

PEOPLE MAKE HERITAGE

HERITAGE TOURISM 2020



Our collective ambition is to be a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people.

from Mid Term Review of national tourism strategy, Tourism Scotland 2020 (2016)

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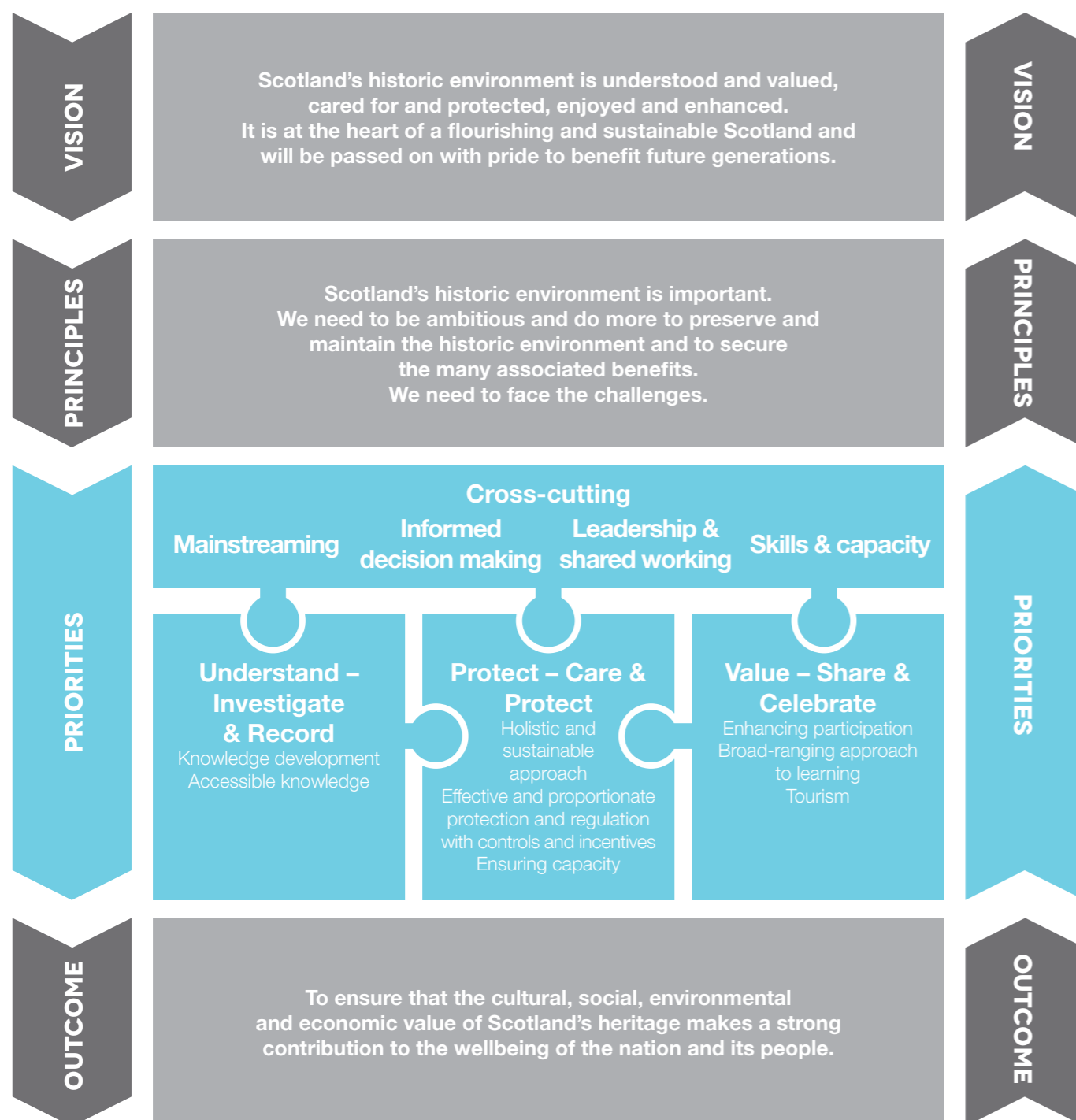
A strategic framework for leadership and growth in Scotland's unique historic environment and heritage tourism sector.

