

# Increasing public engagement with historic heritage

A social marketing approach

SCIENCE FOR CONSERVATION 294



Department of Conservation  
*Te Papa Atawhai*

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Louise Thornley and Andrew Waa

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### ABSTRACT

This project was undertaken to help meet the Department of Conservation's (DOC's) goal of increasing the value of historic heritage among the New Zealand public. It includes the development of goals, objectives and advice for designing and implementing a social marketing intervention (the application of commercial marketing techniques to a social issue). Social marketing is used to influence behavioural change through interventions such as media campaigns and/or provision of information or services. To develop the advice, a literature review was undertaken, programme planning processes were applied, and key DOC staff were consulted through workshops. The literature review showed that limited research of relevance to New Zealand has been undertaken to date. However, there are indications that New Zealanders tend to lack engagement with historic heritage, despite viewing it as important. Therefore, a two-tiered approach for delivering the social marketing intervention is recommended. First, community planning approaches would be used to engage communities. Individuals in those communities would then be supported to become better engaged with their historic heritage. Achievement of the recommended goal of 'increasing engagement with historic heritage' can be measured through changes in specific behaviours that reflect five key elements of heritage value: historic, cultural, physical, aesthetic and social. It is suggested that a social marketing intervention is piloted in a specific geographic community to assess its usefulness using a community-based approach in a particular context.

Keywords: historic heritage, cultural heritage, social marketing, value, public perceptions

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# 1. Introduction

The overarching purpose of the Department of Conservation (DOC) is to ‘increase the value that New Zealanders attribute to conservation’ (DOC 2008). Conservation includes both natural and historic heritage. In 2007, DOC initiated a project to trial the potential applicability of social marketing to its work in the conservation of historic heritage sites in New Zealand. Social marketing applies commercial marketing techniques to a social issue. It is used to influence behavioural change through a variety of interventions, such as media campaigns and/or provision of information or services. The aim of this project was identified as increasing the value of historic heritage among the New Zealand public. The objectives of the project were to:

- Determine the suitability of social marketing as an approach to increase the value New Zealanders place in historic heritage and the conservation of heritage
- Provide advice on goals and objectives for a social marketing intervention to improve how people value historic heritage

This report gives an overview of the process used to develop the goals and objectives for a proposed social marketing intervention, and provides advice on how the intervention should be implemented.

The project was innovative and challenging, as it was the first known application of social marketing in the area of historic heritage, both in New Zealand and internationally. An iterative process was used that included regular consultations with DOC staff members, who formed a working group and provided input into the development of the goals and objectives for the social marketing intervention.

## 1.1 INTRODUCTION TO SOCIAL MARKETING

Social marketing has been defined as the application of commercial marketing techniques to influence voluntary behavioural change for the improvement of personal and societal welfare (Stead et al. 2007). Whereas commercial marketing aims to sell products or services for financial gain, social marketing aims to sell social goods for social gain. Social gains can include improvements in community functioning, the environment and health. Individuals may receive personal benefit from these social goods; however, the emphasis is on overall benefits at a community and societal level. For example, young people may be encouraged to rebel against the tobacco industry through avoiding or stopping tobacco use as a sign of independence (individual good). However, if this intervention was successful, the ‘social good’ would be improved health status in the community through fewer people smoking.

One of the challenges of social marketing is that the products are often less tangible than for commercial marketing, and bringing about behavioural change can be more complex. A further challenge is that the product may represent a behavioural change to which people have some resistance, such as giving up a pleasurable habit, and there may not be immediate or apparent benefits to

making the change (McDermott et al. 2005). In addition, the longer term changes that can result from a social marketing intervention may take years to occur.

To assist in defining social marketing more precisely, Andreasen (2002) suggested six criteria for social marketing interventions:

- Identify and address specific *behavioural goals*
- Use *consumer research* to understand the target audience
- Consider ways of *segmenting* the population and tailoring the intervention appropriately
- Consider what would *motivate* people to change
- Use a combination of channels and activities that make up the *marketing mix*
- Address *competition* or barriers to behavioural change

As part of *segmenting* the population, it is important to assess how different groups relate to the problem or issue that is the focus of the intervention, as sometimes these groups may perceive the product quite differently. For example, families may see a historic heritage site as an opportunity to socialise, whereas others may see a heritage site as an opportunity to get fit through running, tramping or cycling. A further important distinction is between the *target* and *intervention groups*. Generally, the target group is people whose behaviour is the ultimate focus for change, e.g. young people with a lack of interest in historic heritage. The intervention group is people who have direct influence over the target group. As the term suggests, intervention groups are the people most likely to make behavioural change happen. Intervention groups can include members of the target groups themselves or other members of the community; e.g. parents, teachers and community leaders may be involved in increasing engagement of young people with historic heritage (McDermott et al. 2005).

The *marketing mix* includes making decisions about the four *Ps* of social marketing—product, price, place and promotion. The product may be something tangible, such as condoms or a medical screening examination, or something intangible, such as environmental protection. Social marketers also distinguish between the actual product and the product as perceived by the consumer. In the case of historic heritage, the actual product may be a visit to a heritage site, whereas the perceived product may be the opportunity to spend time with family.

Social marketing is a planned approach to address an identified problem or issue, rather than an end in itself. Authors in the field emphasise that social marketing is not simply social advertising. Social marketing approaches may or may not make use of communications strategies, depending on the problem and the needs of the people they are trying to influence (Stead et al. 2007). Central to social marketing is careful consideration of the issue that the intervention will address and strategies for the best methods of addressing this issue.

A key factor in the planning process is the need to understand how people can be motivated to change their behaviour. This understanding can be gained through consumer research and knowledge of theories of behavioural change. One such important theory is *exchange theory*, which suggests that in changing behaviour, people are effectively exchanging one behaviour for another. From the individual perspective, to make and sustain a new behaviour the benefits of the new behaviour must outweigh those of the previous behaviour.



Therefore, the challenge for social marketing interventions is to maximise the perceived benefits and minimise the perceived costs of a new behaviour, as seen by the target and intervention groups. A fuller description of theories and approaches commonly applied within social marketing interventions is given in Appendix 1.

## 1.2 SCOPE OF THIS REPORT

This report presents a project undertaken to propose a social marketing intervention to increase the value of historic heritage among the New Zealand public. It describes the development of goals, objectives and advice on strategies for designing and implementing a social marketing intervention.

The study involved a literature review, several workshops with DOC staff and a programme planning process. These are described in section 2. The findings from the literature review are set out separately (section 3), while the findings from the workshops are included throughout the report, as these were undertaken regularly to seek input from DOC staff on the development of the project.

Prior to undertaking the literature review, it was necessary to define the central issue that the proposed social marketing intervention would address. However, this in itself proved difficult, as the definition of the central issue needed to be reworked and clarified several times through workshops with the DOC working group established for this project. Although the term *value* is currently used extensively within DOC in relation to heritage and conservation, it was not clear what the term meant in practice. Since social marketing generally focuses on bringing about behavioural changes among groups of people, this needed to be defined to determine what specific behaviours may be associated with valuing historic heritage. Section 3.1 outlines the process used to understand and define the central issue for the project.

As a result of several workshops and meetings, the central issue was defined as 'an apparent undervaluing of historic heritage by the New Zealand public'. Therefore, section 3.2 appraises how the New Zealand public perceives, values and experiences historic heritage.

The development of goals and objectives for a proposed social marketing intervention is outlined in section 4, and more information about these and implementation of the social marketing intervention are provided in section 5.

A Glossary of terms used in this report is provided at the end of the report. Appendices include a summary of relevant theories and lessons from other social marketing interventions, and definitions of historic heritage.

## 2. Approach

The process used to develop the goals and objectives of the proposed social marketing intervention included:

- Undertaking a brief review of the literature on values and perceptions of historic heritage
- Reviewing relevant behavioural and social theories and models
- Engaging with and consulting key DOC staff through:
  - Establishing a working group
  - Personal communications
  - Meetings
  - Workshops
- Synthesising literature findings and stakeholder input to inform the programme planning processes

Key methods used in this process are described below.

### 2.1 LITERATURE REVIEW

A literature review was undertaken to answer three main questions:

1. What is meant by ‘valuing historic heritage’?
2. What are the heritage perceptions, values and experiences of the New Zealand public?
3. Which factors motivate or inhibit people in terms of engaging with heritage?

The review drew largely on recent publications (from the year 2000 onwards), and included internal documents, academic papers, reports and website material from academic and grey (unpublished) literature. The emphasis was on New Zealand material, but international material was also included where relevant, especially from comparable countries such as the USA, Canada and Australia<sup>1</sup>.

Recent academic literature was sourced using:

- Google Scholar
- Social Sciences Citation Index via Web of Knowledge
- Index New Zealand
- Selected online journals

Reference lists in the main literature were also scanned for relevant topics. Where online journals were accessed, a ‘related articles’ search function was used where available. For topic areas with little relevant academic literature, the grey literature search was crucial in generating sufficient material and breadth of evidence for the review.

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<sup>1</sup> Countries such as the USA, Canada and Australia were considered comparable to New Zealand as they are developed countries with a history of colonisation of indigenous peoples.

In addition, DOC staff were consulted and websites were searched. Key websites included those of the Department of Conservation, Historic Places Trust, the Ministry for Culture and Heritage, International Council on Monuments and Sites (ICOMOS), Auckland Regional Council, the Ministry for the Environment, the Ministry of Tourism, and the Ministry for Social Development.

The search strategy used combinations of the following keywords:

*Historic heritage, cultural heritage, heritage sites, historic sites, public perceptions, attitudes, awareness, understanding, engagement, action, volunteering, volunteers, national identity, social capital*

Searching was undertaken between January and March 2008.

### 2.1.1 Selection of articles for inclusion

Once the initial search was completed, a three-stage process was used to select references for inclusion in the review:

1. Reference titles and abstracts (where possible) were briefly scanned and included or excluded as appropriate, based on apparent relevance and the inclusion/exclusion criteria outlined in Table 1.
2. The selected abstracts were appraised in more detail and papers were included or excluded on the basis of their relevance.
3. Full text versions were then retrieved for the majority of remaining papers and reports, although in several instances only the abstract was reviewed as the full text could not be obtained. These were assessed for relevance and further cuts were made where necessary.

All selected papers were then appraised and summarised. A total of 30 papers and/or abstracts were included.

TABLE 1. CRITERIA FOR THE INCLUSION AND EXCLUSION OF ARTICLES IN THE LITERATURE REVIEW.

INCLUSION CRITERIA	EXCLUSION CRITERIA
<ul style="list-style-type: none"> <li>• Evidence on the state of historic heritage in New Zealand, and attitudes, perceptions and values of the public towards heritage in New Zealand and other comparable countries.</li> <li>• Relevant research from 1990 to the present, with a focus on recent research from 2000.</li> <li>• Quantitative and qualitative work.</li> <li>• Empirical and descriptive material, such as guidelines and summary reports.</li> <li>• Research on museum visitors, as findings may be relevant to visitors of heritage sites.</li> </ul>	<ul style="list-style-type: none"> <li>• Research from countries not comparable to New Zealand, such as developing countries.</li> <li>• Opinion and editorial work.</li> </ul>

## 2.2 WORKSHOPS

Four workshops were held with key DOC staff over the course of the project. Staff members were from various teams within the National Office with expertise in historic heritage, science and research, interpretation, training, and marketing. These workshops were used to discuss and refine the central issue that the project intended to address, and to gain feedback on each stage of developing the goals and objectives.

## 2.3 PROGRAMME PLANNING

The purpose of the project was to provide advice on goals and objectives for a social marketing intervention to improve how people value historic heritage. To achieve this, a planning framework that is commonly used in health promotion was applied (Hawe et al. 1990). An overview of the planning framework is given below. We have also outlined the development of strategy objectives and strategies, even though this is beyond the scope of the present project, to provide a context for how the goals and objectives could be used.

### 2.3.1 Intervention plan definition

An intervention plan (also known as a programme plan) is the process of articulating what an intervention will attempt to achieve, why it is being undertaken and how it will be undertaken (Hawe et al. 1990). The planning process identifies the main issue, its causes and the most effective actions to address the issue.

### 2.3.2 Components of an intervention plan

An intervention plan is generally made up of a goal, objectives, strategy objectives and strategies (Hawe et al. 1990). It should be noted that alternative terms are sometimes used to define a plan's elements; however, the general structure is usually the same.

#### ***Goal***

The goal of a programme or intervention is usually the overarching issue or problem that an intervention has been designed to address. A goal is characterised by being longer term, generally not achievable as a result of the intervention alone and something that results in a physical change in the state of some object. A single organisation or intervention is unlikely to achieve the goal; instead, any changes in relation to the goal would be the result of the collective efforts of organisations and society in general.

