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From Heritage to Historic Environment: Professionalising the Experience of the Past for Visitors

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Abstract: The heritage sector in the UK has seen unprecedented change over the past decade as a result of changes in: Government attitude toward and intervention in the sector; new funding mechanisms; changes to legislation and policy; new methods of interpretation; and, in particular, the growing dynamism in the relationship between the sector and other sectors which utilise heritage as a resource. In this paper, changes in the utilisation of heritage as a resource for tourism will be reviewed, highlighting broad areas of common change and development, and will point to the notion of 'professionalisation' as the unacknowledged facilitator in the sectors' current respective trajectories.

Keywords: Heritage, historic environment, professionalisation, visitor attractions, resource management, organisational change.

The Heritage Sector

Heritage is, at the same time, both a simple and complex concept. Many academic texts in recent years have striven to place heritage into the realm of academy as a subject in its own right (Carman, 2002; Howard, 2003), or at least to develop a body of theory which can account for its multivariant form and titular application to places, structures, items and objects which might otherwise be deemed the intellectual property of the museum curator, the architect or the historian (Graham et al, 2000; Merriman, 2004). For all the intellectual argument over the form and content of heritage as subject, it is in the practical application of heritage terminology and heritage procedure that has given the greatest body of evidence for defining heritage's role and raison d'etre in a personal, professional, subjective and objective context. Thus, 'classic' heritage texts, typified in the past by Cleere (1984), Lowenthal (1985), Wright (1985), Hewison (1987) and more recently by Lowenthal (1998), Clark (2001) and Aplin (2002) show a clear divide in approach between heritage as applied history and heritage as historic resource.

Intellectual development of the subject aside, the historic and cultural connotations of heritage as place, heritage as identity, and the notion of the 'heritagescape' (Garden, 2004 - see also her paper within this issue) means that it has found its place in the modern world by acting as a socio-cultural resource for other interests and within business contexts. If perceived wisdom is accepted that definition of heritage is fraught with difficulty (Skeates, 2000), and one ignores those tortuous definitional arguments, taking heritage at its face value

highlights its place in official, unofficial, professional and personal parlance. At once, nobody can define exactly what heritage is, and yet everybody instinctively knows what is part of 'their' (personal or national, and even international) heritage. As this paper discusses, the democratising influence of management as a science and the inherent professionalism which it brings when applied to heritage, has also democratised heritage. Ownership of those historic and cultural connotations has never been easier, whether or not those owners have a legitimate right or authentic link to that past. In the UK, the heritage label is clearly seen in public life – ranging from application to organisations such as the Government's English conservation advisors (English Heritage) to the lottery-money distributor, the Heritage Lottery Fund. Central Government even established a Ministry called the Department for National Heritage in the late 1980s, with a broad cultural remit stretching from sport to arts and media. (It was later renamed for political reasons as the Department for Culture, Media & Sport when New Labour came to power in 1997).

Where did the Historic Environment come From?

Persistent problems of definition spilling out from the academy, combined with the progress of management outwith as well as within the sector (as well as management more generally as a discipline (Baxter, forthcoming)) have given rise to a new moniker for the sector, which is now used more generally than 'heritage' – that of 'the historic environment'. This term has existed for some while (Baker 1983; Baxter 2003), though only recently has come into standard use in professional practice. This seemingly innocuous name change has achieved a number of things. Firstly, it has clearly differentiated the academic consideration of heritage from the professional practice of managing the historic environment. Secondly, it acknowledges clearly the role of proactive management and need for strategic direction and purpose within the sector, by recognising that heritage assets are part of a broader physical context which must be considered as a whole environment. This second effect has also placed the sector on a par with other 'environmental' disciplines with more developed management structures (and better public perception of what the sector does), i.e. natural environment and built environment. Environmental 'assets' can thus be identified, compared and valued (Countryside Agency, 2003). Thirdly, the tautological differences between conservation and preservation, and whether management of heritage assets is a barrier to development is removed (Kincaid, 2002). Administration and application of backward-looking heritage protection legislation thus becomes (in concept and perception if nothing else) modern and focused, valuing heritage assets amongst other aspects of our everyday habitat.

