



Futures discussion paper to The Reid Review: **National Trust for Scotland**

Background

As an Associate Member of Scotland's Futures Forum, the National Trust for Scotland asked the Forum to work with their Members and staff to help provide a futures perspective to the Reid Review. The work was carried out between January 2010 and March 2010. It involved running 2 café conversations at the Scottish Parliament with 135 delegates and a driver workshop with 10 sectoral experts. This short report provides a summary of the work undertaken by the Forum.

Introduction

The Forum was asked to i) undertake a base research paper on trends in Scotland's culture sector; ii) conduct two futures-based conversation cafes iii) facilitate 1 drivers for change workshops with technical experts.

On Monday 25 January 2010, Scotland's Futures Forum and National Trust Scotland hosted a seminar on the future of the heritage sector in Scotland.

The seminar posed two main questions to participants:

- How should Scotland positively look after our heritage for the future?
 - How can we ensure a secure and sustainable future for the National Trust for Scotland (NTS)?
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Format

This short report is split between the learning to emerge from the discussion Forums (part I) and the futures perspective (part II).

Part 1

What are the main issues facing the National Trust for Scotland's Future (NTS)?

Finance

The lack of financial viability was the primary concern, given NTS's low income compared with the cost of maintaining its properties. There is clearly concern about the impact of the recession and NTS's ability to sustain levels of voluntary income in the coming years.

Governance

Concern has also been expressed about NTS's governance structures and corporate culture. There is currently a great deal of mistrust between management and staff, and a sense that there are multiple 'cliques and cabals' who are capable of overturning decisions taken at management level. Staff morale is low.

Public perception

With the recent adverse publicity the NTS has experienced, it is felt that the organisation suffers from a poor public perception. The magazine should, for example, be more professional looking.

Membership

Consequently, there is also concern about the morale of NTS members. It was felt that there is a great deal of goodwill amongst members but that NTS had not adequately capitalised on this and that it was at risk of being eroded if members were not brought back into the fold.

Trustee for the nation

There is a perception that in the past, NTS had 'taken on too much' and taken on properties that had ended up as a drain on resources. However, it should also be recognised that individuals bequeathed properties for NTS to retain in perpetuity and legislation would be required if NTS was to decide to sell off any properties in the future.

What are the short and medium term actions that must be taken if NTS is to be sustainable in the future?

Finance

The key priority identified must be to achieve financial viability.

NTS's properties should be categorised, based both on their importance from a heritage point of view and on their ability to generate income. Alternative business and management models should be considered for properties that have struggled to balance the books in the past and NTS should consider selling off properties that have been a perpetual drain on resources.

It was accepted that this would require legislative change.

NTS should look at sharing back office services with the other heritage bodies to make savings. This would not involve merging but, sharing costs where appropriate was felt to be doubly important given the harsh economic climate and likely dwindling of levels of voluntary income.

Governance

NTS's Byzantine governance structures have to be reformed. There should be a separate board and management structure and that staff members should not sit on the Board. Nor should strategic priorities be set by the AGM.

There needed to be greater transparency from the centre and clear strategic direction in the form of a corporate plan.

Public Perception

All stakeholders had a role to play in helping to restore the image and credibility of NTS and that there was a need for strong, positive PR.

Membership

NTS has to improve its marketing to members and potential members, and that it should better engage young people for its future membership.

Management should also reach out to the membership both to communicate the realities of the current situation but also to tap into the support of its members. However, NTS could only ask members for money if we can convince them that NTS is 'leaner and meaner' – a difficult challenge given recent adverse publicity.

What are the main ideas to feed into the strategic review?