The purpose of a goal is to provide clear and ongoing direction for an intervention. A goal that is readily achieved would result in the intervention quickly becoming directionless. A goal should not be confused with a *vision*, which is a qualitative description of what an intervention is working towards in terms of philosophical underpinnings that should remain intact throughout the process of implementing an intervention.

## **Objectives**

Objectives are clear and concise statements about what an intervention will actually aim to achieve in relation to its goal. Ideal objectives are often referred to as SMART:

*Specific:* Specify what the programme will achieve

*Measurable:* Able to measure whether the objectives are being met

*Achievable:* Are achievable and attainable

*Realistic:* Take into account available resources and timeframes

*Time:* Include a specific timeframe for achievement

In addition, objectives should generally refer to actual changes in behaviours or settings. Sometimes, objectives are stated in relation to changes in attitudes; however, care should be taken if an intermediary (behavioural) step is still required before a goal is achieved (e.g. raising awareness of historic heritage can be seen as an intermediary step to increasing active engagement in historic heritage).

Generally, objectives are identified through a systematic assessment of evidence, theory and experience to identify what causes the central issue (restated as the goal) to occur. Key influences or risk and protective factors are identified, which then become the immediate focus for a programme. Evidence is used to identify known risk factors that are causally associated with the issue. For example, risk factors for disengagement with historic heritage may be other competing behaviours, such as employment, taking care of the family or community work. Theory is then used to assess how known risk factors are causally associated with the central issue and to identify any areas where there is no available evidence but theory suggests there may be an influencing factor. Both theory and evidence are used to develop an explanatory model that explains the processes through which an issue is caused. Finally, experience is used to translate these known and theoretical risk factors into practical and SMART objectives.

A single objective may also have a number of sub-objectives that contribute to it. For example, as a pre-requisite for engaging families in historic heritage, parents may need to first know about the sites that are easily accessible to them and the potential they present for providing family-oriented social opportunities.

As well as setting a clear direction for an intervention, goals and objectives are also essential for evaluations that assess the impacts of an intervention. Objectives are typically used to identify key programme 'success measures' and are, therefore, a focus of impact evaluations.

### ***Strategy objectives***

Strategy objectives sit underneath particular objectives and refer to a set of activities undertaken to achieve each specific objective. As discussed above, these objectives refer to a change in the behaviour of an individual or environment. The strategy objectives should describe how this change will occur. To do this requires an understanding of how change can occur and the process for achieving this. This is sometimes described as an intervention's theory of change.

At a practical level, strategy objectives can be viewed as *projects*. Using a project planning approach, strategy objectives can be implemented as projects during a financial year (or longer) and can be described in an organisation's Statement of Intent and Annual Plans.

### ***Strategies***

Strategies are those discrete activities (or tasks) that need to be undertaken to complete a strategy objective. The majority of an intervention's resources are used to deliver its strategies. However, these should only be determined once the intervention's goals, objectives and strategy objectives have been determined.

## **2.3.3 Principles of the intervention planning framework**

The principles underpinning the intervention planning framework are:

- The intervention focuses on a single overarching issue or problem
- There is a clear demarcation between what the intervention aims to achieve and the strategies that will be used to achieve it
- Target and intervention groups are clearly defined
- The processes that have led to the problem or issue occurring are understood (or at least hypothesised)

In addition, while the intervention should focus on a single overarching issue or problem, consideration should also be given to indirect outcomes of the intervention, both positive and negative.

In general, the principles underpinning this framework are transferable across planning methods.

## 3. Findings from the literature review

The main findings from the literature review are set out below according to the objectives of the review:

1. Understanding the issue: What is meant by *valuing* historic heritage?
2. Heritage perceptions, values and experiences: What are these in New Zealand?
3. Experiencing historic heritage: Which factors motivate or inhibit people in terms of engaging with heritage?

### 3.1 UNDERSTANDING THE ISSUE

The aim of this section is to increase understanding of the central issue, which is an apparent undervaluing of historic heritage by the New Zealand public. Key definitions of historic heritage, Maori perspectives on historic heritage, what is meant by valuing historic heritage and the conservation of historic heritage in New Zealand are discussed.

#### 3.1.1 Key definitions of historic heritage

As part of defining historic heritage, it is useful to refer to dictionary definitions of the component terms. The Oxford Dictionary (Thompson 1992) defines *historic* as:

*1 Famous or important in history or potentially so. 2 Used to narrate past events.*

and *heritage* as:

*1 What is or may be inherited. 2 Inherited circumstances, benefits etc. 3 A nation's historic buildings, monuments, countryside, etc., especially when regarded as worthy of preservation.*

New Zealand has a number of similar legislative definitions for historic heritage and associated terms. Key pieces of legislation that define historic heritage include the Conservation Act 1987, Historic Places Act 1993 and the Resource Management Amendment Act 2003. In general, these define historic heritage as being embodied in natural and physical resources that contribute to understandings of, and appreciation for, New Zealand's history and cultures. In terms of specific historic places, historic heritage is described in relation to land, buildings and/or structures.

The Resource Management Amendment Act 2003 describes a number of characteristics that individually or collectively result in an object or site qualifying as having historic heritage value. These characteristics include archaeological, architectural, cultural, historic, scientific and/or technological value.

Using these definitions, examples of objects or sites with historic heritage value in New Zealand include:

- Historic sites, structures, places and areas
- Archaeological sites
- Sites of significance to Maori, including wahi tapu
- Surroundings associated with natural and physical resources
- Place names, objects, artefacts, and natural features of cultural and historical significance
- Historical associations, people and institutions

The Conservation and Historic Places Acts are focused on conserving the natural environment and historic places. These two Acts describe the importance of conservation as a means of maintaining the intrinsic value of historic heritage sites for the appreciation and enjoyment of the general public, and ensuring their preservation for future generations. Further details on the legislative definitions of historic heritage are provided in Appendix 2.

### **3.1.2 Maori perspectives on historic heritage**

A number of legislative definitions of historic heritage include references to sites of significance to Maori. Part of the significance of these sites can be attributed to Maori being the indigenous inhabitants of New Zealand and partners under the Treaty of Waitangi. The Charter for the Conservation of Places of Cultural Heritage Value for the New Zealand branch of ICOMOS states that the indigenous cultural heritage of Maori relates to family, local and tribal groups, and associations; is inseparable from identity and wellbeing; and has particular cultural meanings (ICOMOS New Zealand 1992). The Charter emphasises the Treaty of Waitangi as the historical basis for indigenous guardianship of cultural heritage. The Treaty 'recognises the indigenous people as exercising responsibility for their treasures, monuments and sacred places' (ICOMOS New Zealand 1992: Section 2, paragraph 2). This means that the heritage of Maori is considered as a special case where decision-making should rest with indigenous people at iwi, hapu and whanau levels (ICOMOS 2004).

Department of Conservation strategic documents also make specific reference to Maori heritage and engaging with Maori within a Treaty framework. For example, the Tongariro/Taupo Conservation Management Strategy 2002-2012 describes the use of the Treaty of Waitangi as a framework for working with Maori on conservation issues (Green et al. 2002). This framework is based on principles derived from the Treaty (Table 2).



TABLE 2. FRAMEWORK FOR WORKING WITH MAORI AS OUTLINED IN THE TONGARIRO/TAUPO CONSERVATION MANAGEMENT STRATEGY (GREEN ET AL. 2002).

PRINCIPLE (MAORI)	ENGLISH TRANSLATION	APPLICATION
1. Kawanatanga	The principle of government	The authority to make laws for the good order and security of the country
2. Tino rangatiratanga	The principle of traditional iwi authority	The right of Maori to exercise traditional authority and control over their land, resources and taonga
3. Exclusive and undisturbed	The principle of exclusive and undisturbed	The right of Maori to exclusive and undisturbed possession of their land, forests, estates and fisheries
4. Oritetanga	The principle of equality	The right of Maori and non-Maori alike to equality of treatment and the privileges and responsibilities of citizenship
5. Kaitiakitanga	The principle of guardianship	The right of Maori to undertake their duty of kaitiakitanga over their land and resources and taonga of significance to them
6. Whakawhanaungatanga	The principle of partnership	The Treaty provides for a partnership between Maori and the Crown, which requires the parties to afford each other reasonable cooperation and utmost good faith, in accordance with their Treaty obligations
7. Tautiaki ngangahau	The principle of active protection	The duty of the Crown to ensure the active protection of taonga for as long as Maori so wish it
8. He here kia mohio	The principle of informed decision-making	The duty of the Crown to make informed decisions
9. Whakatika i te mea he	The principle of redress	The duty of the Crown to remedy past breaches of the Treaty and to prevent further breaches

### 3.1.3 What is meant by valuing historic heritage?

The New Zealand Charter for the Conservation of Places of Cultural Heritage Value (ICOMOS New Zealand 1992: Section 1) states that heritage places:

- Have lasting values and can be appreciated in their own right
- Teach us about the past and the culture of those who came before us
- Provide the context for community identity, whereby people relate to the land and to those who have gone before
- Provide variety and contrast in the modern world, and a measure against which we can compare the achievements of today
- Provide visible evidence of the continuity between past, present and future

Documents from government heritage agencies and regional councils indicate that historic heritage is important for a range of reasons, including its contribution to identity and wellbeing at both individual and collective levels. Heritage helps to form individual identity and provide a sense of place, as well as enriching quality of life. In an Australian study on the value of historic heritage, 79% of participants agreed that their life was better for having the opportunity to see or visit heritage sites or places (Allen Consulting Group 2005). At a community level, historic heritage can be seen as contributing to collective identities and to social cohesion. Historic heritage is also important for economic wellbeing, for instance through cultural tourism (Colmar Brunton 2003).

The Australian study (Allen Consulting Group 2005) explored various meanings of *value* in the context of historic heritage. The authors argued that the concept of value is central to historic heritage, as it denotes worth: if historic heritage sites are not seen to have any worth then it is unlikely that effort will be put into their conservation:

*Value has always been the reason underlying heritage conservation. It is self evident that no society makes an effort to conserve what it does not value.* (Torre & Mason 2002, cited in Allen Consulting Group 2005: 3)

The report's authors noted that heritage is essentially a collective phenomenon with a multiplicity of values and meanings. A particular heritage building or site may be valued differently depending on individual and group perspectives. These values can include social, political, aesthetic, spiritual, educational and economic influences. The authors proposed that the value placed on historic heritage can be categorised according to three perspectives:

- Individual perceptions
- Social interaction
- Intrinsic value

### ***Individual perceptions***

Individual perceptions were described by the Allen Consulting Group (2005) in the context of *economic value*. However, the authors also noted that there is an increasing acceptance that the traditional distinctions made between different claimed forms of value (e.g. economic value, heritage value, social value, environmental value, cultural value) can be measured in both financial and broader social terms, and it is not useful to take each form of value in isolation.

In terms of individual value, heritage values can be assessed according to an individual's willingness to pay to protect heritage or to accept compensation for its loss. The authors suggested that historic heritage sites should not be seen as providing a *good* or *service* in isolation, but rather be seen as providing the attributes for a number of goods; for example, a site may be used for various purposes, such as for work, recreation and socialising. Moreover, they suggested that in order to gain satisfaction from a heritage site, individuals do not necessarily have to visit or access a site; benefits from heritage can be gained from knowledge of its presence in terms of providing a sense of place or the possibility of future opportunities to visit it.

The Allen Consulting Group (2005) report describes different individual perspectives on value as 'categories of value'. This model separates value into *use* and *non-use* values. Use values are further separated into *direct* values (e.g. valuing as a source of income, residence and/or recreation) and *indirect* values (e.g. valuing for aesthetic qualities, community image and/or social interaction). Non-use values are divided into *option* (preserving as an option for future use), *existence* (e.g. contribution to identity and uniqueness) and *bequest* (providing a historical legacy for future generations).