Most importantly, for the context of this paper, is that a change from heritage to historic environment has placed the sector at the heart of tourism

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development and community regeneration, both as a stakeholder and strategic leader in the process, rather than simply as a provider of an asset for exploitation by tourism or other sector managers. It would be naïve to suggest that a simple re-branding of the sector from heritage to historic environment has brought about such a profound change, not least as there is no one organisation which directs heritage management in the UK, but usage of the term can be measured incrementally against equivalent changes to management structures, attitudes, treatment and acceptance of the role the sector can play as its external environment has changed over the past five years. It has also potentially brought scope for clarity of thinking about the wider role of heritage within society, acknowledging the interplay of the relationships between practical and theoretical considerations of historic assets existing in the modern world. Essentially, with heritage now being valued in differing ways (de la Torre, 2002; NERA, 2003; Jowell, 2004) management of the historic environment in the UK can now be compared more readily with Cultural Resource Management in the USA (King, 1998) and Australia (Australian Heritage Commission, 2003).

A Hypothesis on the External Perception of Internal Change

The preceding sections have briefly summarised certain issues relating to the change in the sector which relate to terminological change from heritage to historic environment. However, it is important to recognise that this change is an internal management transformation which represents change behind the scenes in the sector (Baxter, 2002). It must be questioned whether such a label change has either been noticed externally by an external 'consumer' of sectoral products and, more importantly, whether an overall change of approach in management within the sector, due to internal and external pressures (and typified by this change in terminology) has affected the relationship between historic environment manager and product consumer. If, as has been hypothesised, a change in nomenclature is representative of a far wider-reaching change, then it should be tested at the consumer interface, where consumer reaction is most obvious.

This is perhaps most obviously tested in the allied tourism sector, which arguably, in the UK, is underpinned by heritage products in the form of historic sites, monuments and the varied architecture which makes up street- and town-scapes (BEFS, 2004). As within the core disciplines of archaeology, architecture etc. themselves, individual sites, buildings and monuments are now considered as a part of the wider physical environment, and as providing the historic dimensions to it. 'Characterisation' is the process by which identification and value of those historic features is most usually undertaken (Fairclough & Rippon, 2002). Individual heritage sites thus provide the main reason for visiting many of the UK's towns and cities, and the historic environment

therefore provides the backdrop to touristic activity within the cultural sphere (Richards, 2001; Timothy and Boyd, 2003). Two questions are foremost in examining the changing relationship between the historic environment (née heritage) and tourism (cultural tourism in particular) – firstly – what is the role that heritage now plays in tourism, as influenced by the new approach in its own sectoral management? Secondly, what is the implication of this newly developing role for the consumer or visitor?

What is therefore being suggested in the relationship is that a change can indeed be seen from simple administration of the heritage resource to a more sophisticated form of strategically managing the relationship of the resource and the resource user, and that this incremental change over many years has reached a critical point where the shift in balance can be clearly noted. The historic resource: the castle; museum; archaeological site; and even the listed building in the High Street is thus no longer treated as a static product for consumption and contemplation out of context from its surroundings. The tourist now has the option to consume (ipse dixit Urry, 1995) the product as part of a process of immersion in the historic environment / the past at a particular geographic location. This closely reflects the wider trend in tourism and site interpretation, focusing on providing for the visitor an immersive or authentic experience (Midtgard, 2003; Shaw & Williams, 2004). Internally, within the sector, the feedback to management strategy of heritage visitor attractions moves from visitor numbers as an output towards enhancement of the visitor experience as an outcome. This subtle shift seen towards soft targets for organisations, such as the governmental heritage agencies (English Heritage, 2003; Audit Scotland, 2004) in turn enhances the view of management of the resource, with a greater appreciation by visitors and the wider public of the necessities of commercial utilisation of heritage. The change in approach is shown diagrammatically in Figure I.

