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Reviewed Article:

People Want Quality and They are Willing to Pay for it

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The international and European notion of cultural and creative industries has not shown much appreciation of the potential of the cultural sector, especially the heritage sector. This may or may not be fair, but the perspective in the conclusions from KEA studies on cultural economy and creativity has been symptomatic for the European approach (KEA 2006; 2009). KEA concludes that the heritage sector primarily dedicates itself to preservation and does not have the competence to commercially develop the collections and knowledge about the collections. This would be better developed by somebody else.

> The main overall experience from Jamtli History Land in the summer 2012 is clear: visitors want to have a quality experience, and they are willing to pay for it.

I see this as a provocation for my own organisation, but also realize that the organization I head is unusual among Scandinavian peers. That insight forms the starting point of the following reflections on what we have experienced the last few years at Jamtli.

Jamtli is well known in Sweden as one of the largest regional museums in the country. It has the regional museum responsibilities and tasks for Jämtland County and celebrated its first 100 years in June 2012. Together with the regional museums in Lund (Skandia) and Visby (Gotland), Jamtli is also special among the regional museums and museums in Sweden as many years it has been very important as a tourist attraction. This means that thinking strategically about tourism is mandatory for the staff, the management and the board. This situation has meant that the three regional museums have invested in attracting tourists and that the ability to fulfil the tourism ambitions of local and regional authorities has made its mark on the whole atmosphere of the three organizations.

The Jamtli museum environment in Östersund includes an open-air museum and a large indoor museum. The later contains both permanent and temporary exhibitions and covers themes of archaeology, cultural history and art. Among the exhibited items is the famous Viking Age tapestry from Överhogdal. The open-air museum consists of agricultural and urban environments from the 17th century right up to the later part of the 20th century, which during the summer season are the settings for large scale living history with actors and animals. The environments are complemented with several historically inspired playgrounds for children.

In 1984 the museum introduced living history together with child and family oriented activities and playgrounds as the main pedagogical methods during the summer season and named that concept Jamtli History Land. That was an immense success for the visitors and soon Jamtli became a very important tourist attraction in the city of Östersund and the region of Jämtland during the summer. The choice of living history with role playing actors was well received by the family audience, and Jamtli soon became well known as a family museum with the ability to attract an audience not often seen in the museums. Jamtli, by becoming a major tourist attraction, also gained a role in the local and regional political thinking that other museums could only dream of. But in the first years after the introduction of living history many professionals in the museum world were critical of this popularization. It simply could not be serious! As time passed most people inside and outside of the sector developed respect for Jamtli's capacity to reach people, and in later years many museums in Sweden and Scandinavia also introduced living history, although not at the same scale as at Jamtli during the summer season.

Taking the next step in professionalizing the historical theme park strategy

From 2009 to 2012 Jamtli Foundation invested a large amount effort and money into developing the main summer season - Jamtli History Land - further with more attractions and activities and more staff than ever before. The new attractions includes a church replica from the 18th century, an art activity centre for children and a section on the 'modern society', which is a whole environment from the mid 1970s with houses and a playground developed on the basis of a famous children's television program. In addition to the expansion in the offered out door activities, Jamtli History Land also met the demand of many of the visitors for a high standard cultural experiences and now offers high quality, international, classical art exhibitions during the summer. With all this, and more, as the basis, Jamtli decided to be the first museum in Scandinavia to complement this development with other strategic initiatives.

Firstly we believe that Jamtli History Land is now of such a standard and quality that Jamtli has to take actions to meet a larger market. Therefore Jamtli has - as the first museum outside Stockholm in Sweden - invested in television advertising outside our own home market. For many years we knew that a large proportion of our tourists in the summer are based in the Stockholm area, and we want to expand our market there. Our television advertising has reached more than three million people during the winter and spring.

Theme park price policy

Secondly we decided that Jamtli History Land should adopt an entrance policy that matches the product and the expectations for such a product. This sounds natural and easy, but it is everything but that!