### **Social interaction**

The value of social interaction is described in the Australian heritage report (Allen Consulting Group 2005) as contributing to the social capital of a community. A report for Statistics New Zealand describes social capital as:

*... the social resource that is embodied in the relations between people. It resides and stems from the contact, communication, sharing, co-operation and trust that are inherent in ongoing relationships. It is described as "capital" as it can be accumulated over time and then drawn on in the future for use in achieving certain goals. Social capital is a collective resource rather than one accruing to an individual.*

(Spellerberg 2001: 10)

The Australian report builds on this definition by referring to institutions, relationships, attitudes and values as governing the interaction among people, which ultimately contributes to a collection of individuals forming a society. Using *community* as a reference point, the authors suggested that dimensions of social and cultural values in relation to historic heritage include:

- Contribution towards social stability and cohesion
- Aesthetic value (related to architectural appreciation and artistic creativity)
- Spiritual significance that facilitates a sense of identity at the community level
- Symbolic power of sites to create and sustain people's identity as members of cultural groups
- Historical value, by providing connections with the past and revealing origins of the present

Each of these dimensions can be seen as serving a social purpose. In this context, historic heritage conservation sustains the heritage of a community. Allen Consulting Group (2005) also described historic heritage as contributing to social capital and sustainable communities by facilitating:

- Employment opportunities and overall contributions to a community's economy.
- Safe, healthy and accessible environments that often include public and green spaces.
- Buildings—both individually and collectively—that can be used for multiple purposes and minimise the use of resources.
- A mix of options for housing.
- Diverse opportunities to experience local culture and foster pride in the community and cohesion within it.
- 'Sense of place'—this may be defined as a characteristic of some geographic place, or a feeling or perception held by people. The term is often used in relation to those characteristics that make a place special or unique, as well as to those that foster a sense of authentic human attachment and belonging.<sup>2</sup>

The authors also referred to an Australian Bureau of Statistics Social Capital Framework (Allen Consulting Group 2005: 10), which includes references to

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<sup>2</sup> Wikipedia definition: [http://en.wikipedia.org/wiki/Sense\\_of\\_place](http://en.wikipedia.org/wiki/Sense_of_place) (viewed 30 April 2008).

culture and history that can be seen as both inputs and outcomes of social capital. Other key features of this framework include notions of social capital that can serve to acknowledge and strengthen ties within a group (known as *bonding* capital), that can serve to improve community cohesiveness across diverse groups (*bridging* capital), and that can serve to link people between various levels of power within a community (*linking* capital) (Spellerberg 2001). The model also links heritage, the development of social capital, and the outcomes of identity and sense of belonging.

The Allen Consulting Group (2005) emphasised that heritage sites or places are not simply a backdrop to the development of social capital. Instead, heritage sites facilitate community involvement and networking, and result in stories associated with the site developing and reinforcing social norms.

Both individual and social perspectives on value suggest that there is no singular notion of *identity*. In New Zealand, as in many other countries, diverse groups have increasingly challenged mainstream notions of national identity (Gore 2002). It is argued that rather than there being one uniform national identity, there can be a multiplicity of identities, which may be based on a wide range of factors including ethnicity, gender, geographical region, religion, occupation or interests. Historical events and practices contribute to the development of identities.

### ***Intrinsic value***

The third type of value was described by Allen Consulting Group (2005) as being intrinsic. Here, the value of heritage is seen as *absolute*, with a worth that is independent of public perception or social capital. They also suggested that value is gained where a heritage site is seen as a *merit good*. Those who define a good as having merit are often people in positions of power (e.g. Government) who determine that the value of something, and therefore its continued existence, is for the good of the public (i.e. a *public good*).

## **3.1.4 Conservation of historic heritage in New Zealand**

The question of heritage value is closely linked to the protection and preservation of historic heritage. This section describes key policies, stakeholders and actions that relate to conserving historic heritage in New Zealand.

### ***Key legislation and agencies***

Three main pieces of legislation govern the management and protection of historic heritage in New Zealand: the Resource Management Amendment Act 2003, the Historic Places Act 1993 and the Conservation Act 1987. National agencies in the heritage sector include the New Zealand Historic Places Trust, the Ministry for Culture and Heritage, and DOC. At the local level, regional and local councils and iwi-based organisations play a key role in heritage protection and management through district plans and resource consent processes. In 2003, the resource management legislation was amended to include protection of historic heritage from inappropriate subdivision, use and development. This legislative change raised cultural heritage to the same level of national importance as natural heritage, implying that there should be greater emphasis on protecting historic heritage in planning activities at the local level.

In 1999, the lead central policy and monitoring role for historic heritage was transferred from DOC to the Ministry for Culture and Heritage. However, DOC has retained central government responsibility for the conservation of natural and historic heritage, largely on Crown conservation lands managed by DOC. This includes restoring, maintaining, protecting and interpreting sites of historic and cultural importance on public conservation land (ICOMOS 2004).

### ***Preservation of historic heritage sites***

Overall, the condition of historic heritage in New Zealand is deteriorating (Alderson 2007; DOC 2007a). As part of its contribution to the international ICOMOS report on heritage that is at risk globally, the New Zealand branch of ICOMOS has highlighted continuing concerns about significant heritage that is at risk in New Zealand (ICOMOS 2004). In the latest report from 2004, members of the New Zealand heritage sector listed a series of particular places and themes considered to be most at risk. These included archaeological sites under threat from rural farming or sea erosion, New Zealand's railway heritage, historic towns, and loss of domestic heritage in growing urban centres.

It is estimated that there are more than 12 000 historic and cultural sites on DOC-managed land (Walton 2005). DOC has set three stages for the protection and management of historic heritage sites: basic protection of all sites from avoidable harm, prioritisation of a set of sites for active management, and full development of a small number of sites.

Protection is the first stage in the management of these archaeological and historic sites on land managed by DOC. These sites are protected from avoidable harm through the identification of sites, an effective work consent system and monitoring (J. McCallum and P. Mahoney, DOC, pers. comm. May 2008).

The second stage is prioritising key historic sites for active management, which involves the stabilisation, repair, restoration and/or adaptation of a historic site, providing visitor facilities and interpretation. DOC has prioritised 660 historic sites for this increased level of management. The decision of which sites should be prioritised is made at the conservancy level (of which there are currently 13) using a heritage significance assessment report. Values are assessed on the basis of criteria outlined in the Historic Places Act 1993. The assessment considers the fabric, history and cultural values, including a national comparison across similar site types and themes. Funding is allocated on the basis of conservancy priorities, which are generally a mix of opportunities and threats (J. McCallum and P. Mahoney, pers. comm. May 2008).

Thirdly, DOC is taking an inter-agency lead in creating a new initiative that chooses to further develop and promote 20 of these key actively managed historic sites. These are branded as ICON sites and they illustrate a variety of classic stories of New Zealand cultural identity. The decision to nominate an ICON site is made at a national level, as is the funding allocation. These sites are developed to provide a *wow* visitor experience that is recommended to friends and family as a *must do*. DOC's promotion of these historic ICON sites also focuses on physical activity and social interaction in beautiful natural settings (J. McCallum and P. Mahoney, pers. comm. May 2008).

Research suggests that there is a low rate of visits by DOC to check or maintain sites: fewer than 16% of sites have had a reported management visit in the last

10 years (Walton 2005). However, reports of a visit may not be made if the site is considered stable and under no threat, so under-reporting may affect the recorded visiting rate for management purposes. There is currently no way to differentiate between 'visited but not reported' and 'not visited at all'.

In the future, baseline data will be collected to allow trends in this area to be tracked. The following indicators, which are set out in DOC's Statement of Intent (DOC 2007b), will be reported on in future years:

- Change in the percentage of historic assets in improving, stable and degrading categories
- Change in the number of historic sites that meet ICOMOS standards
- Change in the number of sites for which key history has been safeguarded

## 3.2 HERITAGE PERCEPTIONS, VALUES AND EXPERIENCES

There has been little research conducted in New Zealand or elsewhere that specifically focuses on historic heritage. Therefore, this section brings together relevant information from both New Zealand and international literature, and draws on research in related areas, such as general conservation or other heritage settings, to appraise how the New Zealand public perceives, values and experiences historic heritage.

### 3.2.1 Perceptions of historic heritage

An exploratory study of public perceptions and expectations of New Zealand's historic and cultural heritage was undertaken by the Centre for Research, Evaluation and Social Assessment (CRESA) in 2000 (Warren & Ashton 2000). This was a qualitative study using focus groups, which provided useful insights into the heritage perceptions of New Zealanders.

The objectives of the CRESA study were to explore what historic and cultural heritage meant to participants, its importance, and how it should be managed. In general, participants said they had not previously given much thought to heritage or discussed it with others. However, as a result of participating in the focus groups, they appeared to become more engaged and committed to the protection of things they identified as part of their heritage.

The CRESA research (Warren & Ashton 2000) identified several general characteristics of heritage, including that heritage:

- Is meaningful and subjective
- Links the past, present and future
- Is a holistic concept
- Is perceived in terms of usefulness

The research also highlighted that concepts in relation to heritage characteristics and components may change. For instance, 'holistic' may mean different things to different people or cultures.

The CRESA research found that heritage values were 'in the eyes of the beholder', so that one group's perception of heritage may differ from others—a similar finding to that of Allen Consulting Group (2005), who conducted research

on heritage in Australia. Perceived usefulness of heritage was important to participants, who felt that things should be useful to achieve heritage status (Warren & Ashton 2000). Participants emphasised that heritage is a holistic concept, and some spoke about heritage as 'the world' and 'who people are', rather than as encompassing a range of separate components. Some participants said it was impossible to have one heritage area that was special to them; rather the whole environment was deemed significant.

The CRESA research (Warren & Ashton 2000) identified specific types of heritage as including landmarks, values, symbols and icons, activities and events, knowledge and skills, and the environment. Landmarks, such as buildings, natural features or amenities, seemed especially important to participants in creating self-identity and community identity; for instance, one immigrant spoke about her need to maintain links with buildings or areas that she had contact with when she first arrived in New Zealand. A few participants in this study highlighted values as an important part of heritage, e.g. values that had been passed down through generations of whanau or family were discussed, while others spoke about collective values, such as the collective responsibility value of a welfare state model.

People in all focus groups in the CRESA research defined heritage as including things they do and events they go to. For instance, activities perceived as heritage included fishing, taking part in music evenings, belonging to patchwork and knitting groups, and events such as Waitangi Day or Guy Fawkes fireworks (Warren & Ashton 2000).

Participants who perceived heritage as holistic also tended to talk about their link to the land and environment when they discussed various components of heritage (Warren & Ashton 2000). For instance, some participants felt that New Zealand's flora and fauna, and unpolluted waterways were key parts of heritage. Often, Maori participants viewed heritage in this way, but some non-Maori also shared this view, especially younger urban-dwellers.

In 2007, a survey on general conservation values in New Zealand was carried out, which reported an apparent low level of public awareness about historic heritage conservation (Research New Zealand 2007). When asked what conservation 'mainly meant' to them, only 2% of the survey respondents from the general public mentioned conserving culture and heritage. However, this finding should be treated with caution, as the most common response given was 'preservation and protection', which could include preservation of historic heritage.

The conservation values survey also investigated public awareness of DOC's activities in historic heritage (Research New Zealand 2007). In general, awareness increased when prompted, but even then one fifth to one half of the general public were not aware that DOC's activities included protecting historic and cultural heritage sites.

This survey found that DOC management staff members were more likely than non-management staff to define conservation as including conservation of culture and heritage. Unprompted awareness of historic and cultural heritage as part of DOC's activities was much higher among DOC staff than the general public (53% compared with only 4% of the general public). However, almost half of the DOC staff surveyed did not include historic heritage within DOC's activities.

### 3.2.2 Valuing historic heritage

#### *Importance and appreciation of heritage*

The research study by CRESA outlined above suggested that heritage was an integral part of people's lives, as the things people defined as heritage gave them a sense of belonging or self, and contributed to wellbeing (Warren & Ashton 2000). For some participants, especially Maori, the sense of belonging gained from heritage also involved connection with the physical and natural world. The researchers suggested that the subjective nature of 'heritage values' implied a need for strong national and local consultation on heritage matters.

Other New Zealand research has also found that the public views heritage as important. A survey by the Ministry for Culture and Heritage investigating perceptions of the importance of culture found that culture and cultural activities were important and relevant to New Zealanders (Ministry for Culture and Heritage 1997). Participants expressed strong support for the protection of heritage and arts education, and an appreciation of Maori culture. In this study, the majority of respondents (96%) agreed with the statement that historic buildings and places should be protected, and of those who agreed, most (76%) strongly agreed. This study also suggested that a high importance is placed on Maori culture and other diverse cultures in New Zealand. For instance, more than 80% of respondents said that Maori culture and cultural activities were an important part of New Zealand's identity, and 88% said that different nationalities and ethnic groups enriched the culture as a whole. The majority of participants (82%) believed the Government should support and encourage culture and cultural activities (Ministry for Culture and Heritage 1997).

Similarly, the study on the value of historic heritage in Australia, conducted by Allen Consulting Group (2005), found high levels of appreciation for heritage. For instance:

- 93% of participants agreed that heritage was part of Australia's identity
- 97% agreed that it was important to teach children about heritage
- 93% agreed that it was important to protect heritage places, 'even though I may never visit them'
- 79% agreed that their life was better for having the opportunity to see or visit heritage
- 56% agreed that looking after heritage was important for creating jobs and boosting the economy

The majority of participants in the Australian study also believed that there were benefits from additional government commitment to heritage conservation. Findings indicated that, on average, participants were willing to pay AUS\$105.90 per person per year for improved heritage protection outcomes in Australia (such as a tightening of development controls and an increase in the number of heritage listings).