Prepared for the Heritage Tourism Group

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THE STRATEGY CYCLE



AMBITION FOR GROWTH

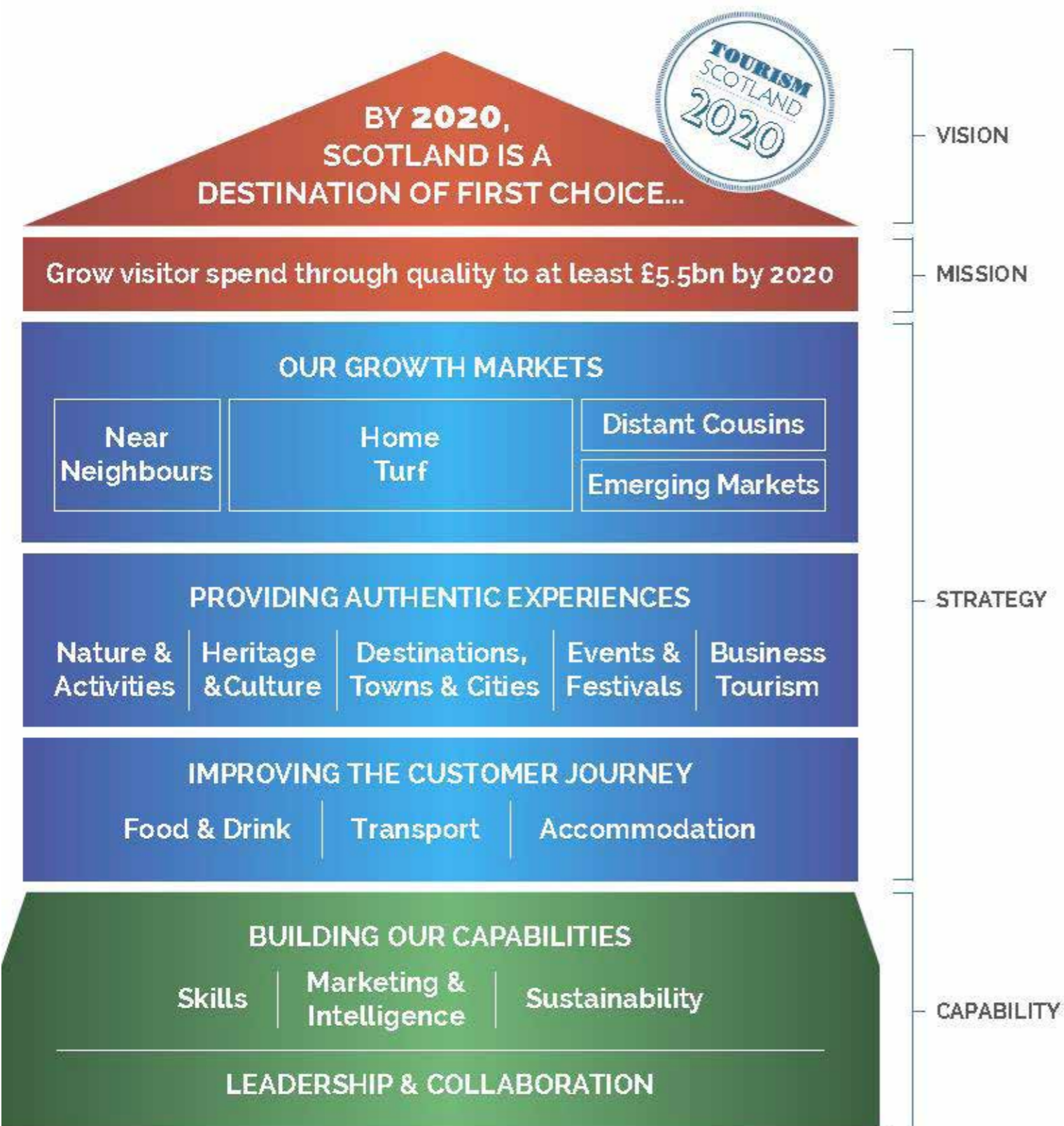
Heritage Tourism 2020 (HT2020) is uniquely charged with delivering against two national strategies: Tourism Scotland 2020 (TS2020) which was launched in 2012, and the Historic Environment Strategy (HES) for Scotland which was launched in 2014.

