



## THE ARTIFACT, ITS CONTEXT AND THEIR NARRATIVE: MULTIDISCIPLINARY CONSERVATION IN HISTORIC HOUSE MUSEUMS

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### Abstract

How can ever-increasing numbers of visitors enjoy their experience of a historic house and understand its significance, without compromising the physical survival of its interiors? The National Trust for England, Wales and Northern Ireland, a UK conservation charity, is fostering the collaboration of conservators with gardens advisers, learning and interpretation consultants, and property staff. They are developing methodologies which combine an assessment of how visitors can be physically accommodated in sensitive interiors with 'story-telling' narratives, to build a planned, coherent, emotionally engaging experience for visitors.

### Keywords

Historic house, preventive conservation, visitor, access, experience, capacity, sustainability, interpretation

## Conservation for Access Redux: Narrative, Visitor Flow and Conservation

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### Introduction

As the leisure industry grows more competitive, and people become more discriminating in how they spend their time and money, how can heritage bodies refresh what they offer to maintain and grow support, whilst preserving historic assets for the long term? This paper presents methods developed by the National Trust to tackle this challenge. As a private charity whose purpose is '*...promoting the permanent preservation for the benefit of the nation of lands and tenements (including buildings) of beauty or historic interest*'<sup>1</sup>, the National Trust is independent of government and state funding. Instead, it relies on membership subscriptions, gifts, legacies, income from its commercial and investment activities, and admissions to the historic houses and gardens it opens to the public at a charge (Figure 1).



Fig. 1 *The Vyne from across the lake in 1755*, by Johann Heinrich Muntz (1727-1798) © National Trust Images/Derrick E. Witty. Founded in 1895, the Trust now owns over 300 historic houses, 250,000 hectares of land and 700 miles of coastline visited by over 90 million people each year – 17 million to houses and gardens.

The National Trust recognises that people value its work but do not necessarily feel personally committed to supporting it. So the Trust now aims to nurture ‘people’s love for special places’ so they form a more emotional connection with its properties, feel closer to its work, and thus more inclined to provide support [National Trust, 2010]. The Trust’s measurement of how enjoyable visitors find the time they spend at properties through exit questionnaires demonstrates that enjoyment is improved by getting the basics right, by providing high quality customer service, and creating richer experiences through a compelling narrative and excellent presentation, all based on sound research and high standards of conservation. This paper explores how professionals in conservation and access can use each other’s skills to manage visitor flow in historic houses. By combining goals - preventing overcrowding and telling a great story through optimising the use of space –two activities, which are often cast in opposition, can be united.

### **Conservation for Access (C4A) toolkit**

Over the past 30 years, visitor numbers at National Trust properties have increased dramatically, from 6 million in 1978 to 19.4 million in 2011 [National Trust, 2012]. Targets become ever more ambitious, seeking another 10% visitors each year, and prompting national and regional managers to open properties for longer hours per day, and more days per year, to maximise revenue from sales of tickets, refreshments, gifts and books <sup>2</sup>.

Meanwhile, collections conservation and gardens advisers identified a related increase in wear - damage to surfaces caused by overcrowding and lack of maintenance - particularly at properties where teams of property staff were too small to support visitor access as well as care for the house or its garden [Calnan, 1999]. At the same time, property managers felt under pressure, being pushed and pulled in different directions: urged by conservation and gardens advisers to hire more staff to maintain conservation standards and by operational managers to control or reduce staffing costs [Lithgow, 2011].

In 2000, collections conservation and gardens advisers agreed with the head of customer services that it was time to resolve a growing conflict between conservation and access. Cross-functional collaboration between national advisers, regional managers and local operations staff generated the concept of a ‘toolkit’. Its purpose would be to help property managers to assemble the information required to make effective decisions, balancing greater access and higher standards of presentation with conservation for a more sustainable future.

The ‘Conservation for Access’ (C4A) toolkit is in three parts:

- An initial flowchart ‘decision tree’ - prompting managers to establish whether they already have sufficient data to assess whether the property has sufficient resources to achieve conservation, staffing, access and income targets for a given pattern of opening;
- Where this information is lacking, a series of spreadsheets are used to gather this data consistently, and assess objectively the impacts of access on housekeeping and gardening;
- A report draws the data together for collaborative discussion by a multi-disciplinary team (curator, conservator, gardens adviser, financial and marketing consultants and property staff); it establishes the costs of maintaining conservation standards, while optimising the amounts and different types of access, which a property might provide. The report concludes with a summary of this discussion, and an agreed strategy for future growth, in which income from greater access contributes directly to the associated costs of preventive and remedial conservation [National Trust, 2011].

