Interpretation good practice guidance

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Interpretation is the way we communicate stories and ideas about heritage to different audiences. It plays a critical role in helping visitors engage with our heritage – intellectually and emotionally.

By reading this guidance you'll learn about interpretation planning and how to create an interpretation plan. It includes examples of interpretation tools and techniques, advice on making your interpretation accessible, example costs and timelines, plus case studies and links to further information.

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About interpretation

Interpretation involves turning information into something accessible, relevant and engaging. It can take many different forms, from trails, audio descriptions and films to workshops, interactivities and online displays.

Interpretation should deepen people’s understanding of heritage and encourage them to think for themselves, reflect and learn. It helps people explore and make sense of historic sites and landscapes, objects, traditions and events.

It goes further than communicating messages. It involves designing a wider experience that helps visitors engage with heritage and notice and explore things they might otherwise not.

Interpretation can help people share their history and perspectives, especially where they have been excluded in the past, and lead to greater empathy and cohesion.

The best interpretation makes visitors feel engaged and empowered, on both an intellectual and emotional level.

The way you interpret heritage through your project can also contribute to our investment principles.

Meanwhile, **reinterpretation** is about actively changing the kind of information and ideas shared with visitors. It involves telling the stories of a more diverse range of people and exploring different experiences or views of our complex heritage.

Interpretation planning

Your approach to interpretation (and reinterpretation) should begin with interpretation planning.

A good interpretation plan will give structure to your project with clear aims, objectives and methods. It should be scaled to the size of the project, whether a single exhibit or a whole landscape.

You’ll use your interpretation plan alongside other documents (for example, conservation and activity plans) during the project planning and delivery phase and for benchmarking during project evaluation.

Remember to review your interpretation plan regularly to ensure your approach works for your target audiences.

What to include in an interpretation plan

Broadly, it should include what you want to interpret, who your audience is and the tools you will use to communicate with your audience. It will typically consist of:

- title of project
- overarching theme (summed up in one or two sentences)
- your aims – what you want your interpretation to achieve
- target audiences (existing and new)
- key messages – three to five essential facts which visitors need to understand
- learning outcomes – what you specifically want people to feel, learn and take away with them as a result of the interpretation
- who will be involved in developing the interpretation
- brief description of interpretation tools and techniques appropriate for your audience
- what the visitor experience will look and feel like
- what visitor testing is required – both formative to shape the approach to interpretation, and later, to evaluate the success of the interpretation

Understanding your audiences

The stories you tell and the way you communicate them should be designed specifically for your target audiences. The people you want to engage with are at the heart of interpretation, so who are they? At the outset, you should find out as much as possible about your target audiences. The more you know about their needs and interests, the more focused your interpretation will be.

We want projects we fund to remove barriers to access and participation, particularly for people who are under-served by heritage. We want to involve a more diverse range of people in heritage. Some projects might also involve developing deeper relationships with your existing audiences.

Remember, there's no such thing as a 'general' visitor. We are all individuals with specific interests and learning styles as well as our own preconceptions and levels of understanding.

Questions to ask to understand your audiences include:

- How much do we know about our target audiences, their interests and learning needs? What do they already know about the subject? How might we influence their understanding, skills, behaviour, attitudes and feelings about the subject?
- How could we involve target audiences with the content development? How might they influence or challenge our knowledge and preconceptions? Are there opportunities for visitor feedback and how will we respond?
- Whose perspectives are we conveying and how will visitors relate to these? Whose stories have been omitted and how can we include their voices? Can we challenge visitors to think in new ways or try new experiences?
- Does the physical space of our project help our audiences feel confident, safe and comfortable? How do we maximise access for disabled people? Who are we failing to engage and how can we remove barriers to make them feel welcome and included?

Your answers will help reveal where more research is needed. Review them regularly to see how they change as your understanding develops.

Visitor surveys

Visitor surveys will give you an accurate profile of your existing audiences, including:

- who they are
- what interests they have
- where they live

More in-depth research will improve your understanding of under-served visitors and help you to identify new target audiences. A range of methods can be used to build up a clear picture of visitors and some links are included in the information section below.

