



HISTORIC
ENVIRONMENT
SCOTLAND

ÀRAINNEACHD
EACHDRAIDHEIL
ALBA

CORPORATE PLAN 2025-2028 - EQUALITY IMPACT ASSESSMENT

SECTION ONE: ESSENTIAL INFORMATION

About the Proposal/Project

1. **Proposal/Project:** HES Corporate Plan 2025-2028
2. **Name of Lead Officer:** Catherine Rothwell
3. **Team:** Strategy and Policy
4. **Directorate and Service:** External Relations and Partnerships/Strategy and Policy
5. **Tel:** N/A
6. **Email:** adam.jackson@hes.scot
7. **Date started:** January 2025

What is the Proposal?

1. **Budget or Other significant Financial Decision:** No
2. **Corporate Policy/Plan (New or Change):** Yes
3. **New or Changed HR Policy & Practice:** No
4. **New or Changed Service Delivery / Service Design:** No

Who Does the Proposal Affect?

1. **Stakeholders:** Yes
2. **Partners:** Yes
3. **Members of the Public:** Yes
4. **Employees:** Yes
5. **Other, please specify:** N/A

The main aims and projected outcome of this proposal

Our Vision is Heritage for All. Our Outcomes are as follows:

Scotland's heritage

By 2028, we will have:

- increased investment in the heritage assets in our care
- provided inspiring and memorable visitor experiences
- enabled good decision-making for Scotland's protected places

Skills and Learning

By 2028, we will have:

- inspired a new generation of learners through our skills and outreach programmes

People and Places

By 2028, we will have:

- increased the economic and community benefits from Scotland's historic environment
- sustained our grant funding to ensure the historic environment delivers against national priorities

Climate action

By 2028, we will have:

- led the way in reducing our climate impacts
- made Scotland's heritage central to the just transition to net zero

Our organisation

By 2028, we will have:

- increased our income and invested it in Scotland's heritage
- provided a safe, secure, and inclusive environment in which our colleagues can thrive

SECTION TWO: FINANCIAL INFORMATION

1. Current spend on this Service (£'000s)

N/A

2. What is the dis-investment to this service budget (£'000s per annum)

N/A

3. What is the investment to this service budget (£'000s per annum)

N/A

4. Is this proposal a change to a charge or concession?

a. Dis-investment Total: N/A

b. Investment Total: N/A

5. When will the saving/return on investment be achieved?

a. Start Date: N/A

b. End Date (if any): N/A

6. Is this proposal a change to grant funding?

a. Dis-investment Total: N/A

b. Investment Total: N/A

7. Is this proposal a change to grant criteria?

No

SECTION THREE: EVIDENCE

A - QUANTITATIVE EVIDENCE:

Scottish Household Survey 2023: Culture and Heritage report

As HES operates on a national level, it should seek to engage with people and communities across Scotland as a whole. As such, we use national-level information from the Scottish Household Survey (SHS). It should be noted that this only surveys people who live in Scotland, so international visitors are not included. At present, we have no data which breaks down engagement by protected characteristics for international visitors.

The SHS is held every year and the results published by the Scottish Government:

<https://www.gov.scot/collections/scottish-household-survey-publications/>

2023 results

According to the 2023 SHS, 88% of those surveyed had taken part in cultural engagement in the previous year. This is a slight reduction on the figure of 90% in 2018 and 2019, the latest comparable years before the pandemic.

Cultural Attendance

Gender

Attendance at any cultural events and visiting places of culture over the last year stood at 67% for men/boys and was slightly higher at 71% for women/girls. Excluding cinema, these figures stood at 75% and 78% for men/boys and women/girls respectively. The figures for visiting an historic place were 32% for men/boys and 33% for women/girls. 'Gender described in another way' and 'Refused' were not included in the published tables.

Age

Attendance at any cultural event and visiting places of culture over the last year was highest in those aged between 16-24 (86%) including cinema and between 35-44 (76%) excluding cinema. The lowest figures were for ages 75+ in both categories, falling to 52% including cinema and 50% excluding cinema. Specifically for those visiting an historic place, the highest attendance was for the age group 35-44 (41%) and lowest for the age group 75+ (19%). A breakdown for visiting an historic place can be seen below

Adults	16-24	25-34	35-44	45-59	60-74	75+
Historic place (%)	27	35	41	36	31	19

Disability

Overall figures for attendance for those who reported a disability stood at 60% including cinema and 54% excluding cinema. These compare to figures of 82% and 75% for those who did not report a disability respectively. For visiting an historic site, these figures were 22% for those who reported a disability and 37% for those who did not. It should be noted that these figures have remained largely the same across the previous years of the survey.

