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***Jamtli is going crazy! Entrance fee up 120 percent!
- People want quality and they are willing to pay for it***

The international and European notion of Cultural and Creative Industries has so far not shown much appreciation of the potential of the cultural sector itself and especially the heritage sector. Maybe it is fair or maybe not 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 do not have the competence to commercially develop the collections and knowledge about the collections. That is better used and developed by somebody else.

I see this as a provocation for my own organization 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 as such in Sweden as it for quite many years has been very important as a tourist attraction that tourist strategic thinking is mandatory for the staff, the management and the board. This situation has had the impact on the three regional museums that they have invested in tourist attractiveness and that the ability to fulfil the tourism ambitions of local and regional authorities has set its clear mark on the whole atmosphere in 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 play grounds for children.

In 1984 the museum introduced living history together with children and family oriented actions 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 often not seen so much in the museums and also by the fact that Jamtli by the tourist attraction gained a role in the local and regional political thinking which 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 to this popularization. It simply could not be serious! As time passed most people inside and outside of the sector developed respect for Jamtlis capacity to reach people and in later years many museums in Sweden and Scandinavia has introduced living history themselves even though no where at the same scale as at Jamtli during the summer season – the history land.

Taking the next step in professionalizing the historical theme park strategy!

From 2009 to 2012 Jamtli Foundation has invested much effort and much money in 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 not least the “modern society” which is a whole environment from the mid 1970ies 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 has met the demand for high standard cultural experiences by part of the visitors and offers high quality international classical art temporary exhibitions during the summer. With al this and more as the basis Jamtli decided as the first museum in Scandinavia to complement this development by other strategic initiatives.

Firstly we believe that Jamtli History Land is now of such 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. Since many years we know 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 3 million people during the winter and spring.

Theme park prize policy

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

Since 5 years the entrance fee for adults to Jamtli History Land has been 12 € (110 SEK). Before that it was 10 € (90 SEK) for 6 years. That prize level is not unusual in the Swedish and Scandinavian museum world but has been considered relatively high. The upper end prize 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	16, 0 € (120 DKR)	Free (age 0-18)	
- Sagnlandet Lejre, Roskilde	17, 0 € (130 DKR)	Free (age 0-2)	65 DKR(3-11)
- Hjerl Hedes frilandsmuseum	16, 5 € (125 DKR)	Free (age 0-18)	
- Bork Vikingehavn, Skjern	12, 5 € (90 DKR)	Free (age 0-18)	
NORWAY:			
- Maihaugen, Lillehammer	20, 0 € (150 NOK)	Free (age 0-5)	75 NOK (6-15)
- Norsk Folkemusuem, Oslo	14, 0 € (100 NOK)	Free (age 0-5)	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 0-19)	
- Kalmar läns museum	9, 5 € (80 SEK)	Free (age 0-19)	
The <u>2011</u> admission fee for Jamtli	12, 0 € (110 SEK)	Free (age 0-19)	

At Jamtli this prize level has for several years found its internal explanation in the argument that during the summer “Jamtli offer so much” and the prize level has for several years been accompanied by some special offers: Free entrance for children up till 18 years, 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 prize policies. In the summer 2010 we saw the following entrance prize levels at comparable organizations (for current comparison you can here see the **2012** level also):

	Adult	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 prize level of about 20-40 € for adults and about half that prize for children. The organizations who claims free entrance for children defines 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 prizes as reference. In February 2011 the board decided that a reasonable prize 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 up till 18 to up till 19 years of age. We should even preserve the other above mentioned special offers.

A prize 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 league.

The primary reason why the board of Jamtli Foundation could decide that Jamtli History Land should not be compared with other traditional museum experiences was the very convincing statistics which showed two very distinct characteristics: First of all the visitors outside the summer season is 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 demonstrates why Jamtli History Land should be treated by the board and the management with theme park attributes such as marketing and price setting.