TS2020 sets the scene in terms of leadership and growth in the tourism sector and how this should be achieved but HES brings an added dimension by setting out how important our heritage assets are to both domestic and overseas visitors.

Tourism Scotland 2020, the national tourism strategy for leadership and growth was launched in 2012 with the goal of making Scotland 'a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people'. This growth will be achieved through quality authentic visitor experiences which highlight those aspects of our assets that are uniquely Scottish – contemporary or traditional - and are delivered to the highest possible standard at each and every

stage of the journey. Heritage is recognised as one of the key sectors with potential for growth. Growth in visitor spend will come from three main markets; 'Home Turf', 'Near Neighbours' and 'Distant Cousins' with new and emerging markets making an increasing contribution through time.

In 2014 the first ever Historic Environment Strategy 'Our Place in Time' (OPIT) was launched by the Scottish Government highlighting that Scotland's historic environment makes Scotland distinctive as a nation and firmly acknowledging that we should make full and effective use of our heritage assets to promote Scotland to both domestic and international audiences, and in so doing, grow the overall value of heritage tourism in Scotland.



HERITAGE IN CONTEXT

This strategic framework 'Heritage Tourism 2020' seeks to combine the ambition of both strategies and to establish a clear route map for the sector to both grow the volume and value of heritage tourism but also share and celebrate the richness and significance of our historic environment with locals and visitors.

The key to success in aligning these strategic priorities in one framework lies in an ethos of sharing, learning and collaborating. Leadership is provided through the Heritage Tourism Group (HTG), which has been charged, by both the TS2020 Strategy Group, coordinated by The Scottish Tourism Alliance (STA) and the Scottish Government to develop this framework and then coordinate its delivery.

In progressing this critically important piece of work, definitions have come to the fore – with a clear need to articulate what this strategic framework for Heritage Tourism is seeking to achieve but also what it is not addressing and ultimately expects others to tackle.

When Tourism Scotland 2020 was published, four asset blocks were defined;

- nature, heritage and activities
- destinations, towns and cities
- events and festivals
- business tourism.

Each was seen as having significant potential for growth, and considerable scope to respond to specific market opportunities.

However, when the action planning for TS2020 got underway in 2013 it became evident that the 'heritage' dimension needed to be developed separately from nature and activities. This was partly because of the nature of the sector itself but also the different players who will be responsible for driving a strategic framework forward.

The HTG highlighted that a fifth asset block should be created to accommodate 'Heritage and Culture'. This decision was taken by the TS2020 Strategy Group in 2014 and provided the context for developing this framework. However, having created this separate asset block for 'Heritage and Culture' further definitions were required.

'Heritage and Culture' are widely recognised as key drivers for tourism across the globe but the tourism industry has always acknowledged the difficulty of adequately defining these terms. However in 2010 VisitBritain explored this topic and defined three pillars within Culture and Heritage – built heritage, cultural heritage and contemporary culture.

These definitions have been developed to provide a clear basis for understanding what is and isn't included in this heritage tourism strategy for Scotland and also the significance of the remaining two pillars to encourage those engaged in cultural heritage and contemporary culture to consider a similar response to TS2020.

THE THREE PILLARS OF CULTURE & HERITAGE

| BUILT HERITAGE | CULTURAL HERITAGE | CONTEMPORARY CULTURE |
|---|---|---|
| <ul style="list-style-type: none"> • World Heritage Sites • Famous Buildings and Monuments • Castles and Stately Homes • Churches and Cathedrals • Heritage Attractions • Cities and Towns • Britain's Iconic Sights | <ul style="list-style-type: none"> • Museums and Art Galleries • Performing Arts • Gardens • Pubs • Food and Drink • Shared Historical Connections & researching ancestry • Watching Sport • Literature • Education & Learning • Monarchy | <ul style="list-style-type: none"> • Music & The Arts • Nightclubs and Bars • Films and TV Locations • Design and Fashion • Festivals • Modern British Food • Cosmopolitan Britain |

Source: VisitBritain, Culture & Heritage Topic Profile, Feb 2010

The Scottish Historic Environment Audit (SHEA) is currently undertaken every two years and includes key facts on tourism, reputation and attitudes. SHEA provides a catalogue of all the formal historic environment designations that exist in Scotland – most of which provide the focus or backdrop for holidays, short breaks and days out.