Ethnicity

Cultural attendance by ethnicity can be seen below. For the purposes of analysis presented in this table, 'White: Other' includes Irish, Gypsy/Traveller, Polish and other white ethnic groups and 'Minority ethnic groups' includes mixed or multiple, Asian, African, Caribbean or Black, Arab or any other ethnic groups .

Adults	White: Scottish	White: Other British	White: Other	Minority Ethnic Groups	All
Any including cinema (%)	75	82	82	74	76
Any excluding cinema (%)	68	77	74	62	69
Historic Places (%)	30	45	44	25	33

From this table it can be seen that attendance by those groups included under the “minority ethnic groups” heading is consistently lower across all categories than those included in the “White: Scottish, British and Other” groups. In the case of visits to historic places, this is a difference of some 19 percentage points.

Sexual Orientation

Attendance overall for those who identified as heterosexual/straight who attended a cultural event or visited a cultural place including cinema was 76% and excluding cinema was 69%. These figures were higher for those identifying as Gay, Lesbian or Bisexual, with visiting any including cinema at 93% and excluding cinema at 89%. This pattern was reflected in the figures for those who had visited an historic site, with 32% of those who were heterosexual having visited and 49% of those who were Gay, Lesbian or Bisexual.

Religion

The figures for attendance by religious affiliation is set out below. For the purposes of the survey, this means both loose self-identification and active or formal belonging to a religious group. As can be seen from the table, the highest attendance for historic places is from those who identify as Other Christian, but there is not a large statistical difference across the responses in any category.

Adults	None	Church of Scotland	Roman Catholic	Other Christian	Another religion	All
Any including cinema (%)	78	72	76	75	74	76
Any excluding cinema (%)	70	68	69	69	60	69
Historic Place (%)	34	30	31	39	28	33

Marital status

In 2023, attendance was highest at an historic place for adults who were married or in a civil partnership at 38%. The next highest was those who are single (30%), followed by those who were divorced or separated (28%) and those who were widowed or bereaved (18%). These were largely shadowed by the overall attendance figures, as can be seen in the table below:

Adult	Married or civil partnership	Divorced or separated	Widowed or bereaved	Single – never married or in partnership	All
Any including cinema (%)	79	68	53	79	76

Any excluding cinema (%)	73	63	48	69	69
Historic Place (%)	38	28	18	30	33

Cultural Participation

The survey asked respondents about their participation in cultural areas with a number being relevant, or potentially relevant, to the historic environment including photography, crafts, play music or an instrument, art, or sculpture, viewed cultural content online, and film making.

In 2023, 50% of respondents had participated in any activity listed, excluding reading with 74% having participated in any activity including reading. Of these, those who had viewed cultural content online (eg museum or heritage collections or artist's work) was 8%. This was a reduction from 11% in 2018.

Gender

The figures for viewing cultural content online were aligned with the overall figures when broken down by gender, with 7% of men/boys having done so and 8% of women/girls. When broken down for any participation including reading, the figures were 68% for men/boys and 79% for women/girls. Excluding reading they were 45% for men/boys and 54% for women/girls. It can be seen that participation is higher for women/girls across all categories.

Age

Viewing cultural content online was broadly similar across all age groups, with all at 8% except the 16-24 age group which is 7%. Across participation in all activities including reading, the highest was 60-74 age group with 77% and the lowest was 16-24 age group with 68%. Excluding reading, participation was highest in the 16-24 age group at 56% and lowest in the 75+ age group at 50%.

Disability

Viewing cultural content online was marginally lower for those who reported having a disability at 6%, compared to 8% for those who did not report having a disability. Looking at participation in any activity listed excluding reading it stood at 47% for those who reported a disability and 51% for those who did not. Including reading the figures were 71% and 75% respectively.