Interestingly, a key finding of the CRESA research in New Zealand was that while heritage was highly valued by participants, it also tended to be overlooked, and heritage conservation was seen to be reliant on local voluntary activities (Warren & Ashton 2000). The authors suggested that people needed encouragement at individual and collective levels to talk and critique issues



in relation to heritage, and participants acknowledged that they did not tend to think about heritage until it was threatened. Participants also said that they perceived heritage values as changeable. The value placed on heritage may be influenced by various factors, including feelings of nostalgia, marketing and advertising campaigns, the media, other people's interests (e.g. increased tourist interest in historic sites), education, and threats to the survival of heritage sites, especially buildings (Warren & Ashton 2000).

### ***Value placed on heritage tourism***

Heritage-based tourism is a key growth area in the New Zealand economy, and a significant portion of it is based on conservation lands and waters (DOC 2007b). A recent survey for Tourism New Zealand investigated perceptions of and attitudes towards cultural tourism (Colmar Brunton 2003). Several findings from this research indicated an undervaluing of local cultural tourism products or services, including historic heritage experiences.

The survey identified a sense of 'cultural cringe' by New Zealanders in relation to some cultural tourism products (Colmar Brunton 2003). New Zealanders tended to rate their country's overall cultural offer more negatively than international visitors. Although domestic travellers within New Zealand generally expressed national pride in tourist opportunities in New Zealand, participants tended to be more reserved in valuing 'cultural tourism' than other types, such as outdoors or adventure tourism. In addition, cultural activity participation levels were lower among domestic visitors. In particular, domestic visitors rated New Zealand poorly in terms of historic buildings and were less satisfied than international visitors with sites of importance to Maori history. In contrast, international visitors said that New Zealand compared very favourably with other countries in indigenous cultural products, including Maori historic sites.

The study concluded that it is critical to work with the New Zealand market to encourage domestic travellers to value cultural tourism to a greater degree. The research suggested that improvements in the opportunities for and quality of marae visits, historic sites and exhibitions, and historic buildings will have especially positive effects on improving visitor satisfaction (Colmar Brunton 2003).

### ***Value placed on conservation in general***

New Zealand research has indicated that the public highly values conservation in general and the environment. A conservation values survey (Research New Zealand 2007) found that participants from the general public and from DOC placed high value or importance on conservation and the environment. The majority of participants favoured increased government spending on conservation. The survey identified a group that the researchers classified as 'actively concerned' respondents, who comprised 15% of the sample. These participants were significantly more likely to take environmental-related action, including participation in a project, to preserve the natural environment (41% compared with 27% of other participants).

### 3.2.3 Experiencing historic heritage

#### *Factors motivating people to experience heritage*

There is very little information from New Zealand on what motivates people to access heritage sites. However, there are some relevant findings from related areas in New Zealand and other countries. For example, a body of research has explored visitor experiences, motivations and perceptions in terms of visiting museums, which may be viewed as a *gateway* to becoming more engaged in heritage-related experiences, such as visiting heritage sites.

Exploratory research in New Zealand examined what motivated people to attend museums in the Otago region (Thyne 2001). This research emphasised the diversity of values that motivated people to visit museums. A key finding was that many patrons attended museums as a result of socially oriented values (being with friends and family). Related to this, most respondents said they would only visit the museum if they had someone to go with. The authors contrasted this finding with more traditional assumptions that museum visits are about individualistic values, such as education and knowledge—although museum visitors did also say that they valued increased education or wisdom and being entertained.

Other museum research undertaken in the Otago region has used lifestyle studies to understand how museum and art gallery visits fit in with other aspects of life (Todd & Lawson 2001). The researchers argued that such studies, undertaken across a representative sample of a population, offer the potential to understand why some people visit museums and others do not. The lifestyle research identified seven segments of the population, and found a statistically significant relationship between lifestyle grouping and frequency of visits. The study also found that a sizeable proportion of the population was unlikely ever to visit a museum or gallery, not because of the actual exhibition or institution, but rather because such visits were incompatible with some lifestyles. For example, members of the ‘conservative quiet lifer’ segment of the population were described as *homebodies* who did not search beyond their home environment for entertainment and did not particularly enjoy social occasions. The authors stated that promoters of museums and galleries must make strategic decisions about whether to try to attract those who are currently non-visitors, or to focus on increasing the number of visits and involvement by those currently visiting.

British research exploring the nature of the visitor experience at the Birmingham Museum and Art Gallery (Goulding 2000) found that it was mediated by a number of socio-cultural, cognitive and psychological orientators, as well as physical and environmental conditions. These factors were seen as interacting with each other to mediate the quality of a museum visitor’s experience. The study identified three distinct approaches to understanding the museum visitor:

- Social—Recognised that museum visiting was perceived as meaningful behaviour on the part of an individual in a social context, and that people often visited in groups.
- Cognitive—Recognised intrinsic motivations, such as personal relevance, and extrinsic motivations, such as rewards and feedback.
- Environmental—Recognised that individual behaviour takes place within a setting and highlighted the importance of the physical setting and design.

There is also a body of information available about what motivates conservation volunteers. Information about the motivations of conservation volunteers can provide useful insights for motivating greater engagement with historic heritage. Research in New Zealand has identified perceived value, awareness of threats and personal relevance as the key factors that promote pro-conservation values and behaviours of volunteers (Bell 2003). Similarly, research in other countries has indicated that people tend to support what they believe to be valuable, especially if they consider it to be threatened or in short supply. People are usually most positive and active in their support if there is personal relevance and congruence in terms of values (Bell 2003).

It has also been found that participation in decision-making can motivate people to become involved. New Zealand research for DOC on community-based conservation initiatives found that people who participate in decision-making are more likely to help implement solutions (Bell 2003). Furthermore, if participants are provided with information and support, they are more likely to determine or contribute to appropriate solutions. A New Zealand study on factors that helped or hindered volunteers involved in bush restoration, distinguished two volunteer experiences:

- Citizen led: initiated by volunteers such as interest groups, trusts or neighbours
- Citizen involvement: initiated by outside organisations such as DOC or councils

The study concluded that citizen-led volunteering experiences were more likely to have committed volunteers, promote new voluntary action, and improve the skills of volunteers in contributing to conservation advocacy (Bell 2003).

### ***Possible barriers to experiencing historic heritage***

New Zealand research has investigated barriers to accessing outdoor recreation (Thomas et al. 2006). The barriers in this context are likely to be relevant to historic heritage, as many heritage sites are located in the outdoor environment and some are associated with outdoor activities such as walking.

The most common constraints to participation in outdoor recreational activity reported by respondents were lack of time, weather conditions, the costs of doing the activity, having a disability or health problem, and the activity not being suitable for young children (Thomas et al. 2006). Security was an important concern for a considerable number of people who participated in the research; this mostly related to the risk of vehicle damage and break-ins, but also to being alone or in a small group in an isolated area. Other barriers raised in the research included lack of knowledge or awareness, lack of facilities or opportunities, poor condition of facilities, lack of companions, lack of skills or abilities, and difficulties with transport and access.

### ***Volunteer involvement in conservation in general***

At the time of writing this report, there was a well-developed base of volunteer conservation networks in New Zealand, but little information on volunteers for heritage projects specifically. However, the findings from research with generic conservation volunteers may be relevant to the historic heritage area, as the issues are likely to be similar.

Research in 2003 explored the benefits of DOC's Conservation Volunteer Programme for both volunteers and DOC staff (Bell 2003). It also assessed whether the programme was meeting its goals of conservation advocacy, and identified ways the programme could be improved to increase understanding of, and commitment to, conservation. The research found that volunteering raised respondents' awareness of conservation in several areas comprising DOC's work, including New Zealand's flora and fauna, restoration, pest control measures, ecosystems management, and historical and archaeological management. However, the lowest level of self-reported learning was in relation to historical and archaeological management. Bell (2003) noted that this may reflect a relatively lower priority given to the heritage area by DOC as a whole.

This research (Bell 2003) highlighted a range of reasons why people volunteer for DOC or related New Zealand organisations, such as regional councils, to undertake conservation activities, including the following:

- **Personal enjoyment or interest**—For enjoyment or recreation (the opportunity to spend time in attractive outdoor settings), or due to a personal interest in the environment. A previous study of DOC staff and volunteers (Bayliss 2000, cited in Bell 2003) found that the most common reason volunteer respondents gave for wanting to volunteer was that they wanted to contribute to conservation (31%).
- **Skills and training**—A chance to learn new skills and increase personal knowledge and awareness, for work experience, career or study, to keep mentally stimulated and physically fit, or for a sense of achievement.
- **Social reasons**—To socialise, meet people with the same interests, develop a sense of group identity, or for companionship; to contribute to the community they live, work and play in (to 'give something back'); a desire to improve the environment for the future, so that future generations can enjoy it; or to improve an amenity that the volunteers do not currently use but may wish to use in the future, or that they would like others to have the opportunity to use (this relates to the non-use value of heritage).
- **To raise awareness in others**—To make people aware of conservation issues and to teach others about conservation.

Research indicates that volunteering produces some significant advocacy benefits, including raising awareness of conservation (Bell 2003). An evaluation of Project Conservation, a conservation volunteering project established by DOC to involve the public in conservation activities (James 1990, cited in Bell 2003), found that the project increased understanding of conservation, helped build public support for DOC and encouraged a broad commitment to conservation within the community.

Bell (2003) concluded that DOC's volunteer programme provided opportunities for the public to be involved in conservation activities and to raise awareness and understanding of conservation issues. However, it was noted that the extent to which DOC's volunteer programme was meeting its objective of increasing community commitment to conservation was compromised by the high participation of people already committed to conservation (those already *converted*). It was also noted that there was a lack of clarity of the advocacy goals of the programme for both volunteer participants and DOC staff (Bell 2003).

### 3.3 SUMMARY AND IMPLICATIONS OF LITERATURE REVIEW FINDINGS

The literature review explored how historic heritage is perceived, valued and experienced in New Zealand. Drawing on the findings outlined above, this section refines our definition of 'valuing historic heritage', and summarises what influences the way in which people value and engage with historic heritage. It also draws out potential implications of the review's findings for a social marketing intervention.

#### 3.3.1 Definition and reframing of key issue

The central issue that the historic heritage social marketing project aims to address is an 'apparent undervaluing of historic heritage by the New Zealand public'. The literature defines historic heritage as being related to important historical events, places and/or people, and as being embodied in natural and physical resources. Collectively, these are seen as contributing to an understanding of New Zealand's history and cultures. For the present project, it may be useful to consider a refined definition of historic heritage as relating to specific physical sites of historical value under the management of DOC. A focus on specific heritage sites would include intangible elements, such as stories, memories or links with social networks. Use of this definition should not exclude sites outside DOC's jurisdiction.

Only a small body of research has investigated how historic heritage is valued in New Zealand. Findings indicate that while the public tends to perceive heritage as important, it is not often considered or discussed (Warren & Ashton 2000). Conservation values research suggests that there are low levels of public awareness of heritage conservation in New Zealand and in particular DOC's role in heritage (Research New Zealand 2007). Associated with this is a lack of awareness of, or access to, particular heritage sites. Research on cultural tourism also suggests that there is a degree of 'cultural cringe' in New Zealanders' perceptions of local cultural tourism opportunities when compared with international visitors (Colmar Brunton 2003). Overall, findings from the literature review suggest that the New Zealand public may undervalue historic heritage, at least in terms of seeing its relevance to everyday life and as reflecting New Zealand culture.

### ***Recognising diversity***

Findings suggest that historic heritage sites can be valued quite differently across individuals and groups (Warren & Ashton 2000), so that any one site is unlikely to be viewed uniformly by all members of a community. This implies that rather than focusing efforts on increasing the value of individual historic heritage sites, it may be more meaningful to include a range of sites that have a broad range of appeal and are inclusive of the whole community. Given the diversity of perspectives and the focus on historic sites, a particular challenge will be to increase the engagement of newer migrants to a community, including both immigrants from other countries and people moving from other parts of New Zealand. Although new migrants may not have historical links to heritage sites, other dimensions of value may be promoted, such as opportunities to socialise.

Due to the subjective nature of heritage values, there needs to be strong consultation with people and communities on heritage matters. Such inclusive approaches (e.g. participation in decision-making and community planning) are also likely to increase the sense of ownership over the project and ensure that sites are relevant to the community.