For five years the entrance fee for adults to Jamtli History Land has been 12 € (110 SEK). Before that it was 10 € (90 SEK) for six years. That price level is not unusual in the Swedish and Scandinavian museum world, but has been considered relatively high. The upper end price level of the comparable Scandinavian museum world looked like this for the summer season 2012:

	Adults	Children 1	Children 2
DENMARK			
Den gamle By, Århus Sagnlandet Lejre, Roskilde Hjerl Hedes frilandsmuseum Bork Vikingehavn, Skjern	**16,0 €** (120 DKR) **17,0 €** (130 DKR) **16,5 €** (125 DKR) **12,5 €** (90 DKR)	Free (age 0-18) Free (age 0-2) Free (age 0-18) Free (age 0-18)	65 DKR (3-11)
NORWAY			
Maihaugen, Lillehammer Norsk Folkemusuem, Oslo	**20,0 €** (150 NOK) **14,0 €** (100 NOK)	Free (age 0-5) Free (age 0-5)	75 NOK (6-15) 25 NOK (6-15)

Gamle Bergen Bymuseum	**9,5 €** (70 NOK)	Free (age 0-18)	
Sverresborg, Trondheim	**14,0 €**(100 NOK)	Free (age 0-5)	45 NOK (6-15)
SWEDEN			
Skansen, Stockholm	**17,0 €** (140 SEK)	Free (age 0-5)	60 Sek (6-15)
Fredriksdal, Helsingborg	**9,5 €** (80 SEK)	Free (age 0-18)	
Kulturen, Lund	**14,0 €** (120 SEK)	Free (age 0-18)	
Fornsalen,Visby	**12,0 €** (100 SEK)	Free (age 0-18)	
Kalmarläns museum	**9,5 €** (80 SEK)	Free (age 0-19)	
The 2011 admission fee for Jamtli	**12,0 €** (110 SEK)	Free (age 0-19)	

For several years Jamtli's price level has found its internal explanation in the argument that during the summer Jamtli offers so much, and the price level has for several years been accompanied by special offers: free entrance for children up to 18 years old, the ticket is valid two days in a row, the Jamtli ticket gives free entrance to our sister museum - Sverresborg - in Trondheim, Norway, retired and disabled people from the local community has free entrance and special activities on Tuesdays and quite cheap annual tickets for both individuals and families.

In the summer 2010 we knew that we would be investing quite a lot of money in Jamtli until 2012, and we decided to study price policies. In the summer 2010 we saw the following entrance price levels at comparable organizations (for current comparison you can here see the *2012* level also):

	Adults	Children
LOCAL		
Frösö Zoo (local zoo)	*(22 €)* **20 €** (180 SEK)	**10 €** (90 SEK)
Storsjöbadet (local water land)	*(30 €)* **30 €** (270 SEK)	**7 €** (60 SEK)
OPEN-AIR MUSEUMS INTERNATIONALLY		
Beamish (UK)	*(22,5 €)* **22 €** (200 SEK)	**13 €** (120 SEK)
Sovereign Hill (Australia)	*(38 €)* **29 €** (260 SEK)	**13 €** (120 SEK)
Colonial Williamsburg (USA)	*(39 €)* **29 €** (260 SEK)	**14 €** (130 SEK)
THEME AND LEISURE PARKS IN SWEDEN		
Astrid Lingrens värld (Fantasy Land for Children)	(*39 €)* **33 €** (295 SEK)	**19 €** (175 SEK)
Sommarland Leksand (Family Amusement Park)	*(32 €)* **29 €** (260 SEK)	Free
Skara Sommarland (Family Amusement Park)	*(33 €)* **31 €** (279 SEK)	Free
Gröna lund (Tivoli typ Amusement Park)	*(33 €)* **32 €** (289 SEK)	Free
Liseberg (Tivoli typ Amusement Park)	*(41,5 €)* **33 €** (295 SEK)	Free
Kolmården (Large zoo with park including safari)	*(44 €)* **34 €** (310 SEK)	**22 €** (200 SEK)

We see that the organizations with whom we compare ourselves in terms of offering high quality experiences for families for several hours has a price level of about 20-40 € for adults

and about half that price for children. The organisations who claim free entrance for children define children as younger than 6 years old or simply “shorter than one meter”.