Figure I: Actual and Perceived Change in Relationship between Historic Visitor Attraction Management and Consumer Understanding
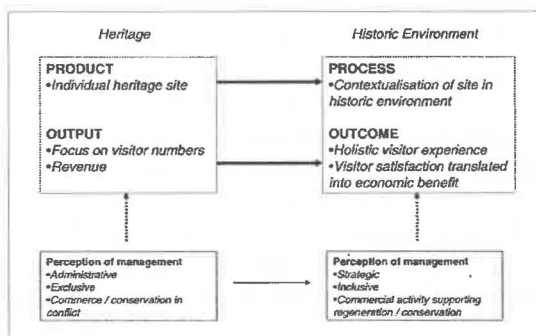
The visitor, as borne out in surveys conducted both within the confines of heritage sites and in other locations (MORI, 2000; MORI, 2001; Historic Scotland, 2003), is being given the opportunity to react and interact with heritage and the historic environment in new ways. Visitors are no longer treated as an homogenous group, but as users of a resource with specific defined needs (within the standard course of behaviour for touristic activity) as well as undetermined needs which may be fulfilled by heritage site operators who may offer 'bonus' experiences which appeal to a particular visitor segment (in turn generating additional income for the site operation, and enhancing satisfaction levels) (VisitScotland, 2004a). None of this should come as any surprise to management operations and organisations accustomed to operating as a full part of the tourism sector, however, heritage management is only now beginning to fully recognise its role within the tourism sector, and has never truly professionalised the relationship between the sectors, fully appreciating the demands within the leisure service sector.

Professionalisation of Heritage Tourism

Professionalisation of the relationship between heritage and tourism has come largely by impetus from the tourism sector and changes brought about over the past decade in terms of both demographic demand for and expectation of its products and changes in the structure and infrastructure of the industry (dealt with at length elsewhere, such as Page et al, 2001). Heritage tourism, as a focused variant of cultural tourism (Timothy & Boyd op. cit.) has led to refinement in definition of visitor attractions, to include heritage visitor attractions as an identifiable cohesive grouping (Millar, 1999). These in turn can be broken down into a variety of different types of site and tourist experience, sub-groupings large enough to provide vital management information in the form of visitor statistics and revenue trends which typify the step-change in the tourist industry to base decision-making and development around a firm evidence base. The intricacies of the development of management information (statistical) are also considered elsewhere (Baxter, 2003), with their necessity due to recognising the role that tourism is an industry suffering from high levels of fragmentation and yet providing a huge economic mainstay for national economies on a global basis (WTO, 2003). Thus, as tourism management information has become sophisticated, by default information on heritage sites (where touristic activity takes place) has also become highly sophisticated. Typical of this are the surveys of visits to visitor attractions, undertaken by the national tourist boards in the constituent UK countries (VisitBritain, 2002; VisitScotland, 2004b). The importance of heritage sites can be seen at first glance of the league tables of visitor numbers at the top performing sites. Indeed, it is from tourism statistical sources that claims can be made for heritage providing the backbone of the tourism industry in each nation (VisitBritain, op. cit.).

This sophistication in information, and identification of niche tourism markets over the past five years has been a parallel development with calls for evidence-based policy making across the public sector (which is the largest 'producer' of the heritage resource in the UK) (DCMS, 2004a). As Culture has established its place in the portfolio of Central Government ministries, so the spotlight has finally fallen on the so-called 'cultural industries' (DCMS, 2004b) to fully account for public support which it receives through the taxation system. Arts, crafts, museums and galleries arguably developed systems of accountability first in the cultural grouping, leaving the disparate heritage sector (a huge group of NDPBs, NGOs, local organisations and small private operators) on the back foot when it came to arguing for public support. Furthermore, whilst heritage was beginning to place its individual sites and objects into broader contexts of landscapes and historic environments, the natural environment sector (which shared those '–scapes') was heralding its achievements and justification for support through high profile 'State of . .' audits (Countryside Agency, 2004; English Nature, 2004). The heritage sector has therefore been playing a game of catch-up with both of its main linked sectors (natural environment and tourism) in terms of accountability, profile, presentation and strategic thinking.