Since the introduction of C4A toolkits in 2005, over 150 reports have been completed by properties proposing to change or increase their access arrangements. It takes on average 26.5 days over the course of a year to collect benchmark data for the initial toolkit, and each subsequent review requires another 5.5 days.

## Visitor Experience Design (VED)

At the same time, properties were making improvements to visitor facilities, such as reception areas or the restaurant, without considering their effect on visitors' experience of the whole property. Such incremental changes in presentation and management which address one issue at a time can, cumulatively, result in a negative impact on the 'spirit of place'. 'Visitor Experience Design' (VED) is the National Trust's most recent approach to planning intellectual as well as physical access in a more holistic way. The intention is to create a vision for the place lasting ten or more years into the future, with potential changes mapped onto all spaces across the site to understand their interaction. When an opportunity to make an intervention arises (for example, when funding becomes available, or the end of a tenancy brings a building back into National Trust management), the vision informs the property manager's decision.

VED aims to consider all aspects of the visitor journey at the same time. Presentation, conservation management, visitor flow and interpretation are combined and the inter-relationships between these explored and understood. The process starts with a deep understanding of the theme and spirit of each place and a detailed analysis of the audience. It takes an integrated approach, which uses techniques from both interpretive planning and commercial master-planning. For example, the Trust has worked with VisionXS, a company which regularly surveys leisure customers across the UK, to get a snapshot of what appeals to different age groups, and then assesses the psychometric appeal of the existing or proposed elements of the visitor experience, by rating the psychological appeal of these elements against the site average and the leisure industry benchmark (Table 1).

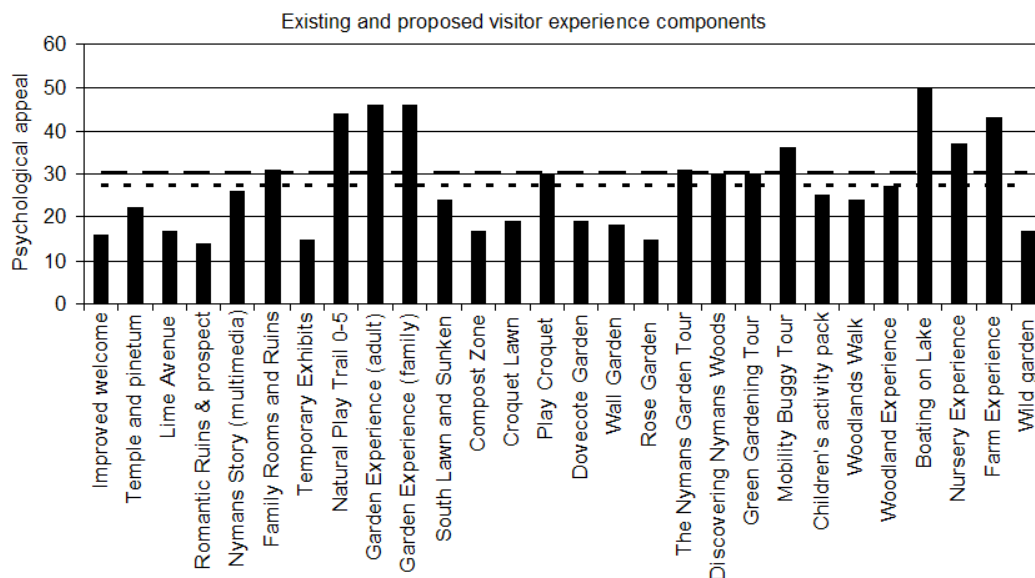


Table 1: Example of analysis commissioned from VISIONXS by the National Trust. The psychological appeal of current and potential components of visitor experience are rated against the site average and the leisure industry benchmark.