The board discussed the issue during the autumn 2010 and winter 2010/2011 with the summer 2010 prices as reference. In February 2011 the board decided that a reasonable price level for adult entrance fee to Jamtli History Land should be 27 € (240 SEK) from the summer 2012 and that we should preserve the principle of free entrance for children (and even extend it from 18 to 19 years of age) and the other above mentioned special offers.

A price level for Jamtli History Land at 27 € for adults would, in comparison to international leisure and adventure parks, not be high in 2012, but in comparison with Scandinavian museums it would be quite out of the ordinary.

The primary reason why the board of Jamtli Foundation decided that Jamtli History Land should not be compared to other traditional museum experiences was the very convincing statistics that showed two very distinct characteristics. First of all, the visitors outside the summer season are primarily locals. About 80-85 percent lives in the local municipality, about 10 percent comes from the rest of the region and only 5-10 percent are tourists. During Jamtli History Land about 55-60 percent of the visitors are tourists. Secondly, we can see that outside the summer season about 25 percent of our visitors are children. Even though this is high among museums during the winter-time it is very different from the about 40 percent of the visitors who are children during the summer. These two characteristics demonstrate why Jamtli History Land should be treated by the board and the management as they would a theme park when it comes to marketing and price setting.

The process from decision to implementation

Being already known as one of the most expensive ‘museums’ to have a rise in admission fees of almost 120 percent, from 12 € to 27 €, demanded for preparation - politically - for the media, the locals, the local tourist industry and for the staff.

All these groups had to be addressed at the same time in parallel settings. Of course there were letters to the editors of the regional newspapers with protests, and the arguments were about either the problems created for low income families and retired people or the opponents argued that it must be mismanagement of Jamtli’s economy that made the entrance fee increase necessary. Each time we answered correctly and as polite as possible that we have very cheap annual tickets especially designed for the local population, who often have three or more visits to Jamtli per year. We have also explained that part of our mission is to live on tourism and therefore it should be the tourists pay what it costs to run Jamtli History Land, and we should not subsidise the tourists. It must also be better for the local community that we create jobs financed by tourists, instead of paying for the tourist’s experiences with us.

The same arguments were presented in many different terminologies and disguises to politicians at the County Council and the Municipal Council on more than one occasion. That was absolutely necessary, as we experienced how rumours were shaped and spread. The tourist industry in the region and in the municipality where Jamtli is located had no problem understanding our arguments, and we saw that our status, from the perspective of this group, has been strengthened. The hotels, restaurants and tourism information centres know we are depending on having a professional attitude towards tourism, and when we show that competence we get acknowledgement.

For the staff the way to implement the decision of the new entrance fee was another process. Three issues were discussed again and again. First of all, the staff had to believe in themselves and the product they offer to the public. It is a product of high quality, and it should be sold at a price that reflects the true value of it. Secondly, we knew that we would have reactions from visitors who would complain and would try their best to convince our staff that the new prices are too high to get a cheaper deal. Thirdly, the staff is also part of this process! We would all be more dependent on each other, and we would all need to feel the collective support of our colleagues.

At the management level we naturally also had to work out not only a plan B—if it all fails one way or another and people just do not come. We also had to think in pro-active terms and prepare to meet all critical thinking in a positive, friendly, understanding and correct way. And we had to realise that critique could come from everywhere!