The process from decision to implementation

Being known already as one of the most expensive “museums” to visit a rise in admission fee with 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 has been letters to the editors of the regional news papers with protests and the arguments have all the time been about either the problems created for low income families and retired people or the opponents have argued that it must be mismanagement of Jamtlis economy which make the entrance fee increase necessary. Every time we have 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 should the tourists pay what it cost to run Jamtli History Land and we should not subsidise the tourists. It must be better for the local community that we create jobs financed by tourists in stead of actually paying for the tourist’s experiences with us.

The same arguments were in many different terminologies and disguises presented for politicians at the County Council and the Municipal Council at 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 problems in understanding our arguments and we have actually experiences how our status from the perspective of this branch has been strengthened. The hotels, restaurants, 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 prize which reflects the true value of it. Secondly we of course knew that we will have reactions from visitors who will complain and will try their best to convince our staff that the new prizes are to high and they will try by all means to get a cheaper deal. Thirdly the staff is in this process together! We will all be more dependent on each other and we will all need to feel the collective support of our colleagues.

At 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 al critical thinking in a positive, friendly, understanding and correct way. And that critique could come from everywhere!

At management and board level the policy thinking 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 about 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 have of course experienced that 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 which 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 that “Well, we have already answered that one 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 were predominantly placed before the actual summer season. As we came nearer to the season the reactions almost disappeared.

The second and most important form of reactions are 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 the summer 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 developed in a not favourable direction 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 much rain. The establishment of the new environment of the 1970ies 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 which can be explained by these factors we don't know and they are anyhow very difficult to estimate. It may be so, 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 by the new relative high entrance fee. We do not know, but the 31,7 percent rise in visitor numbers seems to be about the expected level or even more than what may have been expecting only by the new attractions, advertisement and good weather.

We can get some idea about the effect of the entrance fee on the visitors by the reactions experienced in 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 5 to 20 people who have complained about the price level. At an average every second of the complainants have turned around and left Jamtli and not pursued with their visit. 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? It 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 will 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 their hearts but not all.

From discussions with colleagues at comparable international open air museums we have information that we shall expect this reaction by locals the first 2-3 years after the introduction of 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 also 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 for these annual tickets with 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 who chose not to come to Jamtli History Land and who made their choice because of the entrance fee level. But we do know that we almost every third day have had contact by phone or mail with people who have been critical to the new entrance policy. We have explained exactly as we did before the season to the critical media reactions and we have experienced both people who understand the policy after we have explained and of course also people who do not understand or accept our explanations.

Financially we are of course very happy and see the new entrance policy as a great success after a 113 percent rise entrance income during the History Land season, which means that we have financed 12 more professional staff during the season and even television advertisement 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 they stay and will recommend a visit to Jamtli for 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 environment from the 1970ies. As there is more to experience it may take more time for a visitor go 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 because it has grown.

For the staff behind Jamtli History Land as a product we feel a change. From being sceptical to 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 they experience a clear atmosphere of collective support and interdependence and a safety by there al the time being someone in charge.

An Example to follow for Culture and Creative Industries

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

There are lots of 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 the professionalization in the future.

There are also two very important but somehow hidden lessons from this which 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 which we may consider the peers of Jamtli with tradition for tourist attraction. They are naturally able to make the same development and by on commercial basis sustain a better financial situation.

Secondly it is likewise interesting that in the shadow of Jamtli History Land we have in Jämtland region experienced that The Land of Technique has followed the entrance policy of Jamtli and in the summer 2012 had an entrance fee for adult on 16,5 € (150 SEK) and free admission for children up to 19 years. There have been no complains 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 is anyway in the summer 2012 the second most expensive heritage experience to visit in Sweden! 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 – now will stimulate other heritage based experiences to follow our trend and thereby help create more jobs in the cultural sector.

- European Commission (2010) *“Green Paper - Unlocking the potential of cultural and creative industries”*, Brussels COM (2010) 183
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