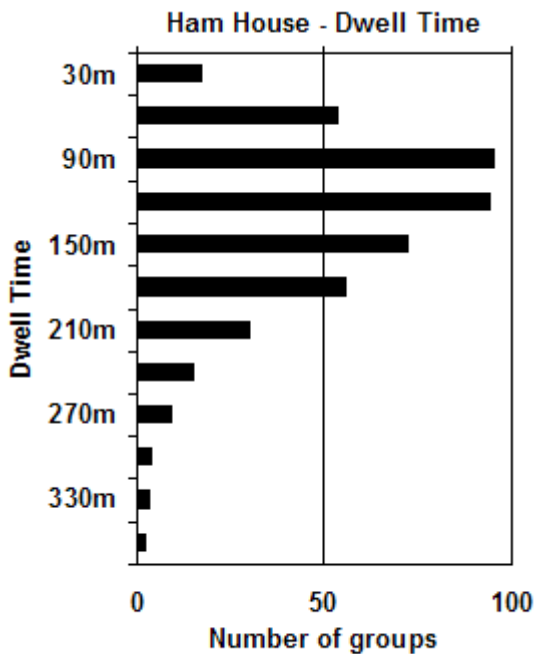


Table 2: Investigating visitor dwell time at Ham.

This partnership revealed some gaps in our knowledge of visitor behaviour. Until this year, most properties could only guess at the average time visitors spent on site (dwell time); this was usually overestimated, unless specifically researched, as at Ham House in 2011. Here, the admissions team used numbered vouchers to record visitors' time of entry and departure to measure dwell time accurately. Graphing the data shows in minutes the amount of time spent on site, varying from 30 minutes to five hours (Table 2). However, the measurement was of the time spent by visitors on the whole site, rather than in individual elements, such as the house or garden.

### Visitor behaviour revealed in C4A data

Property managers and visitor experience consultants soon realised that property staff and conservators had already collected data useful for VED, including dwell time, visitor capacity and flow in houses and gardens through the C4A toolkit. This assesses the desirable capacity of each space for visitors and the total capacity of the house or garden at a moment in time. The toolkit

also monitors dwell time in individual spaces, and the average length of stay in a house or garden. Using the data for total capacity and average length of visit, property staff can calculate a rate of entry to the property which delivers an enjoyable experience for visitors without creating overcrowding and risks to historic objects and surfaces. This information also enables property teams to plan the capacity of other visitor facilities (car parks, lavatories, restaurants), and consider opportunities for developing attractions on the wider estate, which might relieve visitor pressure on the house and garden and generate more revenue.

### Audience development at The Vyne

The Vyne is a small estate near Basingstoke, Hampshire, visited by both Henry VIII in 1510 and 1535 and Elizabeth I in 1569 and 1601. The house, originally built between 1500-1520, is valued for its association with Strawberry Gothic; its owner, John Chute, contributed to the Committee of Taste which from 1749-1776 advised Horace Walpole on the remodelling of his country house, Strawberry Hill, in Twickenham [Howard, 2006; Chalcraft and Viscardi, 2007]. The Vyne's significance encompasses notions of past grandeur, antiquity, high taste, outstanding talent, romanticism, simplicity and domesticity. The spirit of each era has been honoured by every successive generation and is still discernible in fragments, but needs recognising, nurturing and celebrating.

The market potential around The Vyne is almost seven million people (Figure 2). This number includes the population living within 60 minutes' drive time, and domestic and international holiday makers visiting the area. There are currently around 115,000 paying visitors to the property, around 1.5% of the local market. Consumer analysis of populations whose profiles match those of National Trust members, but who are not yet members, and who live within 20, 40 and 60 minutes' drive from The Vyne, suggests that the National Trust might expect a property on this scale to attract 1.75% of its market potential. A really successful site of a similar size might draw 2.5%, equivalent to another 60,000 visitors per year at The Vyne<sup>3</sup>. In terms of the

number of visitors which can be accommodated without damaging sensitive interiors, the house is currently operating close to capacity, so the challenge is how to create a visitor experience which can satisfy this increasing demand.