Specific suggestions to emerge:

- Reduce the size of the Council
- Develop a proper corporate plan
- Staff suggestion scheme
- Members' suggestion scheme
- Review and improve merchandising
- Increase the use of trained volunteers
- Build up marketing and PR functions
- Consider a bonus system for property managers
- Make more use of local members' groups
- Draw more on the resources of the Scottish diaspora

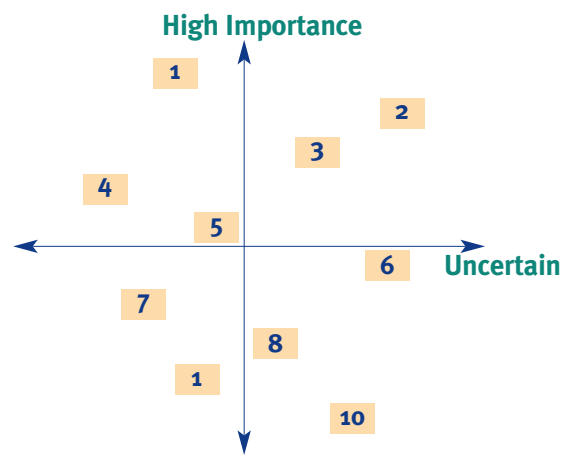
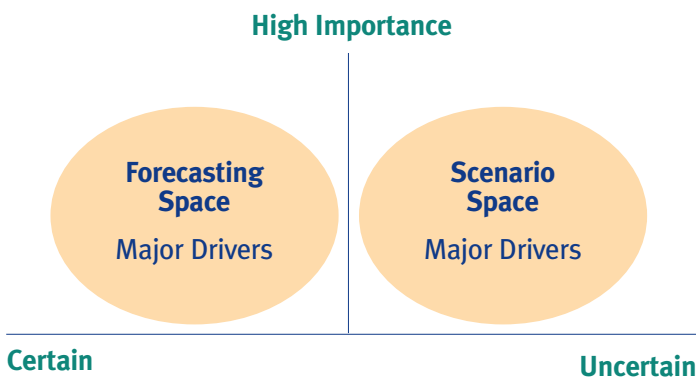
Part 2

A futures View:

Nobody can predict the future; many have tried over the years but few have succeeded. We know that the future is uncertain. However, it is possible to look at trends and forecasts and take a view of some of the more likely drivers of change which may impact on the heritage sector.

Definitions

A small team of sectoral experts considered what they believed were the most important drivers for change which would impact upon NTS in the coming 5 years. The exercise was designed to highlight and rank key drivers for change, as follows:

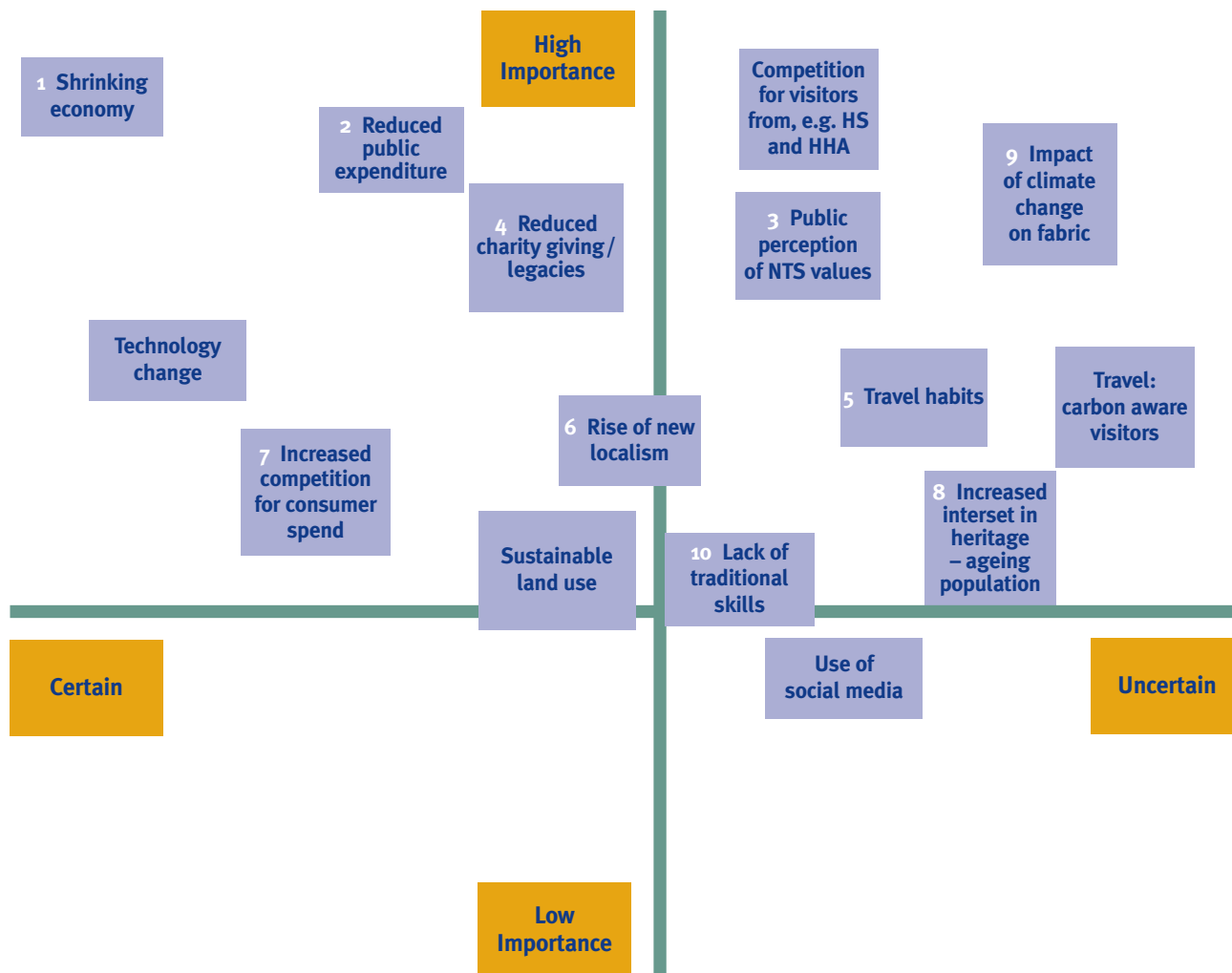


The expert group decided upon the following drivers. The group ranked the drivers from one to ten.

- Economics/Shrinking economy/less consumer spend
- Public perception of NTS values
- Charity giving/legacies
- Reduced public expenditure
- New localism
- Commercial/external competition for consumer spend
- Attitudes/Popular culture/increased interest in heritage
- Climate change – fabric and maintenance
- Climate change “green” targets
- Fast moving Fast moving technology
- Social media
- Extended family make up/ cohesion
- Sustainable land use
- Ageing population/demographic change
- Preservation
- Lack of traditional skills to maintain property infrastructure
- Technology



The group then consider each of the driver along an axis of certainty. Two clear clusters emerged i) high importance and certain – Forecast space and ii) high importance and uncertain – scenario space.



In reflecting on this exercise The Forum confirms the key drivers in the ‘forecast’ area mirror those identified in the café conversation. These are primary issues (finance, governance, legislation, localism, legacies etc) facing the **National Trust for Scotland** in the next 5 years, being taken forward through the Reid Review. The Forum has also looked at some of the drivers from the scenario space facing the **heritage sector more generally** and below is an overview which I hope is helpful to the Reid Review in testing assumptions. These issues are: **Age**; **Benefits**; **Competition**; **Disabilities**; **Economic issues**; **Limited number of visits**; **Not interested**; and **Other challenges**. The table provided then cross references these issues with other, associated, matters. Namely: Cultural and heritage tourism; Climate change / weather; Travel; Demographics; Conservation; and Entrance costs.