The key historic environment designations across Scotland as set out in SHEA 2012 are:

- 5 World Heritage Sites
- 47,672 listed buildings
- 8,205 scheduled monuments
- 645 conservation areas
- 390 gardens and designed landscapes
- 28 historic battlefields
- 8 protected wrecks and 7 scheduled wrecks
- 2 National Parks
- 40 National Scenic Areas

Most of these designated sites currently have a visitor and tourism interface, with some being major players in attracting visitors to Scotland and also generating a high proportion of our tourism revenue – such as Edinburgh Castle and World Heritage Site, Bannockburn, New Lanark, Urquhart Castle and Culloden.

Others, including undesignated sites and assets, provide the backdrop to visitor experiences and days out, and are often key features of the scenery and landscapes, which characterise different regions of Scotland. And others are special places linked to Scotland's historic events, ancestry and key moments in time.

Combining Scotland's Historic Environment designations with the categories set out in the Built Heritage pillar defined by VisitBritain above has provided the basis for defining the 'Culture and Heritage' sector as shown opposite. This in turn has enabled the HTG to define the scope and extent for this Heritage Tourism Framework.



the historic environment of Scotland ... our built heritage and the iconic sites and places that define our nation and that are accessible to the public.

The Heritage Tourism strategic framework adopts and hopes to become renowned for its ethos of sharing, collaborating and learning to achieve growth and deliver a high quality, authentic visitor experience.

HERITAGE TOURISM 2020: 'PEOPLE MAKE HERITAGE'

Heritage Tourism 2020 (HT2020) is the strategic framework for leadership and growth in this important sector. It aligns with the ambition and target set out in the national tourism strategy for 2020 – but also has specific targets for 2017, which will be Scotland's Year of History, Heritage & Archaeology. In addition it seeks to engage closely with and encourage strong interplay between cultural heritage and contemporary culture.

SCOPE

This strategic framework for Heritage Tourism 2020 embraces and seeks to influence all tourism and visitor related activity associated with Scotland's unique historic environment, including our designated but also undesignated features and assets.

Many of the properties and places set out in the Built Heritage pillar have formal designations and are protected for their heritage value. But equally there are many heritage features within the Scottish landscape that are not formally designated but give

a sense of place and tell a story. They are all key features in many holidays, short breaks and days out in Scotland either as a specific place to visit and enjoy or forming the scenic backdrop to more general activities whether this is driving and touring, outdoor activities, a walk in the countryside or an event/festival.

Scenery and landscape account for more than 55% of the top reasons for choosing to visit Scotland and it is this outstanding historic environment that sits at the heart of HT2020.

The scope of this strategic framework is therefore defined as embracing:

Scotland's' historic environment, built heritage, and the iconic sites and places which define Scotland, which are designated or protected for their intrinsic heritage value (or have the potential to be) and are open and accessible to the public, offering an authentic experience of, and insight into Scotland's heritage.





But importantly, having defined the scope of HT2020 and what it embraces, it is important that this and any definitions for Cultural Heritage and Contemporary Heritage are seen as definitions only for the purposes of allowing targeted action plans to be developed and, in this case, for the HTG itself to review its membership and potentially bring new players to the table. But the definition also helps emphasise the need for cross-sectoral activity exploring the fascinating interplay between our historic environment and wider cultural heritage and the need to work closely together to promote tourism activity and growth.

Importantly, the definitions are not intended to create silos. In a Scottish context, there already is and there will continue to be a strong interplay and cross fertilisation between heritage and culture.

Contemporary Culture and Cultural Heritage both bring our historic environment and built heritage to life and in many ways are the means whereby this strategic framework will achieve its goals. Museums are seen to be part of our cultural heritage but the collections are often housed in historic buildings so it is crucially important that these links are retained. Ancestry and tracing family roots, a very important strand of cultural tourism, often becomes much more real for a visitor when they visit the historic place where their ancestors lived, worked, got married or were buried - and can become the basis for many repeat visits. Clearly all future marketing activity will bring the three strands very close together.



MARKETS & AUDIENCES

TS2020 growth markets (namely Home Turf, Near Neighbours, Distant Cousins and Emerging Markets) are all important to the heritage tourism sector, with the overseas markets being keenly interested in and contributing considerably to the visitor spend at the key heritage attractions such as Edinburgh Castle. However, in the context of HES, which focuses on enhanced active participation for the people of Scotland, the importance of the day visitor comes to the fore and encourages this sector to place an equally strong focus on the local day trip and education markets.