As Maori are the indigenous peoples of New Zealand and Treaty partners, it is important to engage with Maori at the iwi level as well as with relevant Maori organisations. Principles derived from the Treaty of Waitangi suggest that DOC:

- Engages in partnerships with iwi and Maori organisations to promote historic heritage (including allowing Maori to determine what is important for them)
- Actively protects Maori historic heritage sites
- Ensures that Maori participate at all levels in planning and delivering an intervention (e.g. decision-making, delivery, end users)

### **3.3.2 Influences on engagement with historic heritage**

An important finding of the literature review is that the public views historic heritage values as changeable (Warren & Ashton 2000). This suggests that interventions could be developed to increase or improve the value placed on heritage sites. Historic heritage can be valued on a number of levels, including community and individual levels (Allen Consulting Group 2005).

#### ***Lack of salience/personal relevance of heritage***

A perceived lack of personal relevance may be a barrier to valuing or engaging with heritage. While exploratory research on public perceptions of heritage in New Zealand suggests that heritage is considered important, there seems to be a tendency for people to overlook heritage (Warren & Ashton 2000); prior to participating in research on heritage perceptions, members of the public had not generally thought about heritage or discussed it much. This implies that there is a need to raise awareness and relevance of historic heritage in New Zealand.

### ***Other possible barriers***

Unpublished New Zealand research has found a number of barriers to participation in outdoor recreation activities, many of which are likely to also relate to historic heritage. These include lack of time, weather conditions, the costs of doing the activity, having a disability or health problem, the activity not being suitable for young children, and security and safety concerns (Thomas et al. 2006).

These findings suggest that there are a range of factors that could influence physical access to historic heritage. While some of these factors are modifiable, others are not. This may be a particular issue where specific groups within a community are not able to access the site (e.g. families, older people). However, research suggests that historic heritage can be engaged with in a number of ways that do not necessarily involve people actually accessing the sites (Tomlins Jahnke 2002).

From an individual perspective, non-use values, such as those outlined in the Australian heritage report (Allen Consulting Group 2005) and discussed in section 3.1.3, suggest that people can access historic heritage without physically going to the sites. For example, a qualitative study found that Maori women had a strong sense of identity associated with their ancestral home-place or *turangawaewae*, regardless of whether they visited it frequently (Tomlins Jahnke 2002). Alternative ways of engaging with historic heritage could be through printed resources, website technology, museums or story-telling.

Therefore, an important consideration would be whether to focus only on improving physical access to heritage sites and to accept that some people who cannot visit a site may never be able to access it, or whether to also explore the ways in which sites could be accessed without people actually visiting them in person.

### **3.3.3 Future investigation**

At the time of writing this report, there was a paucity of New Zealand research on public attitudes, beliefs and, in particular, perceptions of historic heritage. As a result, the core problem—an ‘apparent undervaluing of heritage’—is assumed. However, it would be useful to test this assumption. Therefore, it is recommended that further quantitative research is undertaken to find out the New Zealand public’s attitudes toward historic heritage, and levels of awareness about historic sites and the need to conserve historic heritage.

There is also a need for more qualitative research on how the public perceives and values historic heritage, including perceptions on what heritage can *offer* the public, and what the alternatives are in terms of *competition* to engagement with historic heritage. In addition, there is a need for benchmark surveys to establish the magnitude of the issue in terms of current levels of public engagement with historic heritage.

## 4. Development of goals and objectives

This section describes how findings from the literature review were used in combination with other information and consultations to develop the goals and objectives for the historic heritage social marketing intervention.

### 4.1 PERSPECTIVES ON HOW HISTORIC HERITAGE IS VALUED

Findings from the literature review suggest there are two main perspectives on how historic heritage can be valued that are relevant to the present project: *social/community* and *individual* perspectives.

#### 4.1.1 Community-level perspectives on value

For the purposes of this project, communities are defined as groups of people who socially interact over a common interest. Typically, communities are described in relation to people that are resident in a defined geographical space. However, *community* can also be applied to sub-groups or *communities of interest*, such as cultural groups, young people or those with interests in certain types of historic heritage (e.g. railways). A community perspective recognises that communities are more than a collection of individuals; they represent opportunities for social interactions and collective identity, and (ideally) mutually supportive environments for their members.

Historic heritage can contribute to a community by providing insights into how that community has evolved, thereby strengthening a sense of place and identity. New Zealand research has found that heritage may be identified as being useful for a range of reasons, including its uniqueness and its contribution to self-identity, cultural awareness, national identity, sense of community, and local job creation and business opportunities (Warren & Ashton 2000). Heritage contributes to a community's sense of place and helps people to connect with the environment.

Community perspectives on historic heritage can be viewed in terms of the contribution of heritage sites to the 'social capital' of a community. In this sense, historic heritage can be seen as an asset and valued in terms of how it contributes to social cohesion and community wellbeing by providing settings where:

- People are able to express their culture (e.g. marae)
- A broad range of people can socially interact
- People are able to participate in the preservation of a community's social assets for future generations

Respectively, these are examples of *bonding*, *bridging* and *linking* social capital, as discussed earlier in section 3.1.3. These concepts may be useful in developing a social marketing intervention that addresses the potential contribution of



heritage to strengthening communities of interest, as well as building links between diverse groups.

It is important to recognise that within a community 'historic heritage' is likely to represent a range of sites. A single site is unlikely to be a significant asset in terms of social capital, but a range of sites are likely to provide a range of social cohesion opportunities and to give the full story on how a community has evolved.

#### **4.1.2 Individual-level perspectives on value**

For the purposes of this project, individuals are defined in the context of being members of a community or communities. For example, an individual may be a resident in a geographic community (e.g. a town) and they may also be a member of a cultural community (e.g. Maori or Chinese). An individual perspective recognises that communities are made up of individuals who both influence and are influenced by their community. Individual perspectives on heritage value suggest that people can value heritage sites in different ways according to individual predispositions (e.g. an interest in historic railways) or their community of interest (e.g. culture).

Findings from the literature review suggest that there is little systematic information available on determinants affecting how historic heritage is valued in New Zealand. As described in section 3.1.3, an Australian report by the Allen Consulting Group (2005) discusses how historic heritage can be valued from an individual perspective using an economically orientated model. This model separated individual perspectives on value into *use* and *non-use* values. Use values were further separated into *direct* (e.g. valuing as a source of income, residence and/or recreation) and *indirect* (e.g. valuing for aesthetic qualities, community image, social interaction) values, and non-use values were divided into *option* (preserving as an option for future use), *existence* (e.g. contribution to identity and uniqueness) and *bequest* (providing a historical legacy for future generations) values.

The diverse ways in which historic heritage sites are valued can indicate the range of potential benefits for each individual (Allen Consulting Group 2005). In social marketing terms, these benefits can be seen as *perceived products*, which could include opportunities for recreation or socialising and providing a sense of place.

Research also suggests that a person does not necessarily have to visit a site to value it (Tomlins Jahnke 2002). For example, benefits from heritage can be gained through knowledge of its presence in terms of providing a sense of place or the possibility of future opportunities to visit it.

#### **4.1.3 Focus of the proposed intervention approach**

To improve engagement with historic heritage, there will need to be change at both community and individual levels. However, in the first instance it is suggested that individual change is prioritised. Therefore, the remainder of this report focuses on bringing about individual change. However, individual change is discussed in the context of engaging wider communities in the intervention and recognising that social change occurs at the interpersonal level. Strategies for engaging the community and principles for community planning are described in section 5.2.2.

## 4.2 FROM VALUE TO ENGAGEMENT: A FOCUS ON BEHAVIOUR

An overview of the planning process used to develop the goals and objectives for the present project is given in section 2.3. In summary, this process requires clear identification of the central issue the project is intended to address, followed by identification of the factors that have led to this issue. A causal model that attempts to map out and explain any inter-relationships between these factors is then developed.

Social marketing programmes usually intend to address issues that are caused by human behaviours, so behavioural change is a core feature of social marketing. Therefore, in developing the goals and objectives for this project, the term *engagement* was primarily used, as it implies a behaviour or action rather than just a perception or attitude.

### 4.2.1 Types of engagement with historic heritage

The economically orientated model described by the Allen Consulting Group (2005) was used as the basis for developing the logic model and goals and objectives for the proposed historic heritage social marketing intervention. The recommended intervention was then refined and further details were provided where necessary using additional information from the literature review and consultative workshops. The use and non-use values described in the model were reframed as types of *engagement* with historic heritage. These can be summarised as:

- Historical
- Cultural
- Physical
- Aesthetic
- Social

Table 3 provides an overview of the definition for each of these engagement types.

TABLE 3. WAYS IN WHICH PEOPLE ENGAGE WITH HISTORIC HERITAGE.

ENGAGEMENT TYPE	DEFINITION
Historical	Linked to important historical events or people: <ul style="list-style-type: none"><li>• Influenced how the present day community was established</li><li>• Should be preserved for future generations</li></ul>
Cultural	Specific cultural groups identify with the site
Physical	Being of practical use, e.g: <ul style="list-style-type: none"><li>• Work</li><li>• Living</li><li>• Recreation</li><li>• Culture</li></ul>
Aesthetic	Enhancing the aesthetics of the community: <ul style="list-style-type: none"><li>• Site restored</li><li>• Site seen as relevant (see other factors)</li><li>• Site attractive</li></ul>
Social	A venue for socialising

The next step in the process was to reframe these types of engagement as ‘risk factors’, or influences resulting in a lack of engagement or undervaluing of historic heritage (Table 4). For example, where lack of engagement with a particular site was seen as the *issue* (column 3), the site not being seen as being of historic value was described as a *risk factor* (column 2). An emphasis on how the site was valued was important to this process, as it indicated what people perceived as the benefits of the site. Once the risk factors had been identified, each factor was reviewed to identify what might contribute to it occurring. These were defined as contributing risk factors (column 1). As discussed above, there was little available evidence to guide identification of risk and contributing risk factors; therefore, a common sense approach was employed.

TABLE 4. INDIVIDUAL INFLUENCES ON ENGAGEMENT WITH HISTORIC HERITAGE.

CONTRIBUTING RISK FACTOR	RISK FACTOR	ISSUE
<ul style="list-style-type: none"> <li>• Lack of awareness of range of historical heritage sites within a community</li> <li>• Lack of perceived historical importance/relevance:               <ul style="list-style-type: none"> <li>—People</li> <li>—Events</li> </ul> </li> </ul>	Site not seen as being of historical value	People do not engage with the site
<ul style="list-style-type: none"> <li>• Individuals do not link site with a sense of place for own groups/culture (<i>bonding</i> social capital)</li> <li>• Individuals do not consider/appreciate site as a sense of place for other groups/cultures (<i>bridging</i> social capital)</li> </ul>	Site not seen as being of cultural value/providing a sense of place	
<ul style="list-style-type: none"> <li>• Individuals do not use site for work purposes, employment, recreation, etc.</li> </ul>	Site not seen as being of practical use	
<ul style="list-style-type: none"> <li>• Site not physically appealing</li> <li>• Site not psychologically appealing</li> <li>• Condition of site makes it unattractive</li> <li>• Features of site not seen as attractive</li> </ul>	Site not seen as attractive	
<ul style="list-style-type: none"> <li>• Site not conducive to socialising</li> <li>• Individuals do not want to socialise with people perceived to attend site</li> </ul>	Site not seen as providing an opportunity to socialise	

### 4.3 MODEL FOR INCREASING ENGAGEMENT WITH HISTORIC HERITAGE

Once the central issue and factors associated with engagement with historic heritage had been identified, they were reframed to reflect a logical series of *states* that need to occur for people to become more engaged with historic heritage. For example, ‘individuals do not use sites’ became ‘people use sites for a range of activities’. This series of states was then presented as an outcomes model. From this model, it was evident that people can engage with historic heritage in a number of ways; for example, for any given heritage site, types of engagement may depend on how people perceive the site and the features the site has to offer. The various forms of engagement with a site will reflect how it is valued.

It is unlikely that all members of a community would engage with a site in the same way or that a single site would have all the attributes of engagement described in the outcomes model. Therefore, for the social marketing pilot, it is suggested that a *suite* or group of sites are identified that collectively offer opportunities across the spectrum of engagement types. Collectively, these sites could be considered as representing historic heritage in a given community. The long-term goal for the model is that ‘people are engaged with historic heritage within their community’.