	Cultural and heritage tourism	Climate change / weather	Travel	Demographics	Conservation	Entrance costs
AGE	<p>The aging population have the time and disposable income to travel. They also interested in gaining knowledge.</p>		<p>Although only small percentages of respondents stated lack of transport as a reason for not visiting historic or archaeological sites, this response was more prevalent amongst those in the youngest and oldest age groups.</p> <p>Lack of transport is cited by one in ten (11%) of the young people surveyed in <i>Children's Participation in Culture and Sport</i> as an explanation for not visiting sites</p>	<p>Statistics in the <i>People and Culture in Scotland</i> 2008 chapter 6 show that group over 75 years old visited significantly less historic or archaeological sites than any other age group. The main reason is due to health reasons.</p> <p>People between 25 and 44 more likely to visit.</p> <p>Few heritage organisations in Scotland collect any separable hard data on the level of attendance or event participation by 16 – 24 year olds.</p> <p>Attendance by young adults at historic environment sites and events is particularly difficult to assess as there is a marked lack of uniformity in the age classifications used in heritage and museum site visitor surveys.</p>		

	Cultural and heritage tourism	Climate change / weather	Travel	Demographics	Conservation	Entrance costs	
BENEFITS	<p>Heritage-Led Regeneration: historic places attract people, activity and investment, giving new life to their communities and helping make places more competitive. They play a central role in regenerating towns, cities and rural areas</p> <p>Cultural heritage such as historic landmarks can help the country to compete with other tourism destinations by provides a differentiating offer from the beach holidays or other citybreaks where there are fewer historic assets.</p> <p>New dedicated heritage area at VisitScotland's EXPO trade show.</p>	<p>As people become more aware of their carbon footprint they will be also be checking out the green credentials of the sites they plan to visit.</p> <p>Businesses opting to join the Green Tourism Business Scheme are assessed against a rigorous set of criteria, including a range of areas, such as energy and water efficiency, waste management and biodiversity.</p>				<p>The Visitor Economy can provide a source of income which is needed to cover the continuing costs of conservation and renewal of these cultural and natural assets – which form Britain's heritage – to assure the long term future of the resource. Spend by tourists can contribute to the upkeep, maintenance and renewal of many heritage sites.</p>	
COMPETITION	<p>Different organisations in the same field: National Trust for Scotland Historic Scotland & Historic Houses Association</p>		<p>No evidence of linked travel</p>				
DISABILITIES				<p>Statistics in the People and Culture in Scotland 2008 show that groups noticeably less likely to have visited a site in the last 12 months included those with long-term illness or disability</p>			

ECONOMIC ISSUES

	Cultural and heritage tourism	Climate change / weather	Travel	Demographics	Conservation	Entrance costs
	<p>The decrease in the strength of the pound against the euro means for UK tourists the notion of going for a cheap holiday in Europe is disappearing.</p> <p>The finding that those who come from the most deprived areas who had visited historical sites were the most likely group to say they wanted to visit more would suggest that there are groups with untapped potential who might respond to promotion of historical sites. As those from these areas are also less likely to own a car this would suggest that campaigns to promote interest should also consider provision of transport. Coach trips might be one way of providing this in a targeted way.</p> <p>A large minority of lower income groups stated they would visit more often if there was cheaper admission; more information available about local sites and better public transport available. All these factors could conceivably be addressed and should be considered if underprivileged groups are to be encouraged to participate in this type of cultural activity.</p>		<p><i>People and Culture in Scotland</i> 2008 tables show that groups noticeably less likely to have visited a site in the last 12 months included those with no cars in the household. 73% of those visitors would like to visit more often.</p> <p>A large minority of lower income groups stated they would visit more often if there was better public transport. This could indicate a significant unmet demand from underprivileged groups which suggests that the reasons why these users do not visit more should be studied carefully.</p> <p>3% of respondents who did not visit sites said this was due to a lack of public transport or that the sites are difficult to access.</p> <p>Increasing oil prices, airlines imposing fuel surcharges to cover higher costs, leading to increased ticket prices, this will limit travelling during expensive periods.</p>	<p>Statistics in the <i>People and Culture in Scotland</i> 2008 chapter 6 show a clear positive relationship between SIMD (Scottish Index of Multiple Deprivation 2006) group and visits to historic or archaeological sites. 65% of those in the least deprived SIMD group had visited at least one site in the last 12 months, compared to only 37% of those in the most deprived SIMD group.</p> <p>Groups noticeably less likely to have visited a site in the last 12 months included those on Low incomes</p> <p>It is notable that the people who had visited from the most deprived SIMD group display the highest desire to visit more frequently of any SIMD group. Chart 6.8 shows that 74% of this group would like to visit historic or archaeological sites more frequently.</p>	<p>People are also becoming more aware of their carbon footprint and may want to decrease this by taking fewer flights.</p>	<p>4% of the respondents did not visit historic or archaeological sites said that it can cost too much.</p> <p>A large minority of lower income groups stated they would visit more often if there was cheaper admission,</p> <p>7% surveyed in Children's Participation in Culture and Sport perceived cost, lack of information, and not having anyone to go with are concerns.</p>