Getting the message right

The big idea

What's your big idea? It's not always easy to untangle a complex history with multiple perspectives. The first step is to boil it down into one big idea or theme which will tie the project together.

This step will give focus to your project, especially when you have a lot of knowledge to share. The overarching theme can be divided into a small number of sub-themes, but each should support and focus on the big idea.

Key messages

Devise three to five key messages or facts which visitors should easily understand. Your interpretation can be used to reinforce these messages in different ways to suit different audiences and learning styles.

Inclusive content

Many stories have historically been told from one perspective. Allow enough time to research different content and stories and work with the communities involved (for more on this see our inclusion good practice guidance).

Your research might lead to less obvious places, for example to court and legal records when researching sexuality and gender identity histories.

You may find it difficult to find evidence to fill gaps, so interpretation tools, such as artists' commissions or dramatic re-enactments, might be useful to bring life to stories.

Telling your story through a broad range of lenses will make it accessible to more audiences. For example, when interpreting places of worship, consider interpretation that is inclusive to audiences of different faiths and non-religious audiences. Explain specific religious terms and draw comparisons or contrasts with other faiths, where appropriate.

Dwell time

To help you plan the amount and type of interpretation required, estimate the approximate time visitors are expected to spend engaging with your project or place. It should allow for the length of audio-visual (AV) presentations, average reading speeds and time spent on interactivities. Well-planned interpretation should engage both those who like to read everything as well as those with short attention spans.

Writing clear and accessible text

Reading is an important life-skill and heritage projects provide an ideal environment to practice literacy skills. Well-written text with a clear narrative and uncomplicated sentence structures will help your project communicate with a wider audience.

You can still use technical terms or unusual words, but you need to explain their meaning and give them context. It's possible to convey relatively complex subjects within a limited number of words, although it might take time, practice and feedback to get the words right. Ask a non-specialist to read your draft text to check it is clear and easy to understand.

Layering information

The best news articles layer information. They start with the most important messages conveyed in headlines and opening paragraphs, followed by more in-depth information below. Use this approach when writing text or planning other forms of heritage interpretation.

A top-level text panel should be around 100 words and an object label should be about 60 words at most.

Fact-checking and relevance

Make sure you check all interpretation and text for factual accuracy and for grammar, punctuation and consistent spelling. Allow plenty of time for proofreading and editing as mistakes can be costly to correct later.

Interpretation tools and techniques

You should use a range of tools to appeal to different audiences. Telling your story in multiple ways allows visitors to engage with the content of your project or heritage place on their own terms and at their own speed. Think about what's right for your location and make sure the tools you choose are informed by audience research.

Once your interpretation tools have been agreed, you will need to develop your ideas so they can be costed and produced. If you are using designers or specialist makers to work on your interpretation, they will need detailed briefs.

Graphic panels

These usually consist of text, diagrams, photos, illustrations and other images. They are most suited to those who enjoy learning through reading. They are relatively cheap to produce and can be used indoors and outdoors to convey a large amount of information, but it's important not to overload visitors by writing too much text.

Low-tech interactive elements:

- lift-up flaps
- tactile plaques
- dressing-up
- jigsaws and other hands-on displays

They are suitable for sensory learning and can be popular with families and school groups.

Digital media:

- apps
- computer-based games
- digital interactives and virtual reality presentations
- audio listening posts and audio-visual presentations

Digital media can convey a large amount of information relatively quickly and provide a more immersive visitor experience. It can also be used to provide alternative access to sites that may be physically difficult to access by people with mobility impairments.

Tools to support visitors with sight difficulties:

- braille
- tactile images and maps
- touchable installations
- large-print guides
- handling objects

These tools enhance the experience of visitors with sight difficulties, making their visit more engaging and allowing greater independence. Handling objects also extend the sensory experience for sighted visitors.

Live interpretation:

- guided walks and tours
- demonstrations and costumed actors
- foreign-language tours
- touch tours, British Sign Language (BSL) and audio-described tours
- art performances, dance, song and poetry readings

These forms of interpretation offer a responsive, tailored experience via direct contact with audiences. Staff and volunteers can be trained to give presentations that are targeted at hearing or visually impaired visitors.