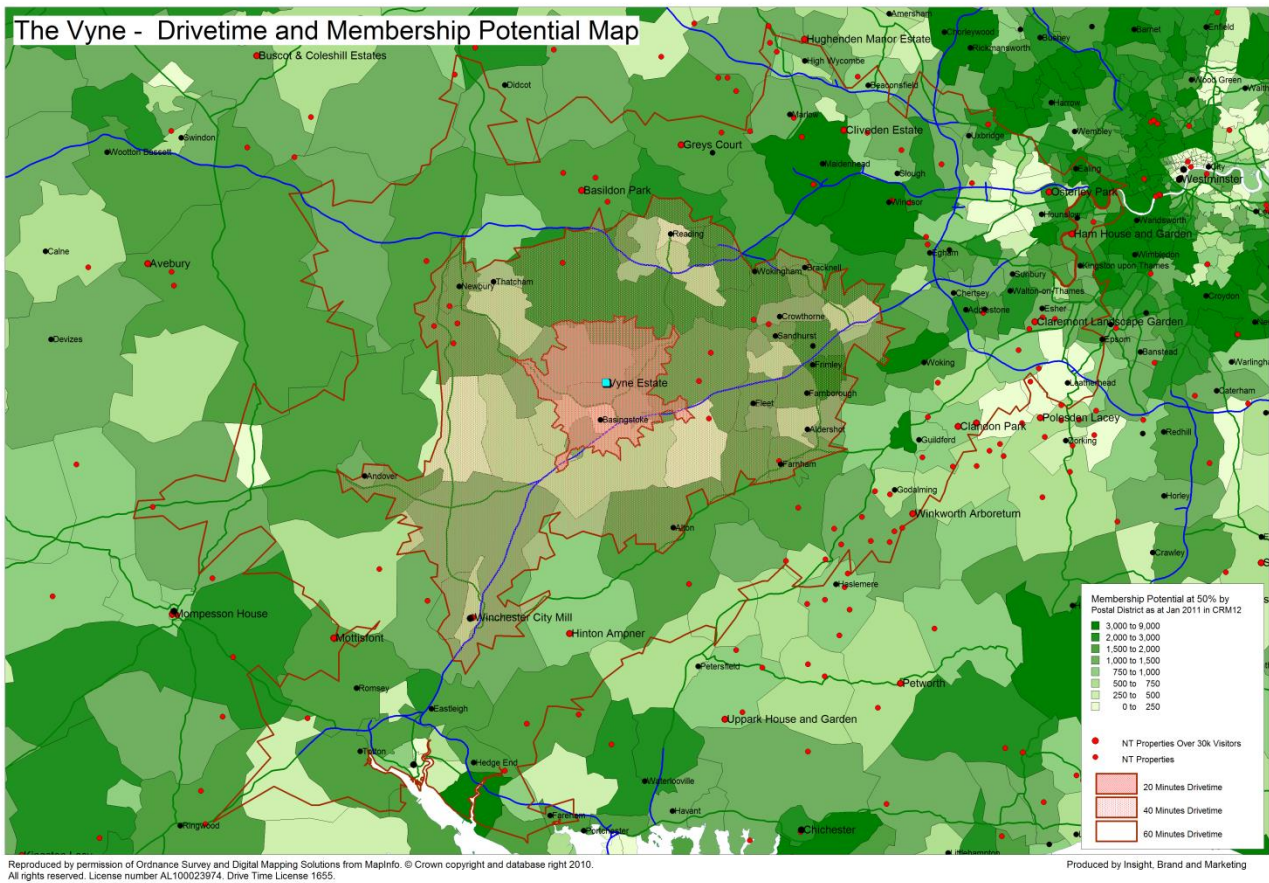


Figure 2: Assessment of market potential for the Vyne, based on cross-referencing MOSAIC data on populations whose profile matches that of National Trust members, but who are not yet members, and who live within 20, 40 and 60 minutes' drive from the property [3].

## Visitor impacts on conservation

Higher visitor numbers increase the rate of cumulative wear to floors and vulnerable decorative surfaces close to the visitor route. At pinch-points overcrowding also leads to accidental damage. The same is true in gardens, where path edges are trampled into the lawn, and patches of wear occur around seasonally flowering plants and shrubs ('admiration points'). Dust research [Lloyd et al, 2003] has shown that daily deposition is proportional to total visitors, so cleaning needs to respond to the rate of dust coverage, whilst being aware that fragile surfaces, such as textiles and gilding, can be easily abraded by repetitive cleaning. Examining data on visitor capacity and flow in houses and gardens prompts property managers and their staff to consider how they might manage visitor dwell time in individual spaces and thus help prevent or mitigate damage by reducing overcrowding and risks of over-cleaning.