LIMITED NUMBER OF VISITS

	Cultural and heritage tourism	Climate change / weather	Travel	Demographics	Conservation	Entrance costs
LIMITED NUMBER OF VISITS	The dominant reason why upper income groups did not visit more frequently was because they do not have enough time	The heritage attraction sector has a shorter season than both Scottish tourism and other attractions. Many rural sites close entirely for the winter.	16% of respondents who did not visit historic or archaeological sites stated that it had never occurred to them to visit a historical or archaeological site. It would be interesting to ascertain whether respondents who stated that it had never occurred to them just need prompted to attend or whether it had not occurred to them because they are not interested.	People and Culture in Scotland 2008 chapter 6 shows that the majority of respondents who visited a monument in the past 12 months did so only once or twice a year. These results can be broadly applied to all the other sites being analysed with one exception, that respondents visited historic parks or gardens more frequently than the other sites. Two thirds of those who had visited historical or archaeological sites wanted to do so more often.		

NOT INTERESTED

NOT INTERESTED				According to the People and Culture in Scotland 2008 chapter 6 it is likely that there are groups of people who have never visited, that could be persuaded to participate. According to <i>Children's Participation in Culture and Sport</i> young people's reasons for not visiting historical or archaeological sites are primarily concerned with not being interested and having other things to do in their spare time (both 46%). Girls are particularly liable to mention a lack of interest (52%, compared with 41% of boys).		
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OTHER CHALLENGES

Cultural and heritage tourism	Climate change / weather	Travel	Demographics	Conservation	Entrance costs
<p>In their 2008 report the Scottish Parliament Economy, Energy and Tourism Committee were concerned that there is still too much evidence of institutional reluctance to change and, on occasion, in-fighting between public bodies, all to the disadvantage of improving support to the tourism industry.</p> <p>Examples of this include the reluctance of Historic Scotland to be more involved in the general marketing of Scottish tourism. They also wished to see the wider heritage sector (i.e. Historic Scotland, National Trust for Scotland, Historic Houses Association etc) working more closely with VisitScotland to lever increased marketing impacts through joint campaigns and actions.</p> <p>They also considered that there needs to be clear direction and buy-in from all public bodies towards a 'Team Scotland' approach. Tourism and selling Scotland has to be a national approach that enjoys unified support and proactive behaviour. Greater synergies in joint marketing at VisitScotland, Historic Scotland and other heritage bodies and at the local level offer the best option for maximising impacts at national and international levels.</p>	<p>Achieving a good carbon footprint for older buildings while maintaining their cultural significance</p>			<p>Lack of traditional skills, suitably-qualified craftsmen and locally available materials for the maintenance and repair of the historic environment.</p> <p>Lack of knowledge and understanding of how older buildings were constructed and perform and their maintenance needs</p>	

Sources

Association of Scottish Visitor Attractions

Centre for Tourism and Cultural Change (CTCC) at Leeds Metropolitan University

The Green Tourism Business Scheme: Businesses opting to join Green Tourism are assessed by a qualified grading advisor against a rigorous set of criteria, covering a range of areas, like energy and water efficiency, waste management, biodiversity and more.