Ethnicity

The groups with the highest figures for viewing cultural content online were White: British and White: Other at 12% and 10% respectively. White: Scottish was 6% and Minority ethnic groups stood at 7%. This is reflected in figures for overall participation, where White: British was highest at 84% and excluding reading at 63%. Lowest participation was for Minority ethnic groups at 69% including reading and 47% excluding reading.

Sexual Orientation

There was a marked difference in participation by sexual orientation, with 7% of those who identified as heterosexual having viewed cultural content online, compared to 21% of those who identified as Gay, Lesbian or Bisexual. Including reading, those figures stood at 73% for those identifying as heterosexual and 85% for those who identified as Gay, Lesbian or Bisexual. Excluding reading, the figures were 49% and 75% respectively.

Religion

Whilst the highest participation was for those who identified as Christian: Other (82% including reading, 61% excluding reading and 10% for viewing cultural content online), the other categories reported broadly similar

levels of participation in line with the averages for the survey as a whole (74% for any including reading, 50% for any excluding reading and 8% for viewing cultural content online).

Marital Status

The 2023 survey identified that the highest level of participation in any activity including reading was for those who were married or in a civil partnership. The lowest level was single adults at 69%. Excluding reading, the highest participation was single adults at 52% and the lowest was those who were widowed and bereaved. Viewing cultural content online was broadly similar and reflected the overall participation of 8%.

National Statistics

Population Census 2022

- Scotland's population grew to 5.4 million in 2022, the largest population ever recorded by Scotland's Census. This is a growth of 2.7% since the 2011 census. Of these, 51.4% were female and 48.6% male.
- Scotland's population continues to age and there are now more people in the older age groups than have ever been recorded before. 20.1% of the population is aged over 65, with 15.3% aged under 15. This is a 22.5% increase in those aged over 65 in Scotland, while all other age groups decreased.
- According to new questions, 0.44% of the population aged 16+ were trans people or had a trans history in 2022. Almost half of these identified as non-binary.
- A new question on sexual orientation, where the response was Gay or Lesbian, Bisexual or Other sexual orientation, provided the result that 4% of the population aged over 16 identified as LGB+. 87.7% of the population identified as straight or heterosexual.
- For the first time, the majority (51.1%) stated that they had no religion. The largest religious group was Church of Scotland, with 20.36%, followed by Roman Catholic with 13.3%. 2.2% were Muslim, with Hindu, Buddhist, Sikh, Jewish and Pagan all standing at under 1% each.
- In 2022, 12.9% of people in Scotland had a minority ethnic background, and increase from 8.2% in 2011. This is partly explained by immigration into Scotland. The percentage of people born outside the UK increased from 7% to 10.2% between 2011 and 2022.

The Census found that 2.5% of people aged 3 and over had some skills in Gaelic, an increase from 1.7% in 2011.

B - QUALITATIVE EVIDENCE

Social - case studies; personal /group feedback / consultation / research /other:

We have undertaken a thorough consultation on the corporate plan. This has included engagement sessions pre-drafting, an online consultation with engagement sessions and sessions specifically with equality groups both within and outwith HES. In addition, we have looked to the consultation findings from the development of Our Past, Our Future, the historic environment strategy and our recently updated Equality Outcomes for further research and data.

Best Judgement

1. Has best judgement been used in place of data / research / evidence?

Yes

2. Who provided the best judgement and what was this based on?

The Corporate Plan is a product of engagement with groups and individuals within and outwith HES. Equalities Groups have been consulted. The Plan's Vision, Purpose, Priorities and Outcomes have all been developed from this engagement.

3. What gaps in data / information were identified?

N/A as the Plan is a product of engagement

4. Is further research necessary?

No

5. If NO, please state why.

As this stage of development and drafting is complete, no further research is required. The Plan's progress will be measured and reported on through a series of Key Performance Indicators and delivery will be supported by an Operating Plan which will set out actions.

As the Plan has outcomes which are focused on Equalities related areas, as well as elements relating to Equalities running through it, research and analysis will be undertaken in order to report successfully on them. In addition, delivery of our new Equalities Outcomes will form part of the delivery of the Corporate Plan and these will also have research and analysis as part of the reporting.

SECTION FOUR: ENGAGEMENT/CONSULTATION WITH INDIVIDUALS OR ORGANISATIONS AFFECTED BY THE POLICY OR PROPOSAL

1. Has the proposal / policy / project been the subject of relevant engagement/consultation?

Yes.