At The Vyne, normal visitor capacity is estimated to be 248 people in the house at any one time; a higher capacity is calculated for public holidays when visitor demand exceeds sustainable capacity, but when turning visitors away would be unpopular. This figure takes into account the physical impact of people on collections and interiors, visitor enjoyment, and the ability of each room guide to monitor the security of the room to which they are assigned. The average length of a visit to the house is 50 minutes, suggesting that daily capacity over 5 hours could be as great as 992 people. However, assessments of visitor flow indicate that not only smaller rooms, such as the South Bedroom and Strawberry Parlour, but also larger ones with dense displays, are frequently overcrowded, for example the Tapestry Room and Oak Gallery (Figure 3). Overcrowding occurs throughout hours of access from 11 am to 4 pm, even on quieter weekdays, causing damage to scagliola and gilt tables in the Oak Gallery (Figure 4), where visitor traffic also causes vibration and cracks in the Stone Gallery ceiling below (Table 3).

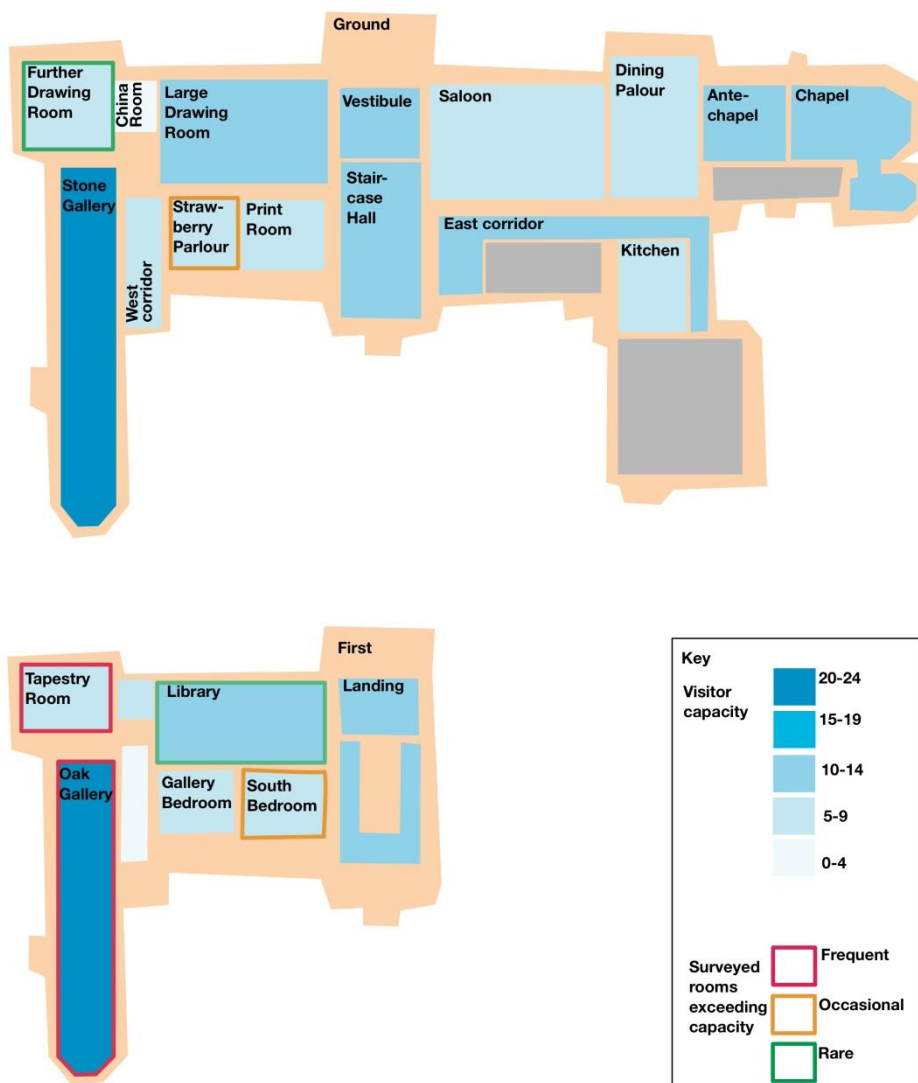


Figure 3: Floor plans for The Vyne, where the C4A assessment of visitor capacity shows which rooms become overcrowded.