Historic House Association Scotland

Historic Scotland

Institute of Historic Building Conservation: a professional body for building conservation practitioners and historic environment experts working in England, Northern Ireland, Scotland and Wales

Interpret Scotland

National Trust for Scotland

Prospects: the UK's official graduate careers website: Tourism: Overview

Scotland's History

Scotland's People: the official government source of genealogical data for Scotland

ScotlandsPlaces is a website that lets users search across different national databases using geographic location.

Scottish Tourism Forum The Forum is an independent trade body comprising trade associations, businesses, marketing and local area tourism groups

Sustainable tourism in Scotland: VisitScotland website

Tourism Innovation Group (TIG) brings together over 50 tourism businesses and support agencies with a mission to encourage growth and drive long-term strategic change in Scottish tourism through innovation.

Tourism Intelligence Scotland a new joint initiative on market intelligence developed by **Scottish Enterprise, Highlands and Islands Enterprise, and VisitScotland.**

Publications

Chamberlain, V., Sewel, K. and Braunholtz, S. (2008) *Children's Participation in Culture and Sport*

Deloitte. (2008) *The economic case for the visitor economy*. A report commissioned by VisitBritain and Tourism Alliance, which states that the UK tourism industry is worth just over £110 billion and employs more than 1.3 million people.

Duffy, M. (2008) *Historic homes fighting a stately decline* Herald 27 December 2008

HarrisInteractive. (2008) *The Visitor Experience 2008 Prepared For VisitScotland: Executive Summary*

HEACS. (2008) *Report and recommendations on the infrastructure of the historic environment* Presented to Linda Fabiani, MSP Minister for Europe, External Affairs and Culture December 2008

HEACS. (2009) *Report and recommendations on strategies for engaging young adults in the historic environment*

HEACS. *Papers delivered at the HEACS Annual Conference and Public Meeting*, Dynamic Earth, Edinburgh, 20 May 2009

Historic Properties Group. (2008) *Historic Properties: a Visit to the Future. Scotland's Historic Properties*. This guide draws together many of the key themes of the report: Future Trends in The Historic Properties Sector – March 2008.

Historic Scotland. (2009) *Scottish historic environment policy July 2009*

National Trust for Scotland. (2009) *Your Trust in Scotland: Annual review for 2008 – 09*

Scottish Government. (2009) *People and Culture in Scotland 2008 Results from the Scottish Household Survey Culture and Sport Module 2007/2008*. This report illustrates the findings on participation in, and attendance at, cultural activities and events, visits to cultural sites and places, barriers to participation and attendance, what would encourage people to participate or visit more often, and reasons why people do not participate or visit at all. The Module also looked at people's childhood experiences of culture, use of the internet to access cultural websites, and volunteering in cultural activities, and the findings are conveyed in this report.

Scottish Government. (2009) *Minister's response to the HEACS Infrastructure and Economic reports*

Scottish Parliament Economy, Energy and Tourism Committee. (2008) *Growing Pains – can we achieve a 50% growth in tourist revenue by 2015?*

Key issues in this report are: *The 50% ambition; Decluttering the public/private framework that supports the industry; The investment challenge ; Addressing education, training and skills needs; The role of technology, electronic communication and marketing; The role of events; The future relationship between the public and private sector; Transport and connectivity*

Tourism Intelligence Scotland (2007) *Scottish Tourism in the Future*

VisitScotland. (2008) *Insights from The Visitor Experience Study 2008 So What Does This Mean For Your Business?*

The Futures Forum is grateful to Francesca McGrath, SPICE researcher.

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