The six medium-term outcomes are seen as intermediary states that need to be realised before people in a community are fully engaged with historic heritage:

1. **Awareness of historic heritage within the community**—Acknowledges that the primary reason these sites are important is because of the historic events and people associated with them. While types of engagement would vary across the sites within a community, it would be expected that community members are aware of and engage with the historic aspects of each site. Awareness is also a pre-requisite for a number of the other medium-term outcomes identified in the outcomes model.
2. **Dialogue about the relevance of historic heritage**—Emphasises that for sites to have meaning, community members need to engage in dialogue, conversation or formal discussion about what the sites mean to them and other people. The fact that people are engaging in dialogue implies that the site has importance. A desirable result of this dialogue would be that people appreciate the value of these sites both to themselves and other community members.
3. **Sense of place**—Recognises that if a site has historic heritage value to a community, there is the implication that it is unique and has meaning for community members. The term ‘sense of place’ has been interpreted broadly for this project. It may be defined both as a characteristic of some geographic places and as a feeling or perception held by people. The term is often used in relation to those characteristics that make a place special or unique, or foster a sense of authentic human attachment and belonging<sup>3</sup>. In a heritage context, this means that groups of people identify sites as providing a sense of place, and that those sites have cultural or social values attached to them. Sites may provide a sense of place for sub-groups within a community (e.g. a pa site for local Maori), or for the entire community (e.g. a traditional meeting place).

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<sup>3</sup> Wikipedia definition: [http://en.wikipedia.org/wiki/Sense\\_of\\_place](http://en.wikipedia.org/wiki/Sense_of_place) (viewed 30 April 2008).

4. **Use of sites for a range of activities**—Suggests that people may actively use sites for a range of purposes. Some of these purposes may be directly related to the historic nature of the site (e.g. volunteering to restore a site, or as a place to learn more about the history of the community) or for the features that the site offers (e.g. local employment as preservation workers or guides, or recreational use). Improving how sites are used will increase the value of a site. However, it is also important to ensure that these sites are used in a sustainable manner that does not damage or impede the preservation of a site and that is respectful of any groups that are traditionally associated with the site.
5. **Appreciation for aesthetic reasons**—Recognises that people can engage with the aesthetic aspects of a site, such as by visiting a site in order to appreciate its aesthetic qualities. A site with good aesthetic appeal is likely to be conserved. Aesthetics can be separated into physical (how the site actually looks, and creative and engineering features) and psychological (the appeal of the stories associated with sites, how people associate with these stories and any learning that can be derived from these stories). A particular challenge is the principle that original features of sites should not be altered, unless for conservation purposes. For example, it may be inappropriate to change a colour scheme of a building for purely aesthetic reasons. However, there are a range of practical activities that can be undertaken whilst retaining original features, including maintaining sites to a presentable state (people can see where they are/were, they are safe and they can be accessed for their intended use) and making the stories associated with them available and retelling them in relevant and engaging ways.
6. **Social opportunities**—Connects to social capital and the function that historic heritage can play in facilitating social cohesion. This outcome is related to the fourth outcome, but emphasises the value that social opportunities play in providing supportive environments for individuals and for strengthening families and communities.

#### 4.3.1 **Action to conserve historic heritage**

With the exception of ensuring that sites are in a presentable state, the outcomes model does not include ‘conservation of historic heritage’ as a short-, medium- or long-term outcome. This is because conservation is seen as both an input and an ultimate outcome. For a site to be selected, it needs to have been conserved to some degree; at the very least, there should be some visual evidence of the history and/or associated stories. It is expected that as people become more engaged with sites in their communities, there would eventually be an increase in conservation activities across a broad range of sites.

## 5. Social marketing intervention

This section describes the social marketing intervention's goal and objectives, and suggests ways in which the intervention could be delivered.

### 5.1 PROPOSED GOALS AND OBJECTIVES

Figure 1 sets out the proposed goals and objectives for a social marketing intervention to increase community engagement with historic heritage. The proposed goals and objectives have been developed from a set of desired outcomes agreed by the working group. Outcomes were reworded as objectives and strategy objectives by reframing the states described in the model as changes required to achieve those states. For example, 'people use sites for a range of activities' became 'increased use of sites for a range of activities' (Fig. 1).

Ideally, any known trends in the risk factors (Table 4) would have been used to formulate their corresponding objectives; for example, whether the objectives should be stated as promoting an increase or decrease, or referring to the degree of change that is required (e.g. percentage changes). However, there was a paucity of literature that described trends in the underlying risk factors. Therefore, the nature of the objectives has been assumed and they generally refer to *increasing* or *strengthening* key factors. It would be useful if any evaluations of the proposed historic heritage social marketing intervention explored the validity of any assumptions made during the planning stages. It is probable that the objectives will be modified as more is understood about the nature of these risk factors and what their associated objectives can realistically achieve.

The plan setting out the goals and objectives is referred to as a *general* plan. It is expected that the detail within each of the objectives and sub-objectives will need to be adjusted according to the context and communities within which the goals and objectives are being implemented.

### 5.2 IMPLEMENTING THE SOCIAL MARKETING INTERVENTION

#### 5.2.1 Bicultural and multicultural perspectives

It is evident that any given geographical community is made up of a range of groups. Of particular interest are cultural groups, as their histories are often associated with specific historic heritage sites. In terms of culture, a primary distinction can be made between the indigenous peoples (Maori) and those who have arrived subsequently. This does not imply that cultural groups other than indigenous peoples are less important, but recognises obligations to, and rights of, indigenous peoples in relation to preservation of heritage. Therefore, there is a need for both bicultural and multicultural approaches.

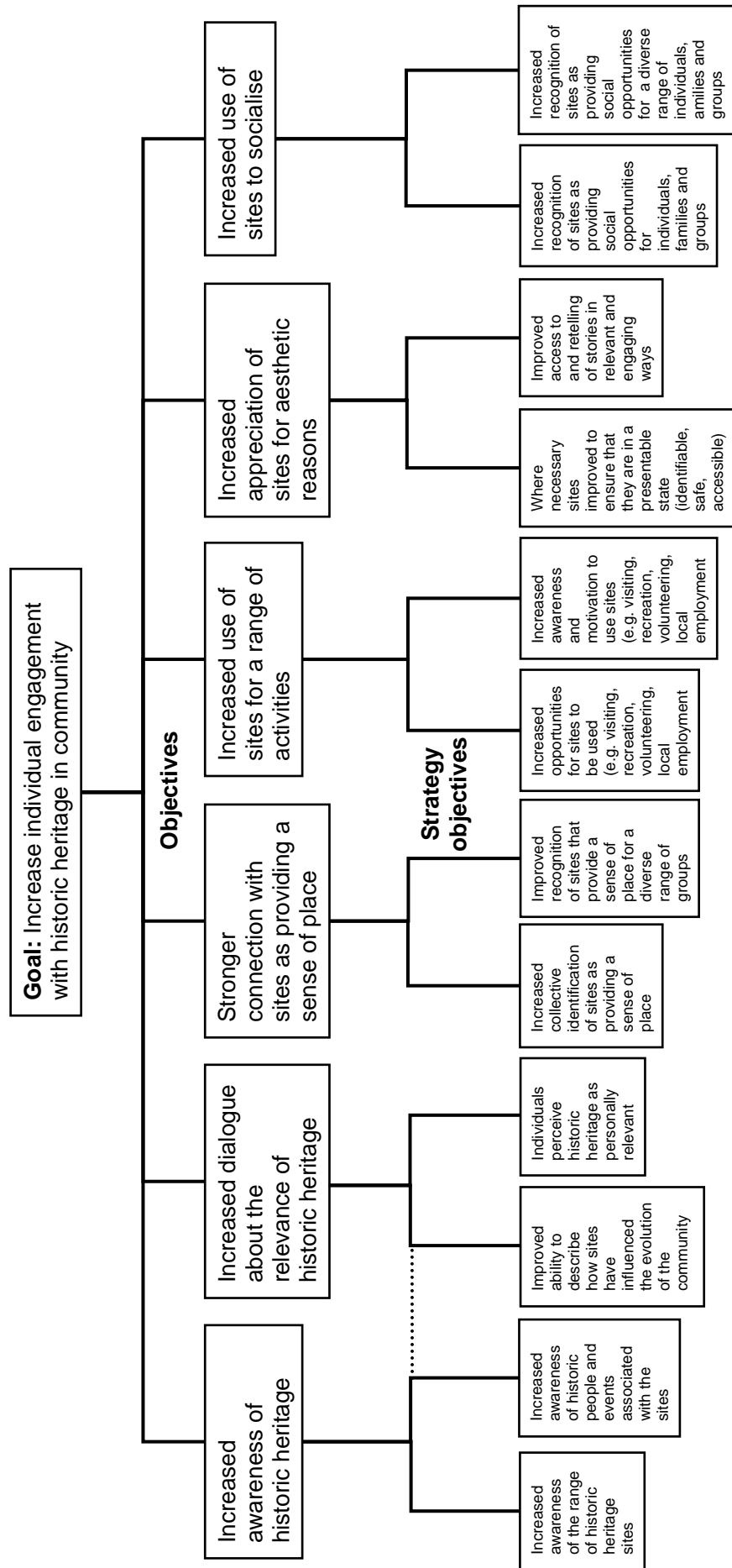


Figure 1. Goals and objectives to increase engagement with historic heritage.

Section 5.2.2 outlines a process for engaging communities in the proposed social marketing intervention. It is recommended that this process includes activities specifically designed to engage with Maori communities. These could include:

- Linking with local iwi and Maori organisations to ensure they participate in decision-making and are recognised (where appropriate) as kaitiaki
- Facilitating the development of partnerships
- Linking with local Maori DOC representatives
- Ensuring Maori actively participate at all levels (as employees of DOC, in decision-making and delivery, and as end users)

### **5.2.2 Suggested approach to implementation**

Findings from the literature review imply that the social marketing intervention should be implemented in a staged manner, due to the limited knowledge base, possible low levels of awareness and the tendency for people in New Zealand to overlook heritage. Three suggested stages are set out below.

#### ***Stage One—Community planning***

The most effective and sustainable community organisation approaches are based on an assessment of community needs, engage and empower communities (including relevant groups within those communities), and contribute to increased community capacity. Therefore, it is recommended that a community planning approach is used for the social marketing pilot, whereby one particular community is engaged to trial the intervention. This may be a geographically defined community or a ‘community of interest’, such as a cultural or interest group. Potential objectives for a community planning approach include:

- Achieving meaningful engagement with key sectors/groups within the community
- Raising awareness of key historic heritage issues affecting the community
- Ensuring that historic heritage is defined and interpreted in a way that has meaning for key sectors of the community
- Identifying key historic heritage sites within communities and the meanings and values attached to them

Community planning is an effective approach to engage communities using principles of partnership and participation. It is a structured process whereby a community is engaged on an issue and collectively identifies resolutions to rectify the issue.

Community planning can be useful for working within particular neighbourhoods, geographical areas or ethnic groups, but it can also be used with communities based on interest. The latter may be relevant in the context of heritage, since current community action around heritage tends to be undertaken by interest groups such as conservation groups or iwi.

Theories and models of community planning and related approaches continue to evolve, and some early approaches have been criticised for being overly focused on *problems* and dependent on *experts*. In reality, many community-based projects draw on a mix of models, such as community planning, social action and community development approaches. The process of developing a social



marketing intervention through a community planning approach could serve to engage communities and support heritage conservation, regardless of the actual social marketing intervention.

### ***Stage Two—Raise awareness of heritage***

Once a community has identified and selected several heritage sites for the purpose of the pilot, the second stage is to raise awareness of heritage among people in the community. This stage aims to achieve the first three medium-term outcomes in the outcomes model:

- People are aware of the historic heritage in their community
- People have dialogue about the relevance of historic heritage
- A broad range of people relate to sites within their communities as providing a sense of place

### ***Stage Three—Promote behavioural change (increased levels of engagement)***

Once levels of awareness of historic heritage among the community have been raised, efforts to promote behavioural change should be undertaken. This stage relates to achieving the last three medium-term outcomes in the model:

- People use sites for a range of activities
- People appreciate sites for aesthetic reasons
- Individuals, families and groups use sites as places to socialise

## **5.2.3 Considerations for a pilot intervention**

It was beyond the scope of the present project to provide a comprehensive set of recommendations for strategies to achieve the objectives of the social marketing intervention. However, during the course of undertaking the literature review and stakeholder consultations, and whilst developing the outcomes model, goals and objectives, a number of potential strategies were identified. These are summarised below. Further information on lessons from previous social marketing experience in New Zealand is also provided in Appendix 3.

### ***Leverage off existing perceptions of the importance of historic heritage***

Despite an apparent low level of awareness and engagement with historic heritage in New Zealand, the research suggests there is good potential for increasing engagement of the public with historic heritage. The literature review indicates that members of the public generally hold very positive attitudes toward historic heritage and believe it to be important, which is a strong foundation for a social marketing intervention aiming to increase engagement with heritage.