Staff might wear a lapel badge of a national flag to indicate they can speak a language other than English.

Touch tours allow visually impaired visitors to feel exhibits which might normally be protected behind barriers or glass.

Print-based media:

- books

- leaflets
- family trails
- activity sheets

These add another layer of information and aid orientation.

Guidebooks and catalogues can generate revenue and provide a take-home memento. Family trails and activity sheets can encourage visitors to explore further.

Visitors can be encouraged to visit the shop by handing in their completed activity sheets for a gift or voucher to use in the café.

Maps, timelines and infographics

These offer a concise way to convey a lot of information. They are particularly suited to visitors with a visual learning style.

Web-based interpretation:

- online talks
- exhibitions
- activities
- downloadable material such as podcasts, audio tours, maps and activities

Web-based interpretation is an excellent offer for distance learners. It also enables heritage and cultural organisations to develop and maintain contact with audiences when physical visits are not possible.

Websites are vital for pre- and post-visit information and activities. They set the scene and can reach a wide audience, including those who live abroad.

Personal devices

Visitors can use their personal devices to access:

- QR codes
- apps
- downloadable information
- social media campaigns

Digital tools provide an excellent way to offer additional layers of information. Social media campaigns with specific hashtags have the potential to increase engagement and communication with audiences who use social media. But be aware that smart phones are not universal and internet coverage may be patchy, so some people may be excluded.

Artists and creative practitioners:

- artistic interpretations and interventions
- creative residencies and workshops

- storytelling and traditional craft demonstrations

This offers another way to provide a responsive, tailored experience via direct contact with audiences.

By commissioning artists and other creative practitioners (such as poets, photographers, choreographers, etc) you are also able to create content which offers alternative perspectives and helps to fill gaps in your knowledge. Storytelling and traditional crafts also offer a way to share intangible cultural heritage or bring objects to life.

Digital interpretation considerations

Digital interpretation can be used to communicate with visitors at heritage sites or as a way of bringing heritage to people remotely. As with all interpretation, it is important to work out which interpretation tools will best communicate your key messages to the target audience.

Low-tech vs high-tech

Low-tech physical interpretation tools can often be as effective as high-tech. Consider value for money, futureproofing with flexible or reusable tools and ongoing maintenance needs.

Ease of use and cost

Social media, online talks and websites can be fairly easy to use and organise. However, some digital media can be expensive to design, produce and maintain. It can also quickly feel dated – especially in comparison to cutting-edge gaming technology and virtual reality which some people have at home.

Integration

Think about how digital interpretation might work with other interpretation as part of a visitor's wider experience in person and/or online.

Inclusion

Remember that not all people have access to smart phones or other devices and may be excluded from using digital interpretation. In this case, you may want to think about other ways of bringing heritage and interpretation to people in places that they might go to beyond the heritage site.

For further advice, please refer to our digital good practice guidance.

Bilingual or multilingual interpretation

All interpretation funded in Wales must be bilingual Welsh and English. See our Welsh bilingual project good practice guidance for more information.

This approach may also be appropriate for other local languages, for example in Gaelic-speaking parts of Scotland or for reaching a community that does not speak English as their first language. Use a translator who regularly speaks both languages to ensure that the translation is colloquial rather than literal.

A bilingual graphic panel or leaflet should be carefully designed to accommodate both languages. Audio and multimedia presentations can provide full bilingual and multilingual versions from the same piece of equipment.

Accessible interpretation

By ‘accessible’, we mean the extent to which a project or place can be used and engaged with by its audiences. Under the Equality Act 2010, it is unlawful for service providers to treat disabled people less favourably than others. This includes organisations managing heritage sites that are open to the public.

You must make ‘reasonable adjustments’ to the way you deliver your services so that disabled people can use them. This means that any interpretation should consider the needs of disabled people.

Barriers to access

Barriers to access are often associated with disabilities but they can also be due to age limits, language, financial or time constraints.