Figure 4: The Oak Gallery at the Vyne ©National Trust Images/Andreas von Einsiedel

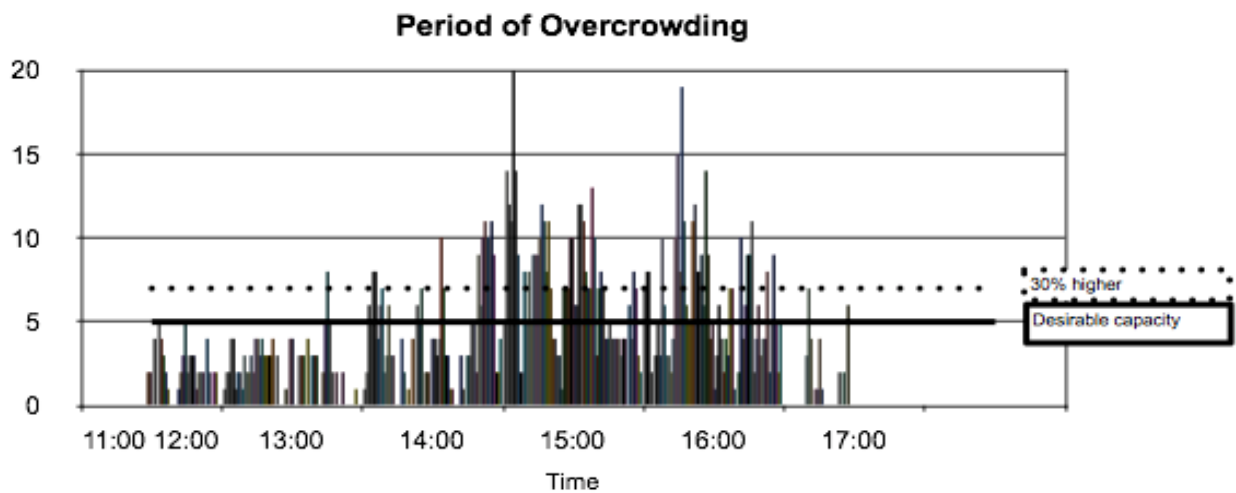


Table 3: Graph of visitor flow from a C4A worksheet. The amount of overcrowding is indicated by the peaks above the two thresholds; the higher capacity threshold applies only to public holidays when visitor demand exceeds the lower desirable and sustainable capacity, but when turning visitors away would be unpopular.

The data for dwell time, visitor capacity and flow between rooms suggests that more formal methods of controlling visitor flow could be adopted throughout the house, for example:

- putting surfaces and objects vulnerable to abrasion out of reach;
- using timed tickets to regulate entry to the house, and/or
- equipping room stewards to communicate directly with colleagues along the visitor route, for example to regulate entry to the Chapel.

The need for significantly larger preventive and remedial conservation budgets required to maintain and protect the showrooms during visitor access was also identified. However these controls, if imposed without reference to the story which the visitor route is trying to tell, might impair visitors' enjoyment of, and emotional engagement with, the spirit of place.

### Managing visitor flow without VED

In the absence of the systematic planning required by VED, piecemeal visitor management decisions taken to solve immediate problems without considering wider implications created an approach to the house never taken by historic visitors. Instead the route pours all our visitors, as soon as they arrive, into the most fragile part of the property: the house. The house has not one but two impressive fronts, to the North and South, but visitors are asked to approach from the East, seeing nothing of either of the principal façades, and to use the servants' entrance. Visitors pass the walled garden on their approach to the house and go through most of the formal gardens without giving them a second glance. This decision reflects a presumption that the house and collection are of greater value to visitors than the gardens and estate.

Although there are some benefits to using the servants' entrance - it is robust, with step-free access – visitors are deprived of a glimpse of either façade and made to feel like servants. This would not be a bad thing if there was an impressive 'below stairs' story to tell, but the service entrance does nothing to celebrate The Vyne's 'spirit of place'. If visitors were offered the historic approach to the house, they would have more opportunities to disperse and enjoy the woods, watch birds in the wetland reserve, or picnic while admiring distant views of the house across the lake (Figure 5).