At the management and board level, the policy concepts presented in the green paper on cultural and creative industries by the European Commission in 2010 was used in internal and external discussion. By creating a clear relation between the entrance income and the cost of the product offered through the right price level on the entrance fee we would be market sensitive but also secure the jobs involved in the production (European Commission 2010). Further studies in the literature showed that this liberal attitude towards commercialisation of culture did not conflict with national politics and were in line with the recommendations from council and sector work groups (OMC 2010 & Platform CCI 2009).

Reactions from the public and the visitors

The reactions have been threefold. First of all we have, of course, had some reactions in media from journalists searching for stories and from the public as letters to the editors. Journalists have tried to create a relation between the decision to have a higher entrance fee and the general economic situation for Jamtli as such during the period of international economic crisis. The board and management of Jamtli have met this journalism by offering all necessary financial information and this media coverage has had a normal impact on budget discussions between the foundation and the founders.

The public reaction through media have predominantly been of the kind that question the socio-economic aspect and a few from self appointed 'experts' claiming that this will be a disaster and shows the incompetence of the board, the management and even the political leadership of the founders of Jamtli—that being the county council and the municipal council.

Jamtli has answered each and every media reaction, even at times when it has been a natural thought, "Well, we have already answered that time and time again!" We think that this approach has been very important, as it demonstrates that the museum cares, and that we respect all opinions. Interestingly, these media reactions took place predominately before the actual summer season. As we came nearer to the season the reactions almost disappeared.

The second and most important form of reaction is from the visitors. Jamtli has a 31.7 percent rise in visitor numbers and has almost doubled the income from entrance fees for Jamtli History Land 2012 compared with 2011, and that year was by no means a bad year! The rise was 33.5 percent for adults and 31.1 percent for children. The only reduction is in the numbers of foreigners who visited Jamtli during the summer of 2012. There we can see a fall of almost 10 percent. That fall has not only been the case at Jamtli this summer, but the experience is shared with other attractions in Östersund and may primarily be explained by the change in exchange rate between the Swedish and Norwegian currency, which during 2012 has not favourable for the region in which Jamtli is located.

Of course we can critically add that Jamtli History Land 2012 has been favoured by perfect weather conditions as it has not been too hot or too rainy. The establishment of the new environment of the 1970s with living history, where Jamtli is first in Sweden and among the first in Scandinavia and Europe, do of course also help, and for the first time there has been television advertisement for Jamtli History Land outside the home region on a larger scale. How much or how little importance can be placed on these factors we don't know, and they are very difficult to estimate. It may be that the popularity of the new experiences at Jamtli combined with new advertisement and the almost perfect weather conditions has been so strong that it has more than balanced a negative effect on visitor numbers the higher entrance fee may have had. We do not know, but the 31.7 percent rise in visitor numbers seems to be about the expected (or better than expected) result of the new attractions, advertisement and good weather.

We can get some idea of the effect of the entrance fee on the visitors by the reactions from the entrance and reception area. The general visitor numbers vary from about 400 on a bad day with too much rain to about 1100 on a good day, and we have had from five to 20 people who have complained about the price level. At an average every other of the complainants have turned around and left Jamtli. This means that between 1 and 2 percent of the potential visitors showing up at Jamtli has complained and less than 1 percent has turned around and

left Jamtli. Is it few or is it many? This is difficult to answer, as there are at least two perspectives on the issue.

On the one hand, one percent either way in visitor numbers has only a minor impact on the numbers and on the entrance income for Jamtli.

On the other hand we may also respect that we have between 300 and 500 people after the season who absolutely not be good ambassadors for Jamtli. Unfortunately, we also know that almost all the people who turned around and left Jamtli are retired locals who chose to protest and leave, even though the reception staff informed about the free entrance for retired people on Tuesdays. Many complainants have taken these offers to heart, but not all.