An access audit will identify potential barriers to physical and intellectual access. The next step is to consider how interpretation can be used to remove or adjust these barriers to ensure the experience is enhanced and fully accessible.

Your interpretation should cover a range of learning styles and it should also be tested for suitability with a range of different audiences.

Using interpretation to eliminate barriers to access:

- Provide information in **a variety of formats** to suit a range of learning styles.
- Write text in plain English. Follow best practice guidelines to **make text legible** and a size that is easy to read. A minimum type size of 18–36pt is suitable for the body text of most exhibition object labels.
- Ensure there is a **good colour contrast** between the text and background and do a test print to check legibility with target audiences.
- **Large-print versions** of labels and descriptive tours should be available for visually impaired people.
- If using audio, **limit other background sound** so that people can hear properly. The use of audio and AV with hearing loops, subtitles, BSL interpretation, transcripts and time bars should all be considered.
- Install displays, interactives and labels at a **height** that children and wheelchair users can use. Small or detailed objects and main text should be positioned within a narrow band of 1,200–1,600mm above the floor level.
- Provide a range of **seating** (with and without armrests) so that people can either rest or access the interpretation in comfort.
- Consider **concessions or free-entry days** for those on a low income.
- **Stagger the timing** of events and live interpretation to allow people with time-related commitments to attend – for example, for those who work nightshifts or weekends.
- Provide **disability awareness training** for all staff and volunteers.

Who you should involve in interpretation planning

Best practice is to involve target audiences, host communities and possibly interpretation consultants in interpretation planning.

Consulting target audiences

At the very least you should consult target audiences to inform your interpretation plan. For example, you could use focus groups, workshops or public meetings to discuss the significance and meaning of your heritage project and to invite thoughts and contributions.

You should also test your ideas for interpretation tools and incorporate findings into your interpretation plan and design briefs.

Community engagement

Active community participation instils a greater sense of ownership and belonging. It is particularly important to involve people in telling missing stories about their communities.

From the outset, you should identify opportunities for community participation. Consider how much control your organisation would need to retain over the final output. The more control you are willing to relinquish to your community groups, the more empowered they will feel to make interpretation their own. Successful participation generally involves people or communities as equal partners, involved throughout the project and paid for their time.

You can also involve people in the local community in developing content for your heritage project, for example by:

- undertaking oral history interviews to prepare scripts or quotes for interpretive panels
- issuing a call for photographs and illustrations to use in interpretation
- developing arts projects and cultural activities to generate content to incorporate into your interpretation, for example by commissioning an artist to work with school groups to create a mosaic about a Roman heritage site
- establishing community and youth advisory groups, academic panels, etc, to develop ideas and provide feedback on accuracy and relevance
- working with community curators or research participants to generate new content

Working with interpretation consultants

You could consider bringing in specialist support to advise on interpretation. This is particularly relevant if you are developing a large-scale interpretation project and you need additional expertise to compile an interpretation plan.

You might consider commissioning an independent interpretation specialist to work with your team. Being independent will mean they will take an objective view of all the issues, helping you develop cost-effective solutions to suit your needs and those of your audiences.

You might also need to use designers for spatial layouts or graphics to help you visualise your ideas. Other roles that could help to deliver your interpretation might include:

- project manager
- curator
- scriptwriter

- text editor
- model maker
- access consultant
- visitor research consultant
- photographer
- learning and community outreach specialists
- software designer (for apps, interactives, virtual reality and touchscreen games)
- AV hardware consultant

Ask for recommendations from local heritage attractions and appoint consultants with an established track record and whose ideas you like.

Cost planning

When your interpretation plan has been compiled and briefs written for specific interpretation elements, you should approach several contractors to obtain estimates and quotes.

Interpretation costs typically fall under the following headings:

- interpretation consultants or staff training to deliver the project
- design services and production to create interpretation tools
- hardware and fit-out costs
- visitor evaluation, testing and participation
- on-going operation, supplies and maintenance

Rough cost estimates

The following guidelines may help you calculate exhibition fit-out costs in an existing space. They may be used as a very rough estimate for ballpark figures before specific briefs are developed and costed.