*Figure 5: The preferred entrance route into the Vyne, giving views across the lake towards the North front (compare with Fig.1)  
©National Trust Images/Nick Daly*



## The challenge of mapping story to space

Like many writers on the art of story, Vogler [2007] makes it clear that engaging stories are constructed around a sequence of exciting peaks of “crisis”, interspersed with troughs of quieter reflection. That he writes for film and about screenwriting is surprisingly appropriate for heritage sites because, at many properties, visitors spend no more time engaging with the site than they would watching a film in a cinema.

But there is one crucial difference, the story in cinema is revealed in exactly the sequence that the director intended. National Trust surveys show that many places where visitors report deep emotional engagement with the story, and thus a more enjoyable visit, occur on guided tours whereas, where visitors flow freely, elements of the story may be encountered out of sequence. Although interpretation methods are a factor, the principal challenge is to map the story of the place to individual spaces so that, even if visitors do not follow the story in chronological order, they will still experience the “wow” moments separated by more reflective spaces. C4A can help map those spaces.

At The Vyne, most of the interpretation is provided in the house. Over the years layers of interpretation have accumulated, making the story confusing and less emotionally engaging than it might be. VED provides an opportunity to revisit the story, identifying a single main ‘theme’, the ‘spirit of place’ filtered through the lens of the target audience. Taking a cue from Rand [1993] three primary sub-themes have been drawn out of the main theme under which some key messages and stories are listed (Table 4). But how can this story be mapped to the spaces at The Vyne?

Main Theme	<b>Lose yourself in a little legend</b>		
Primary Themes	Did that really happen here?	The Courtier, the Connoisseur and the Country Squire	Treasure hidden in plain sight
Secondary and Tertiary Themes	Henry VIII, Jane Austen, World War II and the Lord of the Rings	Lord Sandys, the Courtier John Chute, the Connoisseur and Changing Fortunes	Woodlands, Wetlands and the Designed Landscape
Notes	Popular cultural icons that may (or may not!) have connections with the Vyne, and a great way to introduce all our visitor segments to the story.	Curious Minds and Live Life to the Full visitors can explore the development of the house and collection through these three contrasting lives	No-one has ever found all the playful surprises, wonders of nature, and creative treasures that the Vyne Estate has to offer. This theme is a great way for non-core audiences to fall in love with the Vyne.

Table 4: Themes and sub-themes at the Vyne

Using C4A data, the emotional peaks of the story can be synchronised with the “wow” spaces of greatest sensory stimulation, together with spaces for reflection around the more spectacular spaces, to ensure that people do not want or need to spend time with the story in the most fragile or cramped rooms. The data also encourages thought about interpretation methods so that, for example, time-consuming interactive media are not located on busy thoroughfares or at pinch-points but, instead, more appropriately in quieter spaces, at dead ends off the main visitor route, such as the Oak Gallery. C4A data demonstrates that, by increasing the attraction of this space, pressure on the adjacent Tapestry Room door could be relieved, although additional measures may be needed to prevent increased traffic causing further cracking of the ceiling plaster below. Also, to maintain good visitor flow, extending dwell time in the Oak Gallery should be followed by a short dwell time in the smaller South Bedroom next door (Figure 6).