2. If YES, please state who was engaged/consulted.

Public consultation responses – organisations: Sanquhar Enterprise Company, St Peter's and St Muloug's Episcopal church, Community Archaeology Westray, Volunteer Scotland, RSPB, Scotland's Towns Partnership, British Deaf Association, Architectural Heritage Fund, Cademuir Building Consultants Ltd, Built Environment Forum Scotland (BEFS), Chartered Institute for Archaeologists, National Trust for Scotland, Creative Scotland.

A toolkit for responding to the consultation was sent to the following organisations: BEMIS, CEMVO, Scottish Refugee Council, Coalition for Racial Equality and Rights (CRER), MECOPP (Minority Ethnic Carers of People Project, Intercultural Youth Scotland, Scottish Ethnic Minority Older People Forum, Youth Scotland, Scottish Youth Parliament, Stonewall Scotland, Equality Scotland, LGBT Health and Wellbeing, LEAP Sports Scotland, LGBT Youth Scotland, Scottish Trans, Enable, Capability Scotland, RNIB Scotland, British Deaf Association, Scottish Autism, Disability Equality Scotland, Inclusion Scotland, Scottish Commission for Learning Disability, Trussell, Inspiring Scotland, The Wise Group, Fare Share, The Poverty Alliance, The Robertson Trust, and Child Poverty Action Group (CPAG) Scotland.

We also ran a focussed engagement session for HES's internal Equalities Forum.

3. If NO engagement/consultation has been conducted, please state why.

N/A

4. How was the engagement/consultation carried out? What were the results? Please highlight and embed any consultation report/s.

Focus Group

Engagement sessions took place both before and during the public consultation. These included a specific session with our Equalities Forum. This feedback is contained in the full consultation analysis report, which will be published alongside the Plan.

All feedback and engagement from the focus groups and public consultation has fed into developing the Plan's content and direction, including its priorities and outcomes.

Around 60 individuals took part in the engagement sessions.

Survey

The Plan was publicly consulted on for 10 weeks from 23rd October 2024 – 3rd January 2025. An online survey was hosted on Historic Environment Scotland Citizen Space during this time:

<https://haveyoursay.historicenvironment.scot/development-partnership/consultation-for-hes-cp25-28/>

The survey received 35 responses, 16 from organisations and 19 from individuals. The analysis from the public consultation will be published alongside the Corporate Plan.

Questions were asked in the survey about the impact that the Plan would have on protected characteristics. According to the draft consultation analysis report, the responses were as follows:

	Positive impact	Negative impact	No impact	No response
Age	9	1	10	14
Sex	6	-	13	15
Sexual orientation	6	-	13	15
Gender reassignment	6	1	12	15
Disability	8	2	9	15
Race and ethnicity	6	-	13	15
Pregnancy and maternity	6	-	12	16
Marriage and civil partnerships	6	-	12	16
Religion or belief	6	1	12	15

Overall, a higher number of respondents felt there would be a positive impact rather than a negative impact across all characteristics. However, a considerable proportion of respondents felt that there would be no impact, or did not provide a response to this question.

Respondents commented that the Plan was too vague or lacking in detail to clearly assess the impact on those with protected characteristics. Other said they could not see how the plan would be relevant in affecting these groups and other said the impact would depend on how the plan was implemented.

Some respondents would like to see a focus on inclusion and equality in relation to pricing and one was concerned with barriers to volunteering to certain groups. A charity or third sector organisation with a heritage purpose could see potential benefits for deaf communities through increased knowledge of British Sign Language.

The responses have all been analysed and have contributed to the development of the final draft of the Plan. The Plan has sought to integrate equalities, diversity and inclusion throughout the plan and placed more emphasis on inclusion both within HES and on our external facing work.

Display / Exhibitions

No.

User Panels

No.

Internal/Public Event

We held a number of engagement sessions before going out to public consultation and during the public consultation period. These were both for staff, specific external groups and for the public more generally. Feedback from these events have contributed to the development of the Plan.

5. Has the proposal / policy / project been reviewed / changed as a result of the engagement/consultation? If Yes – identify changes.

Yes. Pre engagement informed the consultation draft and the final version has been informed by the engagement sessions and responses to the public consultation.