The complicated picture is further confused by adding in the wider Government ideals of sustainability, social inclusion, community regeneration and economic stability, which are at the heart of New Labour thinking, and which are expected to be translated through Central Government Departments into the respective public and private sectors. Across all areas of the heritage sector there has been common thinking that it could as a sector deliver on these issues – but it needed to get its strategic thinking and management information systems in order. With some degree of effort, including huge investment by public organisations such as English Heritage and the Heritage Lottery Fund (in England), progress has been made on catching up – exemplified in the development of State of the Historic Environment Reports by English Heritage (English Heritage, 2002a, 2003; Baxter, 2003). It is unsurprising to note that the tourism management information pertinent to heritage sites provided the largest and most robust datasets in the pilot reporting (Baxter ibid.) given the faster development of strategy and requirements for currency in management information in the allied tourism sector.

Recognising the Contribution of Heritage to Tourism

As already noted, there is no single factor which has brought about the levels of increased professionalisation in heritage management, but more a critical mass of expectations placed on the heritage sector stemming from academic development within and external pressures outwith. In recognising heritage as a historic environment, a historic overlay to our everyday habitat, there is reinforcement away from management of individual elements in isolation, to

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a focus on the way in which the past is experienced in differing physical forms around us. Those physical forms of heritage, in the majority of cases by virtue of projected image and perception, are the heritage visitor attractions which we know of through individual expectation or as a generic resource group. Stonehenge, The Tower of London, Edinburgh Castle, Chatsworth and St Paul's Cathedral thus continue to be individually known as tourist itinerary hotspots. As a generic resource group, archaeological sites, palaces, castles, stately homes and cathedrals, are groupings with their own characteristics and significance which can be studied to provide insight into the experience that a visitor can expect at a certain kind of site in a certain kind of place.

This is an experiential approach which is bound closely to the successful development of niches within heritage tourism geared around historic locations and destinations, and also thematic niches which link social motivation and appropriate physical experiential tourist resource (such as genealogical tourism (McCain & Ray, 2003)). Within the academy, subject development has also seen a rise in appreciation of the sociological experience of place and space, through disciplines including archaeology, architecture, cultural studies and anthropology (such as National Trust, 1995 or Bender, 2001). From a tourism industry perspective, the driving forces in the definition of the heritage tourism subgroup include: the growth of niche tourism (Page et al op. cit.); post-industrial regeneration of urban areas for tourism purposes (Liverpool City Council, 2004); heritage visitor attraction development (and adaptive re-use of historic buildings) (Kincaid op. cit.); legible city initiatives (Bristol City Council, 2001); lottery development and Millennium investment in new attractions (HLF, 2004); development in cultural interpretation and use of technology; and, service quality enhancements (Drummond, 2001). These external driving forces have affected the managing agencies within the heritage sector substantially due to the fact that the sector's portfolio of sites (and key location of public interaction with the sector) has effectively been reconfigured from a standpoint geared around the consumer, rather than the overarching conservation ethic as applied to a site. Fuelled by media interest, the public in recent years has increasingly questioned (from an inquisitive rather than critical standpoint) how the heritage is preserved, what is preserved, and what is presented about it. British television series such as 'Time Team', 'Time Flyers', 'The House Detectives' and most recently 'Restoration' have put practical heritage management in the limelight. The enduring appeal of the television costume drama, nostalgic light entertainment such as 'Monarch of the Glen' and the increased filming of period novels such as 'Gosford Park' has brought an explosion of interest in experiencing the past as seen on the small or large screen. The sophisticated tourist has an increasingly well developed set of requirements for their heritage experience, and the heritage visitor attraction sector is expected to professionally deliver an enduring experience of history and the past. The combined pressure of tourist interest balanced with

conservation need for investment has required such professionalisation of engagement between heritage managers and tourism developers – and more often a synergising of these skills within the same organisation.