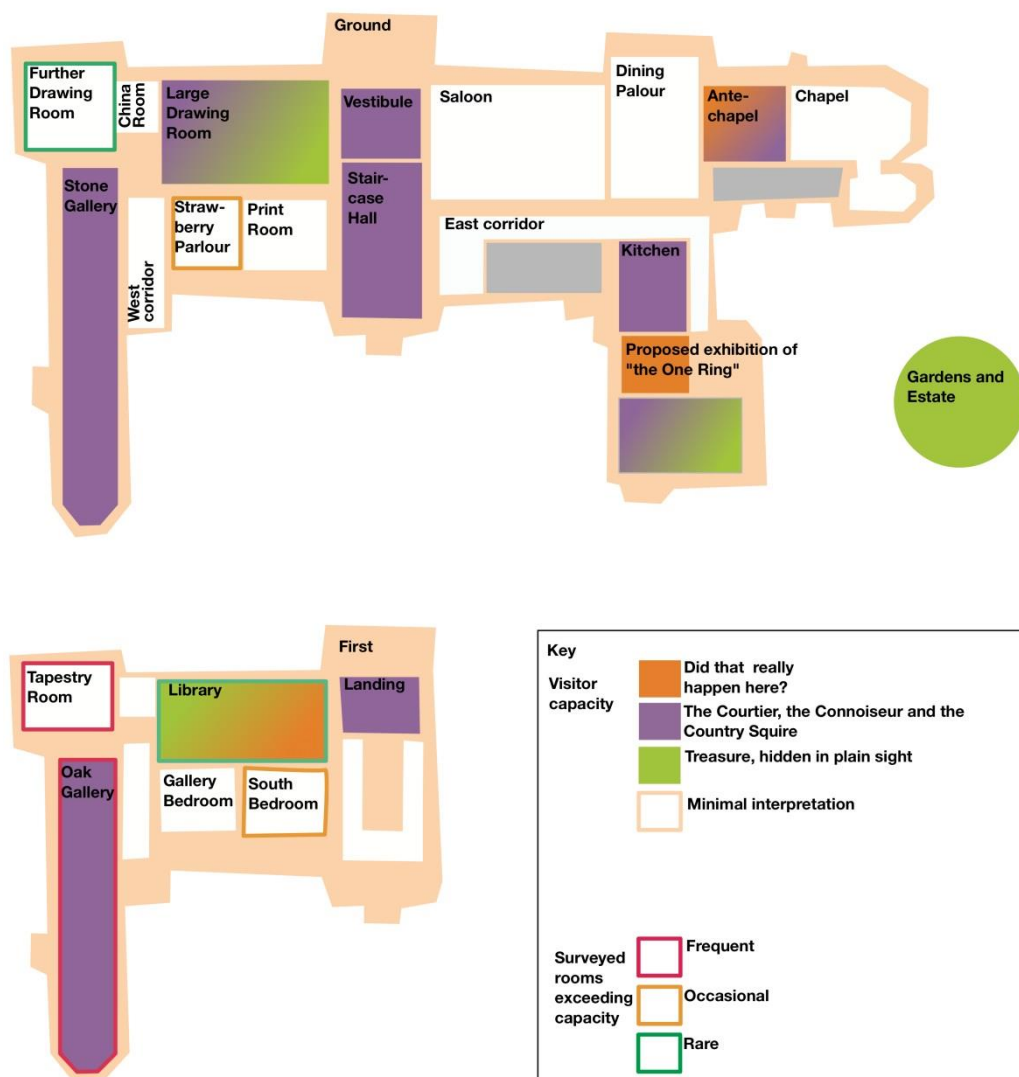


Figure 6: Mapping interpretive themes onto spaces, taking account of C4A capacities and story flow.

## Conclusion

To increase income whilst maintaining the condition of its properties to ensure a sustainable future, the National Trust must continually develop its business and respond to the needs of changing audiences. Currently, it aims to do this by creating a deep emotional connection between people and place through better storytelling, which engages visitors more profoundly with the place (or property), and develops longer term support for the Trust. A multidisciplinary approach can design the unfolding of the narrative in ways that avoid damaging the fabric of the place, by calibrating the way stories are told to the physical sensitivity of the spaces. So rather than trying to tell all a property's stories everywhere, complex stories which require prolonged dwell time can be told not in spectacular but sensitive spaces, but in adjacent robust rooms, either to prepare visitors - by telling a complex story in advance - or for visitors to reflect on what they have just seen. C4A data can help manage visitors' activities through spaces, to modulate interpretation to the constraints of the physical fabric, in tandem with the VED process influencing where and how people spend their time throughout the whole property. By focussing on a shared goal – how to manoeuvre visitors safely and enjoyably through space – two potentially conflicting objectives, conservation and access, can be successfully integrated to create a sustainable outcome.

## Acknowledgment:

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## Endnotes

<sup>1</sup> The National Trust's core purpose is summarised in *The National Trust Acts 1907-1971*, London: National Trust, 2005. <http://www.nationaltrust.org.uk/how-we-are-run/> (accessed 24 May 2013).

<sup>2</sup> A National Trust 'property' comprises the land, buildings, historically associated chattels and other assets. Entry tickets are sold at pay barriers usually located near a house and/or formal garden. To develop audiences and generate income, there is a desire to change the open season (April to October, with winter devoted to care and maintenance), to year round opening of some elements of a property.

<sup>3</sup> MOSAIC data classifies UK consumers in terms of location, demographics, lifestyles and behaviours <http://www.experian.co.uk/business-strategies/mosaic-uk.html> (accessed 24 May 2013).

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