6. Have the results been fed back?

Yes. The Plan will be publicly launched with press and media planned. It will have a presence on the HES website.

7. Is further engagement/consultation recommended?

No

SECTION FIVE: PARTNERS / OTHER STAKEHOLDERS

1. Which sectors are likely to have an interest in or be affected by the proposal / policy / project? Describe the interest / affect.

Business

Business operating in the heritage sector in either a first or secondary capacity are likely to be both interested and affected. A Business Regulatory Impact Assessment has also been carried out and will be published alongside the Plan.

Local Councils/Community Planning Partners

As decision-makers and asset owners of the historic environment local councils will be both interested and affected. Community Planning Partners with their interest in planning and place-making will also be interested.

Wider Heritage/Conservation/Tourism Sectors

As the Corporate Plan for the largest operator of heritage attractions in Scotland, the heritage sector in Scotland will be interested and affected. The wider UK heritage sector may be interested. Conservation and tourism sectors in Scotland will be both interested and affected.

Voluntary / Other Sectors

The third and voluntary sectors who actively work with the historic environment are likely to be both interested and affected.

Other(s):

Scottish Government policymakers across different Directorates are likely to be interested in the new Corporate Plan. The new Plan supports Scottish Government priorities and aligns to Scottish Government plans and strategies, such as the National Performance Framework, so no negative impacts have been identified.

SECTION SIX: ASSESSMENT OUTCOME

- 1. Only one of following statements best matches your assessment of this proposal / policy / project. Please select one and provide your reasons.**

No major change required

The Plan has been developed through internal and external engagement and consulted with many groups, including the HES Equalities Forum. The final Plan seeks to integrate Equalities throughout the document and contains a specific outcome relating to creating an inclusive culture for staff and customers at HES.

The strategy aligns to Scottish Government priorities, to Scottish Government strategies and plans, and to the National Performance Outcomes, which are based on reducing inequalities and making Scotland a fairer and more inclusive place. These government outcomes are aligned to the UN Sustainable Development Goals and ensure that the new Corporate Plan is aligned to and supports these development goals.

The Plan will be supported by an Operating Plan, which will span the lifetime of the Corporate Plan, and will set out the actions that will deliver the outcomes of the Corporate Plan. These will be underpinned by a series of Key Performance Indicators, which will be used to monitor progress against delivery.

The proposal has to be adjusted to reduce impact on protected characteristic groups

No

Continue with the proposal but it is not possible to remove all the risk to protected characteristic groups

No

Stop the proposal as this is potentially in breach of equality legislation

No

SECTION SEVEN: ACTION PLANNING

- 1. As a result of performing this assessment, what actions are proposed to remove or reduce any risks of adverse outcomes identified for employees, customers; participants; service users or other people who share characteristics protected by the Equality Act.**

No Mitigating Actions

- 2. Where a negative impact on diverse individuals/ communities has been identified what is the justification for continuing with the proposal / policy / project?**

Whilst no major impacts have been identified, some potential barriers to engagement were highlighted in the consultation and data analysis. These included:

- Lower engagement among minority ethnic groups: Potential lack of representation and targeted outreach.
- Accessibility challenges for disabled individuals and older adults: Concerns about physical access and alternative engagement methods.
- Pricing concerns: Affordability as a barrier for some communities.
- LGBTQ+ representation in heritage interpretation: A gap in inclusive storytelling.

Through our Operating Plan will seek to address these barriers. Actions identified will include targeted outreach, accessibility improvements (including digital accessibility), and affordability initiatives. In addition, our Equality Outcomes 2025-29 and Action Plan will focus on empowerment of underrepresented communities, removing barriers to access, and inclusive workforce and leadership.

- 3. Are actions being reported to ELT? If yes when and how?**

Yes – The corporate plan is underpinned by an operating plan, which will contain actions for delivery. Progress against this will be reported to ELT on a regular basis.

- 4. Date Reported to ELT**

On a rolling basis through the three-year timescale.

SECTION EIGHT: LEAD OFFICER SIGN OFF

Signature:	Date:
Catherine Rothwell	10/03/2025

SECTION NINE: HEAD OF SERVICE/DIRECTORATE SIGN OFF

Signature:	Date:
	12/03/2024