Current Expectations placed on Heritage Visitor Attraction Operators

The tourist attraction stock as has been shown has become increasingly differentiated and through ongoing new development and reinvestment is subject to increasing levels of competition between sites (Yale, 1998). Heritage visitor attractions as a subgroup of tourist attraction are no exception, and whilst mindful of the broader cultural goals for the heritage sector, where sites contribute to our understanding of society and its past, management of the stock of historic buildings and monuments can no longer be on a privileged 'showcase of the physical past' basis. Regardless of the statutory or moral duties of the organisation which manages the site (which here includes private owners), heritage sites are in the same arena as other tourist activity sites and locations for leisure pursuits. In certain respects, the removal of the conceptual 'picket fence' from around many of the country's historic sites (the boundary that divides past historic environment from present environment), means they are considered as just another part of the broad historic environment and has made the job of competing in the tourist market more difficult. Blending in to provide the heritage backdrop for urban and rural destinations therefore has a potentially disadvantageous side for heritage commercial tourism success.

One of the ways around this dilemma is to build a relationship between the heritage organisation and the consumer, using organisational channels rather than relying on the appeal of individual sites on an off-chance or itinerary basis. This requires a thoroughly business-oriented strategic approach to managing the tourism offering, and places the interaction with the tourism sector at the heart of any developmental strategy for a heritage organisation. This has been seen as a major developmental goal in the large heritage organisations over the past 4-5 years, led by the charitable organisations which are do not have a financial cushion from the public purse. The National Trust and National Trust for Scotland have undertaken brand development work, and are increasingly engaging the public in their organisations' work through specialised audience engagement projects such as the Ben Lawers Historic Landscape Survey (see www.benlawers.org.uk). Equally, sites in their care are seeing increasing emphasis on interpretation and visitor service development, to attract and retain visitors for longer periods than the 61 minutes which are on average spent at a site (English Heritage, 2002a: 55). Equally, the public sector heritage organisations, including Historic Scotland, English Heritage, Cadw, Historic Royal Palaces and the Royal Parks Agency are increasingly concerned with their brand image, and have invested heavily in organisational

marketing and promotional campaigns as well as site improvements (reported in respective organisational annual reports).

The private sector heritage owners and operators, which is by far the most reliant on the market forces acting within tourism have also boosted their collective management support, through increasing diversity in activity and advocacy of their representative body, the Historic Houses Association. It has centrally developed marketing tools on its website (see www.hha.org.uk), has increased its regional campaigning work in devolved areas (Hervey-Bathurst, 2004) and is playing an active co-ordinating role in the developing strategic and research agendas for the sector and disseminating best practice work (BEN, 2004; Waterfield, 2004). It is worth remembering that the majority of heritage sites utilised for tourism visits were never intended for such use, and as such are subject to physical demands as well as the more general pressure of desire to visit by tourists.

Therefore, through major programmes of marketing, heritage brands have been developed by respective conservation organisations, providing a further relationship channel with the public that can last longer than the individual site visit. These brands have been extended through to membership schemes – the most enduringly successful being the National Trust with some 3.3 million members (National Trust, 2004). Museums and galleries, which need to be considered slightly differently to heritage sites for a variety of reasons (Dunlop et al, 2004) are also using 'Friends' schemes, which have attracted large numbers of supporters, developed as a core group of repeat visitors and therefore repeat revenue streams. This brand development is particularly important in the development of information distribution channels (advertising and interpretation) on the internet. This corporate image of heritage thus professionalised again places the sector on the same footing as other tourism businesses attempting to attract visitors and income.