Low specification display without showcases (or reusing existing cases), mainly graphic panels, mix of new and stock lighting, no AV or interactives, simple setworks and furniture. Allow £1,000 per m^2.

Medium specification display including some museum-grade showcases alternating with perspex covers, lighting, simple AV and/or interactives, graphics, simple setworks and furniture with some higher spec moments, mounts and accessories. Allow £2,500 per m^2.

High specification display including museum-grade showcases, AV and/or interactives, lighting, graphics, setworks and furniture with higher specifications, framing, mounts, and accessories. Allow £4,000 per m^2.

Please note these figures are correct at the time of publication and do not include project management, design, consultancy fees or visitor testing. They should be used purely for guidance. Many fantastic interpretation projects are devised on a shoestring, while the sky can be the limit for cutting-edge digital interpretation.

The important thing is to be realistic, prioritise, compile detailed briefs and seek a number of comparable quotes from reputable sources to refine the budget.

Other cost considerations

Staff and volunteer costs

You should undertake a skills audit of your staff and volunteers to help identify gaps that should be filled by recruitment, training, freelancers or contractors.

An independent interpretation consultant will cost between £250–£450 per day, depending on the scope of the project, their location and level of experience.

Don’t forget volunteer expenses or transport and refreshments when working with community groups. You may wish to draw up a policy for covering such expenses so everyone is clear about what to expect.

Design, content and display costs

When calculating 3D and 2D design costs, allow around 15-20% of the production and fit-out costs.

When recording, filming and editing audio or AV formats, there may be additional fees for actors, sound effects/soundtrack, costume hire, reproduction permissions, etc.

License and reproduction fees for using copyrighted images, Ordnance Survey maps, photographs, music, etc, can soon add up. Aim to source as many pieces as possible from the same organisation to negotiate a potential fee reduction.

Your local planning authority can advise if planning permission is required for outdoor panels or audio posts, etc.

Summary timelines for large project interpretation

The following guidelines provide an overview of when and how interpretation planning should fit into the project development stages for large projects. It provides a useful tool for projects of all sizes.

Please note that some of these tasks can shift or be combined, depending on your overall project scope and timeframe.

Pre-application

Project definition (RIBA stage 0–1):

Write a project initiation document (PID) summarising the scope and ambitions of the project, including details such as location, resources available (time, money, people), stakeholder expectations, access issues and measures of success. This is normally compiled by the project manager in liaison with the steering group.

If required, write a brief to appoint an independent interpretation consultant who will work with your team to:

- identify the big idea (theme) and three to five key messages which describe it succinctly
- identify key objects or assets which communicate your idea
- compile target audience (existing and new) information and identify where more research is needed

Undertake formative visitor evaluation to inform the interpretation plan and design briefs.

Development round application

Concept design (RIBA stage 2):

Devise an interpretation plan that is aligned to your organisation's vision and objectives with developed sub-themes and key messages. This will be used to guide the design development. For bigger projects that involve heritage sites and collections, it can form part of a much wider interpretation strategy that is aligned to the vision and values of your organisation.

With the design team, develop the concept for the visitor experience, describing narrative flow, visitor route and 'look and feel'.

Further steps:

- identify and scope any community participation in the project
- compile interpretation briefs for specific interpretation tools to guide the design development
- appoint 3D, 2D and AV designers
- The project manager and quantity surveyor will check the concept design against the budget and undertake value engineering with the design team, if required.

Development review

Scheme design (RIBA stage 3):

- With the design team, develop and refine the visitor experience. Create a walk-through, describing exhibits, techniques and treatments with design visuals and text.
- Review the 3D design against the interpretation plan and check for synergy.
- With the 2D designer and interpretation consultant, agree the text hierarchy and word counts.
- Compile sample text for 2D concept designs including, where relevant, bilingual text.
- Appoint a consultant to undertake an access audit of your scheme design and make revisions where necessary.
- Commence community participation projects and agree how outputs will be incorporated into the 3D design.
- Test scheme design with target audiences and make any revisions needed.
- Review scheme design against the budget and undertake value engineering with the design team if required.