### ***Highlight perceived threats to historic heritage***

A key finding from New Zealand research has been that people tend to be unaware of heritage until they realise that a particular heritage building, site or place is threatened in some way (Warren & Ashton 2000). Similarly, other research in New Zealand has found that awareness of threats is a key factor promoting the development of pro-conservation values and behaviours of volunteers, and research in other countries has also suggested that people tend to support what they believe to be valuable, especially if they consider it to be threatened or in short supply (Bell 2003). These findings suggest that an effective strategy for increasing engagement with heritage may be to raise public awareness about current risks to heritage—the literature review confirmed that the condition of historic heritage in New Zealand is deteriorating and there are concerns about aspects of heritage at significant risk.

### ***Importance of personal relevance***

New Zealand research has indicated that personal relevance is an important factor promoting development of pro-conservation values and behaviours of volunteers (Bell 2003). Therefore, the social marketing intervention should ensure that historic heritage is promoted in a manner that is personally relevant and congruent to people's values and lifestyles.

### ***Importance of participation in decision-making***

Participation in decision-making would be a further motivating factor in engaging with historic heritage. New Zealand research with conservation volunteers has suggested that people who participate in decision-making and are provided with information and support are more likely to help determine and implement solutions (Bell 2003).

### ***Potential for volunteer involvement to help increase awareness and engagement***

Research in New Zealand has suggested that volunteering in conservation can help to raise awareness of conservation issues (Bell 2003). However, most volunteers are already committed to conservation. Therefore, a potential strategy for raising awareness of historic heritage may be to increase the number of people involved as volunteers on heritage projects, and in particular to recruit people without previous involvement or commitment. One strategy to achieve this would be to increase school-based programmes focused on heritage sites. In this case, the focus of engagement would be on groups of school students rather than individual volunteers. Alternatively, existing individual volunteers could be encouraged to broaden their engagement with a site, e.g. through widening perceptions of volunteering from a social opportunity to increased commitment to preserving a site because of its historical relevance.

### ***Potential for increased use of information technology and innovation***

There is potential for greater use of information technology (IT) and other innovative methods of promotion. The fact that people do not necessarily have to physically visit a historic heritage site in order to value and appreciate heritage (Tomlins Jahnke 2002; Allen Consulting Group 2005) suggests that web-based social marketing may be appropriate. Considerable benefits may be gained through 'virtual visiting' of historic heritage sites. In particular, use of web-based and other technologies such as texts or iPods may be an effective way of reaching young people.

### ***Ensure a range of products are promoted***

The concept of *product* is important in social marketing. This is the action or behaviour for which the consumer is requested to exchange existing behaviours. The actual product can be seen as specific behaviours related to actively valuing or engaging with historic heritage, e.g. voluntarily visiting a heritage site. It is also important to recognise that while people may exhibit similar behaviours, they may do so for different reasons, e.g. one person may visit a heritage site for cultural or educational reasons, while another may do so to socialise with their peers. These reasons reflect the diversity of perspectives and views on any particular heritage site and are the 'perceived products'. As part of developing the social marketing intervention, it would be important to develop strategies that promote a range of perceived products for various historic heritage sites within a community.

## 6. Conclusions and recommendations

This project has developed a set of goals and objectives for a proposed social marketing intervention to increase engagement with historic heritage. The development of the recommended approach was based on a review of relevant literature, several workshops with key stakeholders and the application of a programme planning approach.

The project divided the concept of value into three perspectives: individual, social and intrinsic. Heritage can contribute to individual identity and wellbeing, as well as to the development of social capital and community cohesion. The literature review indicates that there has been minimal research examining how historic heritage is valued in New Zealand. Findings suggest that although the public tends to perceive heritage as important, it is not often considered or discussed (Warren & Ashton 2000). The conservation values study suggested that there are low levels of public awareness of heritage conservation in New Zealand and in particular of DOC's role in heritage (Research New Zealand 2007). Therefore, it is anticipated that there may also be a lack of awareness of, or access to, particular heritage sites. Overall, findings from the literature review suggest that the New Zealand public may lack engagement with historic heritage.

The proposed goals and objectives identify a range of opportunities to increase engagement with, and ultimately improve the value that people place in, historic heritage. It is expected that an increase in value would lead to improved support and effort to conserve New Zealand's historic heritage. The goals and objectives provide a starting point for a planned approach to the intervention, and a logical basis for the development of specific strategies and actions.

Any social marketing pilot intervention in a selected community should use a community planning approach to increase public engagement with heritage. A suite of specific historic sites should be identified by the community in order to trial the social marketing intervention.

A key strength of this project was the multi-disciplinary nature of the DOC team involved in developing the goals and objectives. Meaningful engagement of participants in discussing and debating the issues from various perspectives strengthened ownership over the project and ensured that it could be practically applied.

This exploratory project is the first known application of social marketing to the historic heritage area in New Zealand and internationally. Although it is based on available evidence, there are research gaps in terms of understanding the New Zealand public's engagement with historic heritage. Therefore, the authors recommend:

1. Further research on public perceptions of, and engagement with, historic heritage in New Zealand, to strengthen the evidence base for the application of social marketing to historic heritage.
2. Further planning work in partnership with social marketing expertise to develop strategies and actions for the proposed social marketing intervention.
3. A pilot social marketing intervention in a selected community, using a community planning approach and the proposed goals and objectives.
4. Implementation of evaluations to aid in the development and assessment of the effectiveness of any pilot interventions.

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## 9 Glossary of key terms

**Aesthetic value** The physical and cognitive qualities of a historic heritage site. Physical qualities can include creativity in design and/or engineering. Cognitive qualities can include any emotive response in relation to stories and other information in relation to a site.

**Community** For the purposes of this report, usually relates to a geographically defined location where people live. However, can also include communities of interest (e.g. cultural, or around a specific type of site).

**Engaged** For the purposes of this report, refers to actions (behaviours) associated with increased value of historic heritage. A number of dimensions of value have been identified (e.g. use) and these have been restated as influences (outcomes or objectives).

**People** Generally associated with a particular community or group. Depending on how or where the intervention is implemented, this term can be changed (e.g. in a geographic community it could be *residents*).

**Sense of place** Can refer to a characteristic of particular geographic places, or to a feeling or perception held by people (rather than by the place itself). It is often used in relation to those characteristics that make a place special or unique, as well as to those that foster a sense of authentic human attachment and belonging (Wikipedia definition: [http://en.wikipedia.org/wiki/Sense\\_of\\_place](http://en.wikipedia.org/wiki/Sense_of_place); viewed 6 February 2009). In relation to historic heritage, people may refer to and use heritage sites as part of their identity and sense of belonging.

**Site** A geographically defined location known to have historic heritage value.

**Story** Information and experiences of people and events associated with a site. These give the site its meaning.

**Useable** Specifically used in relation to 'sites in a presentable state'. Refers to a site being of a standard that allows it to be used for its intended purpose (which depends on other values associated with the site).

**Used** The actual use of a site for various purposes.

**Value** In association with historic heritage, implies that sites can be viewed in terms of their social or economic benefits. Sites that are seen to have higher value can also be seen as having higher worth and are more likely to be conserved. Conversely, sites of lower value are less likely to be conserved, as fewer resources are likely to be allocated to ensure their preservation.



# Appendix 1

## RELEVANT THEORIES

A range of theories can be used to understand how people engage with historic heritage and what can be done to increase their engagement. Generally, these theories can be separated into intrapersonal-, interpersonal- and community-level theories, describing influences that operate at personal through to community levels. Relevant examples of these groupings of theories are given below.

In practice, any single theory is usually insufficient to describe the full range of influences that act on individuals, groups or communities to result in a given behaviour. Therefore, it is recommended that an *ecological* approach is adopted, which applies theories at multiple levels (Glanz et al. 2005).

### A1.1 Intrapersonal-level theories

Intrapersonal-level theories relate to those dispositions within an individual that may predispose them to certain behaviours. These dispositions can include genetic, physiological and psychological factors. By definition, social marketing interventions can include individual-level theories; however, to bring about a social change, theories at other levels should also be applied.

#### *Exchange theory*

Evolving from psychology and economic foundations, exchange theory aims to explain how to move an individual to the next stage of behavioural change. It assumes that people are ‘needs directed’ and have historically cooperated and mutually benefited from the exchange of tangible and intangible items to satisfy their needs. As cooperation has evolved, this has contributed to people and parties seeking a *win-win* exchange.

A social marketer can increase the readiness of a consumer to change by providing something beneficial to the consumer in exchange. Five prerequisites have been identified as requirements for the exchange to take place:

- There are at least two parties
- Each party has something that might be of value to the other party
- Each party is capable of communication and delivery
- Each party is free to accept or reject the offer
- Each party believes it is appropriate or desirable to deal with the other party

Social marketing usually involves the mutual transfer of psychological, social or other intangible entities—symbolic exchange (Hastings 2007). The exchange of intangible entities can be seen as an opportunity by social and commercial marketers. There is evidence that people respond to appropriately targeted incentives as a way of changing behaviour, and incentives can be used to support exchange theory. The application of exchange theory may be relevant if presented mutually to the wider community as a way to preserve the historic and cultural heritage.

### ***Stages of Change theory***

The Stages of Change theory, or Transtheoretical Model, was originally introduced as an integration of theories and concepts across clinical psychology. The underpinning conceptual framework is that change occurs in a series of stages as a process rather than an event. Motivation to move between the stages is predicted by a person's willingness and readiness to change. The most common stages used are pre-contemplation (not thinking about change or suppressing thoughts of change), contemplation (considering change but taking no action), planning or preparation (anticipating making efforts to change and considering the behaviour), action (actually engaging in efforts to change) and maintenance (expending effort to retain the behavioural change).

The motivation to change comes from decisional balance, or weighing up the 'pros and cons' of performing a specific behaviour. The resources needed to change include self-efficacy and processes of change, which are tailored to correspond to each particular stage.

## **A1.2 Interpersonal-level theories**

Interpersonal-level theories relate to the influences on people from their immediate environment (and vice versa), and recognise the interactive nature between the behaviour of people and their physical and social environments. The immediate environment can include family, peers and role models (e.g. sports people).

### ***Social cognitive theory***

This theory has evolved from social learning theory and recognises that individual behaviour can be the result of the individual and their interactions with their social environment. This theory is widely used in health and social interventions, and has six key constructs:

- **Skills**—New skills are often needed for new behaviours to be adopted. The easier it is for skills to be adopted (in terms of access to opportunities to learn them and the ease with which they can be learned), the more likely people will be to learn them.
- **Confidence**—Once someone has learned new skills, they need to feel confident in their ability to apply them
- **Social learning**—A key means by which people learn new behaviours is through watching the behaviours of others. This component of the theory highlights the need for relevant role models. For example, the successful development of the Otago Central Rail Trail as a historic heritage site could be used to assist with the development of rail trails in other areas.
- **Expectations**—The perceived costs or benefits of a new behaviour. It is expected that a local community will weigh up the costs and benefits of preserving and/or restoring a local cultural site.
- **Reinforcements**—Whether the community organisation receives any positive or negative rewards as a result of work towards the preservation or restoration of a local cultural site. This could be in the form of encouragement from others or feelings of being a *good* citizen.

- **Reciprocal determinism**—The interactive nature between individuals and their environment. For example, if a local group has previously succeeded in a restoration project, they may actively start to restore cultural sites in settings where this has previously been considered too hard. This construct highlights the interaction between individuals and their social and physical environment as being a two-way process.

### A1.3 Community-level theories

Community-level theories recognise that a group of people can be seen as more than a collection of individuals: the group represents an interactive system that influences and is influenced by its members. For example, questions about why certain groups of people are more likely to have lower or higher socio-economic positions are usually answered at the community and societal levels.

#### *Diffusion of innovations*

This theory describes the process through which new ideas are introduced to a community. As the name suggests, this theory suggests that new ideas *diffuse* through a community. By understanding this process of diffusion, social and health issues can be promoted as ideas that bring about community change. In summary, the process of change is described as being carried through five sets of groups:

- **Innovators**—People who are responsive to new ideas and willing to give them a try. Sometimes the ‘new idea’ has positive results and sometimes negative. In a sense, these people are seen as risk takers.
- **Early adopters**—People who, after observing innovators, try a new idea with success and decide to adopt it. Sometimes these people are described as ‘opinion leaders’. Their actions influence others and the adoption of a new idea by early adopters can sometimes signal what is often described as the ‘tipping point’—the point at which an idea suddenly becomes accepted and rapidly diffuses throughout society.
- **Early majority**—People who are influenced by observing that a new idea is being rapidly adopted and becoming a norm.
- **Late majority**—People who are influenced by observing that a new idea is being rapidly adopted and becoming a norm, but at a later stage than the early majority.
- **Laggards**—People who are resistant to change and are often described as conservative.