This dynamic development over the past five years which has been seen between the heritage sector and the tourism sector has been aided by the policy clustering within the DCMS, and the increasingly business-minded focus for that Department (DCMS, 2004c). As the Government encourages its Agencies to engage with its socio-political priorities (already discussed), so the heritage sector which is dominated by the public sector as a consequence of market failure (NERA op. cit.) is required to minimise that reliance on public support by synergising further with commercially successful policy areas (i.e. tourism).

The key expectations placed on heritage visitor attraction operators can be summed up as the requirement to provide an improved experience in accord with developments across the tourism industry, reflecting consumer demand for value, quality and enjoyment. These three desires can be matched in public policy terms by the expectations placed by Government on the sector for access,

inclusion and minimisation of direct financial support from the taxpayer. The change in approach to management therefore has to have an in-built desire to deliver value for money and a high quality experience. Heritage sites are not accepted by either Government or the visiting public in their traditional form as austere, unwelcoming monuments with few visitor services and little interpretation. The democratisation of heritage as a historic environment owned by everybody has meant that the management ethos has changed to address the changing public need and also the commercial imperative (through competing in a leisure market, and also being required to minimise the costs of support for a social good).

Actual change at sites has been large-scale and widespread fulfilling visitor needs established as norms for attractions (Caulton, 1999). With access at the heart of tourism planning (Hall, 2000), sites have improved the experience using a range of developments in interpretation. Changes have been seen in static interpretation on-site, guides, web materials, virtual tours, educational materials, introduction of live events, handling boxes and so on. Publication schemes which are interpreting the broader aspects of the historic environment have also become available in increasing numbers, as have interpretive materials on the smaller heritage sites (the majority) which have no need or ability to support tourist visitor infrastructure but which can add significantly to a visitor's experience of a location (e.g. the 'Heritage Unlocked' series of guides produced by English Heritage (English Heritage, 2002b; 2002c)). Physical access has been improved through increasing awareness (and requirement) of the needs of disabled, less-able and elderly visitors (which comprise a significant segment of the potential tourism market). Service quality has also been addressed through comprehensive staff training schemes, and enrolment of sites into tourism industry schemes such as the Green Tourism Business Scheme (VisitScotland, 2004c). Guided tours, which were often a feature of heritage sites decades ago have come back into fashion as interpretation theory has developed, and the effects of the personal relationship made between site guide and audience has been acknowledged.

Conclusion: *Experiencing Heritage as Leisure-Managing Heritage as a Resource*

The exploration of changes seen across the sector has been necessarily brief and patchy in focusing on specific instances of change. The imperative has been, however, to highlight the fact that the heritage sector has changed substantially and to look at some of the driving forces behind those changes, particularly the effect of relationship development between heritage and tourism. The historic environment sector is currently a sector in flux. Heritage has found a place at the heart of culture, but still not necessarily within the ambit of cultural policy study (which still focuses on the arts and creative industries) (Dunlop et al op. cit.). Equally, heritage has become a key leisure

resource - in addressing the socio-political aims deriving from the government of the day it has not only reconfigured its resource as a niche tourism product, but has provided new ways of accessing and experiencing the past as an everyday resource within our urban built and rural environment. It is also as a social stimulus for regeneration and community development, yet heritage is still not fully linked into thinking on leisure and cultural policy. Furthermore, flux is seen in the shift from heritage to historic environment – symptomatic of change in management – yet still suspicious of management as a discipline. The sector is embracing change, but it is early days in terms of understanding such change and the driving forces and conflicts within it.

Much of the change and the tensions are behind the scenes. The experience of the past by the tourist, through visitation of heritage sites, is one of the most obvious barometers of this change however. The continuing success of heritage visitor attractions within league tables suggests that the approach taken by the sector as a whole in its relationship with the tourism sector is proving successful currently, although as visitors become more diverse and discerning the sector needs to keep apace of fast-changing demand issues. This visible change, though itself limited in scope, suggests that the concept of professionalisation is one which can be applied to the process of change, typifying the way in which the sectors are relating to each other, are effecting internal transformations, and are turning simplistic consumption of heritage products into a more complex and enriching experience of the past via the historic environment.

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