Delivery round application

Final/detail design (RIBA stage 4):

- The design team will develop detailed designs for tender, including material sample boards and the graphic hierarchy.
- write final briefs for audio/AV sub-consultants and tender
- write final text and test with target audiences
- undertake picture and film research and obtain permissions for use

- The project manager and quantity surveyor will review final designs against the budget and undertake value engineering with the design team, if required.

Production/tender (RIBA stage 5):

- Design team will prepare the final tender package, including specifications for interpretation tools which may require specialist contractors.
- appoint contractors and sub-contractors to build and install the project
- The project manager will review costs as tenders are received with the design team and quantity surveyor.
- With the project manager, approve the final artwork to ensure interpretation tools are as planned.
- review mock-ups and test prototypes with audiences

Fabrication and installation (RIBA stage 6–7):

- The project manager will coordinate the work of contractors and sub-contractors.
- Liaise with the project manager to review interpretation tools during production and installation to identify potential snags.
- Project handover – contractors will provide staff training and issue maintenance manuals for all exhibits and interpretation tools.
- undertake summative audience evaluation

Case studies and other sources of advice and information

Projects under £250,000

- Steel Stories brought together generations of people across Teesside, from those sharing first-hand stories to apprentices creating exhibition centrepieces. It won the Best Small Museum Award for its co-curated project.
- Queering Spires shared the untold stories of hidden queer spaces in Oxford. The Museum of Oxford wanted to avoid the waste often generated by temporary exhibitions and ensure its procurement practices were socially and environmentally responsible. It won the Sustainable Project of the Year Award at the Museums + Heritage Awards 2020.
- A History of Place, covering eight sites across England, was led by disabled people, with disabled people informing every aspect of development including approaches to interpretation.
- Norfolk Archives in partnership with Together involved people with lived experience of mental health conditions. The Change Minds project used creative writing, painting and textiles workshops that resulted in a high-quality public exhibition in Norwich Central Library.

Projects over £250,000

- Our Shared Cultural Heritage is part of a much larger project led by and for young people with South Asian heritage. It includes a range of cultural theory, creative ideas, critical thinking and discussion.
- At Shire Hall, Dorset, visitors go on a journey through a series of galleries and historical spaces, including cells, docks and a historic courtroom. The interpretation team created a multi-sensory experience that brought the past to life.

- Visitors to Tropical Ravine, Belfast, learn about the conservation work and plant collection through interactive and digital exhibits. Accessibility has been improved with sensory facilities for sight and hearing-impaired visitors.
- The National Maritime Museum in London devised structured involvement for a range of community partners to develop co-curated stories for the Endeavour Galleries. At the opening, the Pacific community was invited to perform blessing ceremonies for sacred objects which were on display.
- St Fagans National Museum of History, Wales, includes bilingual interpretation and produced a dementia-friendly exhibit by reinterpreting an existing historical building. It was the winner of the Art Fund Museum of the Year in 2019.

Organisations that offer interpretation resources:

- Association for Heritage Interpretation
- Interpret Scotland
- Museums Association
- Sensory Trust
- Royal National Institute of Blind People (RNIB)
- The Visitor Studies Group

Free online publications

Interpretive planning:

- A Sense of Place: An interpretive planning handbook, James Carter (ed), Tourism and the Environment Initiative, 1997
- Museums Galleries Scotland's Introduction to Interpretation, Everything Speaks, National Trust

Outdoor interpretation:

- Brecon Beacons National Park: Community walking and interpretation toolkit
- Woodland Trust: Ancient woodland restoration interpretation toolkit
- The Canal and River Trust: Interpretation toolkit

Equality legislation:

- Equality and Human Rights Commission
- UK Legislation

Participation:

- The Participatory Museum, Nina Simon, 2010

Access:

- Collections Trust: Access for all Toolkit
- National Museums of Scotland: Exhibitions for All: A practical guide to designing inclusive exhibitions

- RNIB: Tactile Images, Maps and Touch Installations
- Vocal Eyes: Accessibility resources for museums, galleries and heritage sites

Accessible text writing guidance:

- National Literacy Trust
- V&A: Gallery Text Writing Guidelines