SHEA 2012 highlighted that the Scottish Household Survey shows that one in five (21%) adults had visited an historic or archaeological sites in the 12 months prior to 2011. With two of the main players in the heritage tourism sector being membership based there could be significant scope to grow this audience both in extent of membership but also frequency of visit and exploration of new experiences.

Heritage properties typically appeal to a much older market and a key challenge set within this strategic framework is to significantly enhance the appeal of these attractions and experiences to younger audiences. The recent market segmentation work by VisitScotland (VS) and also National Trust for Scotland (NTS) and Historic Environment Scotland (HES) provides invaluable insights on what different segments are seeking and provides an ideal focus for new marketing and product development activity in the heritage tourism sector.

An important action relates to reporting against the TS2020 four growth markets. The two large players in Heritage Tourism and also VisitScotland do gather good data on visitor origins, but do not currently record against these growth markets – notably visitors who can be described as Distant Cousins and Emerging Markets. A key action is therefore to explore mechanisms for reporting growth within these markets, and increases in visitor spend as a consequence.



LEADERSHIP & COLLABORATION

The Heritage Tourism Group has been charged with responsibility for leading, developing and then delivering Heritage Tourism 2020. This group is formally recognised by both the Scottish Tourism Alliance and its strategic partners, but also the Scottish Government. The HTG has an explicit role in delivering key activity for TS2020 and HES.

The HTG, which evolved out of the Historic Property Group, has developed a strong track record in collaboration with key successes over a number of years, which include:

- Scotland's Heritage Aisle at VisitScotland's annual EXPO showcase event for the travel trade
- The Scottish Heritage Pass for trade
- A 3 year Visitor Research programme across the top Historic Environment Scotland and National Trust for Scotland sites
- The Mystery Visit Partnership with NTS, HES and Forestry Commission Scotland
- Consumer Marketing – various examples
- Joint Ticketing between NTS, HES and Historic Houses Association Scotland (HHA) properties and sites

This group therefore provides clear industry leadership and the basis for even greater collaboration.



THE KEY PLAYERS

The HTG has three core members – Historic Environment Scotland, National Trust for Scotland and Historic Houses Association (Scotland). These bodies are the key enablers and deliverers in the heritage tourism sector and also provide exemplar best practice as a catalyst for others within the sector. This group is supported by Scottish Enterprise, VisitScotland and the Scottish Tourism Alliance and is currently chaired by Historic Environment Scotland.

HT2020 provides a full definition of the scope of the Heritage Tourism Group's activity and acknowledges the group's membership may grow and adapt through time. For example Scottish Canals and Scottish Natural Heritage have a core interest in the definition now adopted for Built Heritage and Historic Environment and there is scope for the HTG to also link in with other structures such as Association of Scottish Visitor Attractions (ASVA), Association of Large Visitor Attractions (ALVA), Edinburgh Tourism Action Group (ETAG) and Glasgow Life. However, during the early stages of adopting this framework, developing the action plan and establishing the monitoring framework it will be important to keep the group tight and focused, but also to consider the most appropriate operational model to ensure it is effective in championing the successful delivery of this strategic framework.

THE ETHOS

The Heritage Tourism strategic framework adopts and hopes to become renowned for its ethos of sharing, collaborating and learning to achieve growth and deliver a high quality, authentic visitor experience.



PERFORMANCE & MONITORING

The bi-annual Scottish Historic Environment Audit (SHEA) reports on key facts about the historic environment including the designations in Scotland; employment; economy and leverage from grants; funding; tourism, reputation and attitudes; membership, participation and volunteering opportunities and education and training.

Given the focus of this strategic framework on the Historic Environment, there is significant potential to adopt the SHEA reports as the foundation for at least some of the performance and monitoring of HT2020. The tourism related facts currently referred to in SHEA do require validation and expansion. It will also be important to liaise with VisitScotland and others to ensure there is consistency in the terms used, but fundamentally SHEA could readily form the basis to on-going target setting, monitoring and evaluation. It will also be important to link this HT2020 activity to the wider TS2020 reporting framework and specifically to the Measuring Success project for the Historic Environment Strategy that is now underway and provides the ideal context for developing and fine tuning the reporting requirements.