This theory has a number of overlaps with other theories, especially social cognitive theory. A key means by which the idea is diffused is through communication and observing others.

A number of characteristics have been identified as being associated with an idea being successfully adopted within a community:

- Compatibility with existing beliefs and behaviours of the adopter
- Clarity of the relative advantage of the innovation
- Simplicity of the innovation (the ease with which it can be adopted)
- Trialability—the higher the risk, the less likely someone will adopt the idea
- Observability of the results of trying a new innovation (similar to expectations described under social cognitive theory above)

### ***Community planning and community development***

Community planning comes under a wider framework of 'community organisation', which is the process by which community groups are assisted with identifying common concerns or goals, mobilising resources, and developing and implementing strategies to achieve their goals. Community planning refers to a structured process through which a community is engaged on an issue and collectively identifies resolutions to rectify the issue. It is characterised as being task-orientated and expert-driven, and typically produces tightly organised and planned programmatic responses. It tends to draw on epidemiological analysis of issues. Professional *planners* are closely involved in developing and implementing solutions, taking a role of 'fact gatherer and analyst'.

Community development is a structured intervention that gives communities greater control over the conditions that affect their lives. Community development includes the following features<sup>4</sup>:

- The first priority of the community development process is to actively empower and enable groups who are traditionally deprived of power and control over their own affairs.
- Community development is about developing the power, skills, knowledge and experience of people as individuals and in groups, thus enabling them to undertake initiatives of their own to combat social, economic, health and environmental problems.
- Members themselves define the problem, identify possible solutions, and take steps to make the changes necessary at their own pace and according to their priorities.
- It works at the level of local groups and organisations rather than with individuals or families.

Community development approaches are particularly helpful when working within particular neighbourhoods or geographical areas or with minority ethnic groups, but they can also be used with 'communities of interest'. This application may be relevant to historic heritage conservation, since current community action for conservation tends to be undertaken by such 'communities of interest'.

In reality, many community development projects draw on a mix of models, such as community planning, social action and community development approaches. Contemporary models of community development emphasise self-determination and empowerment of communities, with a strong emphasis on developing community leadership and capacity.

Minkler (1999, cited in Nutbeam & Harris 2004) defined empowerment as a social action process by which individuals, communities and organisations gain greater control in their lives in the context of changing the social environment to improve equity and quality of life. Rissel (1994, cited in Nutbeam & Harris 2004) suggested a continuum of empowerment:

- People can be worked with in ways that increase individuals' confidence in their own capacity to create positive change.

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<sup>4</sup> Community development definition was sourced from website information on community development at [www.maaori.com/develop/commwhat.html](http://www.maaori.com/develop/commwhat.html) (viewed 10 April 2008).

- Involvement in peer support, self-help or social action groups builds and expands social networks and increases critical awareness of wider social forces. Such involvement builds skills and increases capacity of communities.
- As a community becomes more empowered, it will work on particular issues, link with other groups, or engage in collective political or social action.

These distinct stages of empowerment are described in a health promotion context; however, these could also be applied to developing appreciation of cultural and heritage sites.

In summary, the most effective and sustainable community organisation approaches are those that:

- Are based on an assessment of community needs
- Engage and empower communities
- Contribute to increased community capacity

# Appendix 2

## HISTORIC HERITAGE IN LEGISLATION

New Zealand has a number of legislative definitions for historic heritage and associated terms, which are broadly similar. Key pieces of legislation that define historic heritage include the Conservation Act 1987, Historic Places Act 1993 and the Resource Management Amendment Act 2003.

### A2.1 Definitions of historic heritage

Both the Conservation Act 1987 and the Historic Places Act 1993 specifically discuss conservation in relation to preserving historic heritage:

***Conservation** means the preservation and protection of natural and historic resources for the purpose of maintaining their intrinsic values, providing for their appreciation and recreational enjoyment by the public, and safeguarding the options of future generations.*

(Conservation Act 1987: Interpretation Section)

***Conservation** includes the processes of preserving, maintaining, and restoring historic places and historic areas so as to safeguard their historical and cultural values.*

(Historic Places Act 1993: Interpretation Section)

The Historic Places Act 1993 describes historic areas and places as:

***Historic area** means an area of land that—*

- (i) Contains an inter-related group of historic places; and*
- (ii) Forms part of the historical and cultural heritage of New Zealand; and*
- (iii) Lies within the territorial limits of New Zealand:*

***Historic place** -*

*a) Means—*

- (i) Any land (including an archaeological site); or*
- (ii) Any building or structure (including part of a building or structure); or*
- (iii) Any combination of land and a building or structure; or*
- (iv) any combination of land, buildings or structures, and associated buildings or structures (including any part of those buildings or structures, or associated buildings or structures) that forms a place that is part of the historical and cultural heritage of New Zealand and lies within the territorial limits of New Zealand; and*

*b) Includes anything that is in or fixed to such land:*

The Resource Management Amendment Act 2003 (Interpretation Section) defines historic heritage as:

- (a) those natural and physical resources that contribute to an understanding and appreciation of New Zealand's history and cultures, deriving from any of the following qualities:*
  - (i) archaeological:*
  - (ii) architectural:*
  - (iii) cultural:*
  - (iv) historic:*
  - (v) scientific:*
  - (vi) technological ...*

## **A2.2 Examples of historic heritage**

The Resource Management Amendment Act 2003 (Interpretation Section) provides specific examples of historic heritage:

- (i) historic sites, structures, places, and areas; and*
- (ii) archaeological sites; and*
- (iii) sites of significance to Maori, including wahi tapu; and*
- (iv) surroundings associated with the natural and physical resources*

Other examples described in the Conservation Act 1987 and the Historic Places Acts 1993 include place names, objects, artefacts, natural features of cultural and historical significance, historical associations, people, and institutions.

# Appendix 3

## RELEVANT LESSONS FROM OTHER SOCIAL MARKETING INTERVENTIONS

### A3.1 Generic lessons from social marketing

Large-scale and enduring behavioural change is best achieved through changing community norms, which takes time. Research and experience from social marketing in New Zealand and other countries suggests that it takes several years for success (Sheehan 2005). Larger social marketing interventions often move through phases, going from raising public awareness in the initial phases to attempting to bring about specific behavioural change in later phases. Hence, a historic heritage social marketing intervention should be clear about the behavioural change it is trying to ultimately achieve, but also realistic about the long-term nature of the project and the need for a staged approach.

Effective social marketing interventions include comprehensive, integrated approaches that employ multiple intervention strategies and communication channels. For example, a comprehensive intervention might both raise public awareness and address environmental barriers to change. Evaluation, monitoring and tracking are essential to the success of social marketing. Effective social marketing interventions will also target a range of audiences.

To achieve a broad reach, effective social marketing interventions have used a coordinated approach across government, industry and voluntary sectors. Strong partnerships between agencies have been considered essential for success. This is backed up by learnings from other social marketing interventions, such as *Like Minds Like Mine*<sup>5</sup>, which has demonstrated a strong partnership between the advertising agency and research companies, and both the *Quit Campaign*<sup>6</sup> and *Like Minds Like Mine*, which have demonstrated the importance of a national overview that supports local community-based service delivery. Effective features of the *One Heart Many Lives*<sup>7</sup> intervention have included partnerships with community figures and community organisations. The *Quit Campaign* also benefited from the personal nature of the helpline by using trained counsellors, and the fact that the counsellors' work was further reinforced by environmental shifts, such as law and price changes.

Many of the effective social marketing interventions were notable for their development of appropriate messages for specific target groups. Culturally tailored social marketing interventions that include community control, community participation and leadership are critical for effectiveness. For example, the *Like Minds Like Mine* campaign had strong partnerships with mental health service users and providers, and paid specific attention to Maori and Pacific peoples.

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<sup>5</sup> *Like Minds Like Mine* is a social marketing campaign to improve public attitudes toward mental health problems and to reduce discrimination related to mental illness.

<sup>6</sup> *Quit Campaign* is a social marketing campaign to support cessation of tobacco smoking.

<sup>7</sup> *One Heart Many Lives* is a social marketing campaign to reduce heart disease.



A report for Counties Manukau District Health Board (Sheehan 2005) analysed four social marketing interventions: the *Quit Campaign*, *Like Minds Like Mine*, *Push Play*<sup>8</sup> and *One Heart Many Lives*. The findings for two of these campaigns are summarised below.

### ***Quit Campaign***

A smoking cessation campaign has been underway in New Zealand since 1999. It uses media to encourage people who smoke to quit, and to promote the *Quitline* free phone service. The priority audience is smokers aged 25–44 years, in particular Maori.

Several lessons have been learned from the experience of this intervention. Although the advertising message is not positive, the intervention has contributed to the reduced social acceptability of smoking, and the *threat* nature of the advertisements is thought to have encouraged behavioural change. It is also important to note, however, that the shifts in public perceptions and behaviour have been assisted by law changes and the increased price of tobacco.

In addition, a key component of the strategy is the personal nature of the helpline, using trained counsellors. This means that the history of callers can be reviewed and the impact of such advertisements can be assessed immediately. Campaign infrastructure continues to monitor the efficacy of the advertisements in the market, so that its impact can be further refined and targeted.

### ***Like Minds Like Mine***

This ongoing mass media campaign has been underway since the late 1990s. Its purpose is to reduce stigma and discrimination by raising awareness and understanding of mental illness. It is a highly visible and well-resourced campaign, whose message is mainly delivered through television advertisements, but also through public health and community providers.

A key lesson from the campaign includes the importance of research and evaluation. A survey is conducted biannually to assess attitudinal changes towards mental illness. Information from this is then used to modify and further target the campaign. There has been particular evaluation of the programme's impact on Maori and Pacific peoples. The campaign's success is attributed to a strong partnership between the advertising agency and the research companies.

The campaign has been effective in integrating the perspectives of mental health service users into the programme. Another success factor is the tandem approach, with national-level television advertisements reinforced by regional providers.

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<sup>8</sup> *Push Play* is a social marketing campaign to increase public awareness of the importance of physical activity.

### ***Key findings***

The main lessons for social marketing highlighted by the Counties Manukau report were:

- Permanent, large-scale behavioural change is best achieved through changing community norms, which can take generations. There is consequently a need for continuous iteration of social marketing programmes.
- Relationship development and maintenance with key community figures and organisations is an important factor in securing long-term efficacy.
- It is important to establish personal relevancy (an emotive connection) and to initiate people to take the desired action.
- It is important to increase people's readiness for change or at least to consider change.
- The use of community groups is critical in achieving changes.

The report also emphasised the importance of formative research, and ongoing monitoring and evaluation, as well as the need for workforce development to support social marketing interventions.

### **A3.2 Lessons from social marketing with Maori and Pacific peoples**

It is widely accepted that in order to be successful, behavioural change initiatives for Maori must be grounded within a framework that makes sense to Maori and incorporates Maori values. The same is true of initiatives for Pacific communities, and other cultural groups. Assuming Maori and Pacific communities would be key partners and key audiences in the proposed historic heritage social marketing intervention, culturally specific understandings of historic heritage and wellbeing need to inform the planning of the programme.

Some key lessons about the impact of social marketing on Maori and Pacific communities can be drawn from the report for Counties Manukau District Health Board discussed above (Sheehan 2005). It was found that programmes with comprehensive, integrated approaches that employed multiple intervention strategies and communication channels were most likely to be effective. For example, a comprehensive campaign might both raise public awareness and address environmental barriers to change. To achieve a broad reach, effective social marketing interventions used a coordinated approach across government, industry and voluntary sectors. This allowed a national overview to be presented that was supported by coordinated local action. Strong partnerships between agencies were considered essential for success within many of the included studies, even though it was considered resource intensive to develop these.

A social marketing intervention is likely to be most effective for both Maori and Pacific people when it includes the key prerequisites for effectiveness—leadership and civil readiness (Sheehan 2005). Other factors that are important for these population groups are similar to the general bullet points in section A3.1, such as personal relevance, targeting those who have a reason to care, and use of community groups to support behavioural change efforts (Sheehan 2005).

***How can we increase the value of historic heritage to the New Zealand public?***

*The overarching purpose of the Department of Conservation is to increase the value that New Zealanders attribute to the conservation of natural and historic heritage. Research indicates that although New Zealanders perceive historic heritage as important, they tend to lack engagement with it. Therefore, this report outlines the development of goals, objectives and advice for designing and implementing a social marketing intervention to engage communities in historic heritage. This is the first known application of social marketing to the historic heritage area in New Zealand and internationally.*

Thornley, L.; Waa, A. 2009: Increasing public engagement with historic heritage: a social marketing approach. *Science for Conservation* 294. 57 p.