From discussions with colleagues at comparable international open-air museums we can expect this reaction by locals for the first 2-3 years after the introduction of the international price level for theme parks. After that period of time the situation will be back to normal, and the new price policy will be accepted by the locals. Jamtli doubled the number of sold annual tickets from 2011 to 2012. There have been several campaigns for the annual ticket system since the autumn 2011, and the modest rise in price for these annual tickets (33 percent compared with the 120 percent rise for the standard admission fee for adults to Jamtli History Land) has been welcomed by many locals.

We do, of course, not know how many potential visitors chose not to come to Jamtli History Land and who made their choice because of the entrance fee level. But we do know that almost every third day we have had contact, by phone or mail, with people who have been critical of the new entrance policy. We have explained exactly as we did to the critical media reactions before the season, and we have experienced both people who understand the policy after we have explained and also people who do not understand or accept our explanation.

Financially we are very happy and see the new entrance policy as a great success after a 113 percent rise in entrance income during the History Land season, which means that we have financed twelve more professional staff during the season and even television advertisements on national television. We had expected a fall in commercial income from restaurant, café, hostel and museum shop but we have had a rise from about 9 percent to about 40 percent commercial turn over in the many different activities.

Impact on the visit and on the organization

When the visitor pays more for the visit he or she also expects ‘more’!

That ‘more’ is a complex entity as it combines the quality of the service, the experience in itself, the possible and real length of the visit and so on. The visitor also relates these

impressions to all over expectations in advance of the visit and for family or group visits both to the visitor herself and to the group.

The visitor survey done the summer 2012 at Jamtli History Land does not show any difference from earlier years in relation to visitor satisfaction. The visitors are happy with their stay and will recommend a visit to Jamtli to other people.

It looks like the length of the average stay has grown a little. That may be explained by the growth in the number of offers, not least through the latest establishing of the whole new 1970s display. As there is more to experience, it may take more time for a visitor get around. It may also be the simple case that the visitor wants to get the most for his or her money and therefore spent more time at Jamtli History Land.

For the staff behind Jamtli History Land as a product, we feel a change. From being sceptical of the decision on the new entrance fee level, to a period of acceptance and nervousness, we can now see a clear and self-conscious pride. The message to the staff has been that we must produce the best history land ever. After the first week of the season we have all been convinced by the reaction of the visitors that the 2012 version of the history land is really the best ever. The staff themselves express it as experiencing a clear atmosphere of collective support and interdependence and safety by someone being in charge at all times.

An Example to follow for culture and creative industries

The main overall experience from Jamtli History Land in the summer 2012 is clear: visitors want to have a quality experience, and they are willing to pay for it.

There are many detailed experiences from which Jamtli staff will learn, and the organization including board, management and staff will work with how to take into account these experiences in order to sustain the positive impact of this professionalization into the future.

There are also two very important, but somehow hidden, lessons from this that the Jamtli History Land experience delivers.

First of all, there is no reason why Jamtli History Land should be the only heritage-based product in Scandinavia for which visitors are willing to pay an amount comparable to other theme parks. This is especially true for the museums, such as those with a tradition of being a tourist attraction, that we may consider the peers of Jamtli. They are naturally able to make the same development and sustain a better financial situation on a commercial basis.

Secondly, it is interesting that The Land of Technique, also in Jämtland, has followed the entrance policy of Jamtli and in the summer 2012 had an entrance fee for adult of 16.5 € (150 SEK) and free admission for children up to 19 years. There have been no complaints what so ever, and the number of visitors has gone slightly up. The Land of Technique is located 15

kilometres South of Östersund and Jamtli and offers experiences for families with historical aeroplanes, cars and military from the 20th century. The Technique Land is by no means a large-scale museum and is no peer of Jamtli, but it was still the second most expensive heritage experience to visit in Sweden in the summer of 2012! That is very interesting as the growth in entrance income will be directly transformed in to more jobs and, thereby, regional development. We - Jamtli and The Technique Land management - will now encourage other heritage-based experiences to follow our trend and help create to more jobs in the cultural sector.

PHOTO BY: BRITT-MARIE SOHLSTRÖM

Link(s)
Jamtli official website

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