This is an important early action for HT2020 and will ensure that reporting against TS2020 and HES is joined up. TS2020 focuses on 2 key indicators – visitor spend and customer satisfaction, and for heritage tourism it will be important to explore realistic options for properly monitoring these. For customer satisfaction there is scope to use Tripadvisor's Standard of Excellence as a transparent basis for measurement and the NTS as one of the key HTG partners is currently exploring this.

An important consideration with the two largest players in this sector undertaking regular and rigorous data collection and readily sharing this with each other and through ALVA, ASVA and the Moffat Centre Visitor Attraction Monitor, is to both seek to better align this data collection with the wider TS2020 data management definitions and to ensure that this is also collected by other operators across the sector. The HES Measuring Success Working Group provides an excellent basis for doing so.



IMMEDIATE PRIORITIES

In developing this framework there was an overarching priority to 'understand' the scope and extent of the heritage tourism sector and consequently what this strategic framework embraces – and what it doesn't.

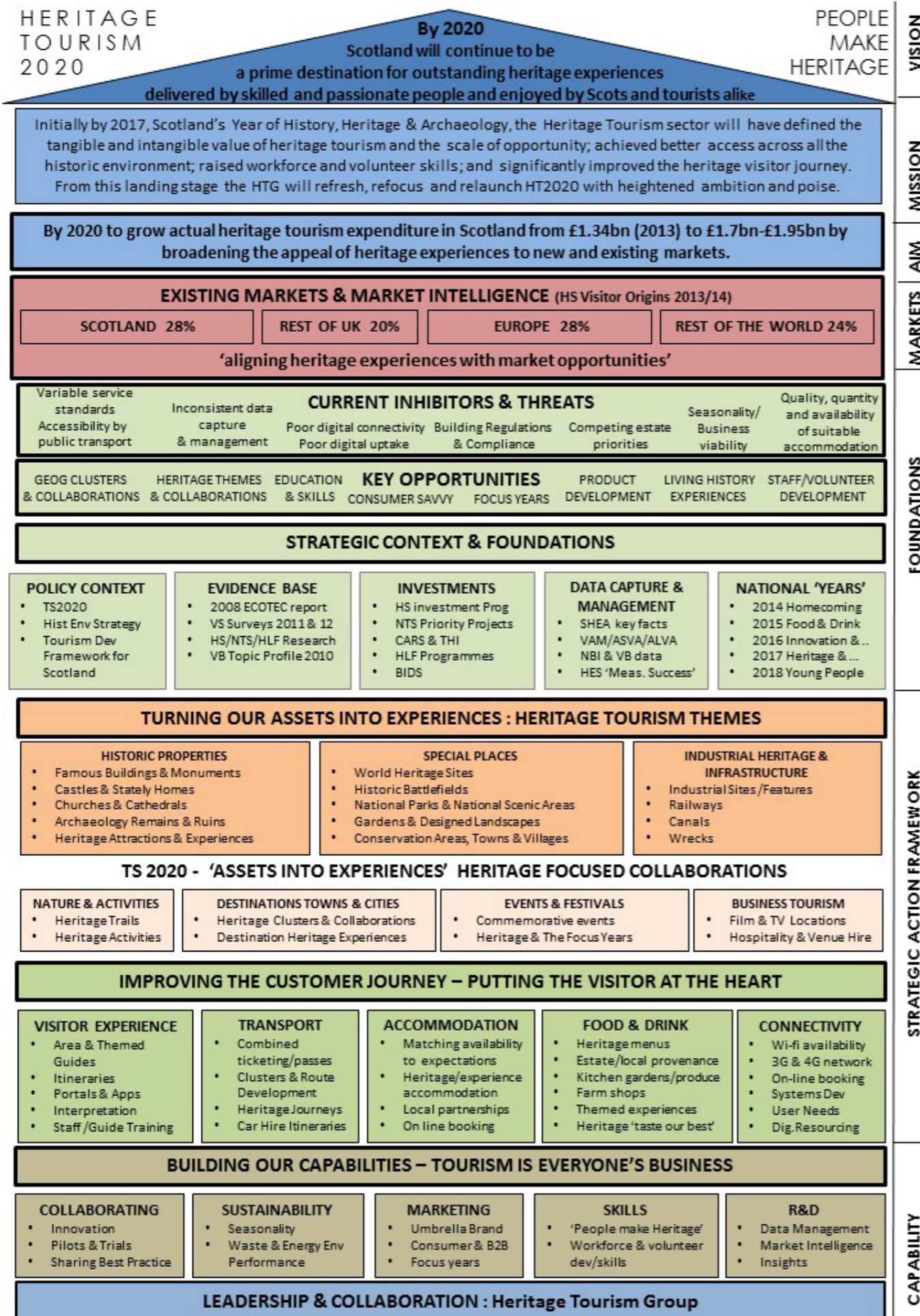
Four immediate priorities have now been identified for the heritage tourism sector that need focus in the next three years. This is to ensure the sector and the HTG are as well placed as possible to champion and deliver the aspirations of both the national tourism strategy and the historic environment strategy in Scotland's Year of History, Heritage and Archaeology in 2017 – and to then use this as a launch pad for the next phase of activity through to 2020.



