses.

**ROI**
See *Return on investment*.

**Sequential bid**
A type of Contingent Valuation methodology where individuals are presented with a number of financial amounts that are increased until the respondent is no longer willing to pay.

**Socio-economics**
Socio-economic research analyzes economic phenomena by studying variables both inside and outside the economy. It is based on the premise that politics, culture, and history provide a context in which contemporary economics function.

**SPAB**
The Society for the Protection of Ancient Buildings. Founded by William Morris in 1877 to address the destructive ‘restoration’ of medieval buildings in the UK. Today it is the
oldest national pressure group fighting to save old buildings from decay, demolition, and damage (www.spab.org.uk).

Stakeholder analysis
The process through which the groups and individuals (stakeholders) who may be affected by a change are identified, and their gains and losses are quantified.

Starting point bias
The issue in valuation studies when an individual’s stated value is influenced by the starting bid.

Stated preference
A number of demand theory methodologies that are based on how consumers say they would react to changes in price.

SWOT analysis
This is an analysis of the internal and external environment of an organisation for strategic planning purposes. Internal factors are classified as strengths (S) and weaknesses (W), while factors external to the organisation are classified as opportunities (O) and threats (T). The SWOT matrix created can be used as the basis for strategy formulation.

TCM
See Travel cost method.

TCO
See Total cost of ownership.

TEV
See Total economic value.

TICCIH
The International Committee for the Conservation of the Industrial Heritage. An organisation dedicated to the promotion, preservation, conservation, investigation, documentation, research, and interpretation of the world’s industrial heritage (www.mnactec.com/TICCIH).

Total Cost of Ownership
This is the sum of all the costs associated with an item over its lifecycle. These costs include acquisition, installation, licensing, running costs, maintenance and sometimes even disposal. TCO is widely used in the business world for expensive capital items. TCO is sometimes referred to as Cost Of Ownership (COO).

Total Economic Value
The total of direct and indirect use values, option values, and existence values.

Travel Cost Method
A revealed preference valuation methodology that is based on the hypothesis that the travel costs an individual incurs in order to visit a cultural heritage site are related to the value of the non-market benefits of the site.

Urban heritage
The heritage of urban areas and its accumulation over time, including the history of its buildings, streets, districts, and residents.

Underwater heritage
This includes wrecks, such as ships, boats, aircraft, other vehicles and their cargo, in addition to other traces of human existence such as submerged cities, lake settlements,
and associated human objects. This heritage can be found in lakes, rivers, seas, and oceans.

**UNEP**
United Nations Environment Programme. A UN programme designed to provide leadership and encourage partnership in caring for the environment by supporting nations and peoples to improve their quality of life without compromising that of future generations ([www.unep.org](http://www.unep.org)).

**UNESCO**
United Nations Educational, Scientific and Cultural Organisation. Created in 1946 as an agency of the United Nations, whose remit was to promote world peace through its work in the areas of culture and communication, education, natural sciences, and social and human sciences ([www.unesco.org](http://www.unesco.org)).

**Use value**
The value placed on a site and resources by users of the site. Use value includes direct use, indirect use, and option values.

**WHIN**
World Heritage Information Network. An information network about the natural and cultural heritage sites on the World Heritage List ([www.wcmc.org.uk/whin](http://www.wcmc.org.uk/whin)).

**Willingness to accept**
The willingness of an individual, group or society to accept compensation for the loss of a good or service.

**Willingness to pay**
The willingness of an individual, group or society to pay for a good or service. In a conventional market, individuals who express a WTP equal to or higher than the market price for a good will purchase the good in question, while those with a WTP lower than the market price will not purchase the good.

**World Heritage Convention**
Officially known as the ‘Convention concerning the Protection of the World Cultural and Natural Heritage’, although more commonly known as the World Heritage Convention. It was first proposed by the United States in 1972 and adopted by UNESCO in 1975 in order to protect the world’s natural and cultural heritage.

**World Heritage Fund**
The World Heritage Fund was established by UNESCO to provide international assistance to protect the world’s heritage. It is sustained by fees derived from member states, and voluntary contributions from countries, private organisations and individuals.

**World heritage list**
The UNESCO list of World Heritage sites. Cultural and natural heritage sites outstanding universal significance defined according to the World Heritage Convention.

**World heritage site**
A site designated by UNESCO as being of outstanding universal value from the point of view of history, art, or science.

**WTA**
See **Willingness to accept**.

**WTO**
World Tourism Organisation. The WTO was founded in 1974 out of the International Union of Official Travel Organisations (IUOTO). In 1976, WTO became an executing agency of the United Nations Development Programme (UNDP) and in 1977 a formal cooperation agreement was signed with the United Nations itself. The WTO is now a specialised agency of the United Nations (www.world-tourism.org).

WTP

See Willingness to pay.

WTTC

World Travel and Tourism Council. Represents the private sector in all parts of the world travel and tourism industry. The mission of the WTTC is to raise awareness of the full economic impact of travel and tourism (www.wttc.org).
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EPOCH

EPOCH (Excellence in Processing Open Cultural Heritage) is a Network of Excellence supported under the European Commission’s Framework 6 (IST-2002-507382). The network joins academic, research and cultural institutions to improve the quality and effectiveness of the use of IT for Cultural Heritage. EPOCH brings together expertise on monuments sites and museums and seeks to enhance the economic impact of these potential tourist venues. An explicit part of EPOCH is to identify the economic impact of the sites on their regions and report on good practice in technological investment to enhance that impact. The objective is to address issues such as sustainability, return on investment, effective deployment of technology and multipurpose data capture.
CUBIST

The EPOCH Network of Excellence has a remit to research cultural heritage sites. Within this network considerable effort is devoted to the study of the socio-economic impact of cultural heritage sites across Europe. However, many of the issues associated with heritage apply equally to the broader cultural sector. In order to allow the greatest dissemination of research EPOCH and the University of Brighton Business School have created CUBIST Research (Cultural Business: Impact Strategy and Technology management).

CUBIST Research is a broad network of practitioners, researchers and consultants with members from across Europe. CUBIST Research adopts a holistic approach to addressing management problems in the Cultural and Heritage sector. The group offers specialist research and consultancy on the following areas:

4. Strategic planning
5. Marketing and revenue raising
6. Socio-economic impact studies
7. Technology strategy, project management and impact evaluation
8. Building partnerships to deliver technology solutions from strategic vision to completion.

CUBIST Research and the EPOCH socio-economic impact research group conduct socio-economic impact assessments on cultural heritage sites across Europe. For more information on EPOCH visit http://www.epoch-net.org/, and for the CUBIST Research Group visit http://www.cubistresearch.org