Given the collaborative context for this strategic framework, five overarching priorities for action in preparation for the Year of History, Heritage and Archaeology in 2017 are:

- A: Value** – developing a robust methodology that places a tangible but also intangible value on the heritage tourism sector and having a recognised and validated mechanism for measuring growth and channelling investment
- B: Accessibility** – better understanding the geographic spread of heritage interests, promoting the creation of clusters and collaborations and ensuring that the economic potential and visitor appeal of Scotland's historic environment is realised across the country
- C: Skills** – developing a People Make Heritage skills development programme specifically to address known skills shortages in the heritage tourism sector focussing on specialist visitor service skills, wider ambassadorial skills, marketing and the overarching need for professionalisation and for heritage being seen as a stimulating career path where you work in beautiful places and provide customer delight.
- D: The Visitor Journey** – improving the heritage visitor journey with a focus on quality and consistency, and responding to changes in visitor needs
- E: Leadership** – providing leadership for the sector and seizing opportunities for cross sectoral collaborations.





THE HT2020 ROCKET

VISION, MISSION & AIM

Heritage is already one of the key reasons why people visit Scotland and the vision seeks to ensure this continues to be the case, and further growth is achieved.

To facilitate growth, an ethos is being promoted of sharing, collaborating and learning across the sector with a target set in 2017 to have completed a growth cycle with the four immediate priorities being addressed, new business development ideas implemented and benefits being realised - and to mark this with a major programme of activity linked to the Year of History, Heritage and Archaeology in 2017 being delivered with the HTG as a key stakeholder champion. The volume and value aim is to grow tourism from the last recorded amount of £1.34bn visitor spend in 2013 to a target in line with TS2020 ambitions of £1.7bn - £1.95bn in 2020.

This will be achieved by broadening the appeal of heritage experiences to new audiences, better collaborating within the heritage sector, across other sectors, and with a greater focus on destination clusters and collaborations. In addition, given the focus of HES, this sector will have stronger crossovers with education and learning and encouraging Scots to engage with their historic environment more readily and more often. A key aspect of this will be staff/volunteer capacity building.

Scotland will continue to be a prime destination for outstanding heritage experiences delived by skilled and passionate people and enjoyed by Scots and tourists alike.



EXISTING MARKETS, TARGET MARKETS AND MARKET INTELLIGENCE

With two large multi-property organisations being involved in heritage tourism in Scotland there is some excellent market information available. VS and others have undertaken much research, which provides a robust context for growth. At this stage there is not a great deal of information available on the split by country of origin as defined by TS2020's pillars for growth, and their propensity to enjoy heritage features, but it has been agreed that this would be worth exploring further, and tailoring existing data collection to this. The breakdown stated on the HT2020 rocket is from Historic Environment Scotland in 2013 and are known to have higher than average overseas visitors. However, in the absence of a breakdown across the sector these figures can readily be used for benchmarking and tracking changes through time. The aspiration is to secure greater overseas visits to other sites and attractions.

VS published new segmentation for the UK market, which is highly relevant to this strategy for growth in Heritage Tourism. Their model identifies 10 UK segments, of which 5 will provide the best return on investment.

These are

- Adventure Seekers
- Curious Travellers
- Engaged Sightseers
- Food Loving Culturalists
- Natural Advocates

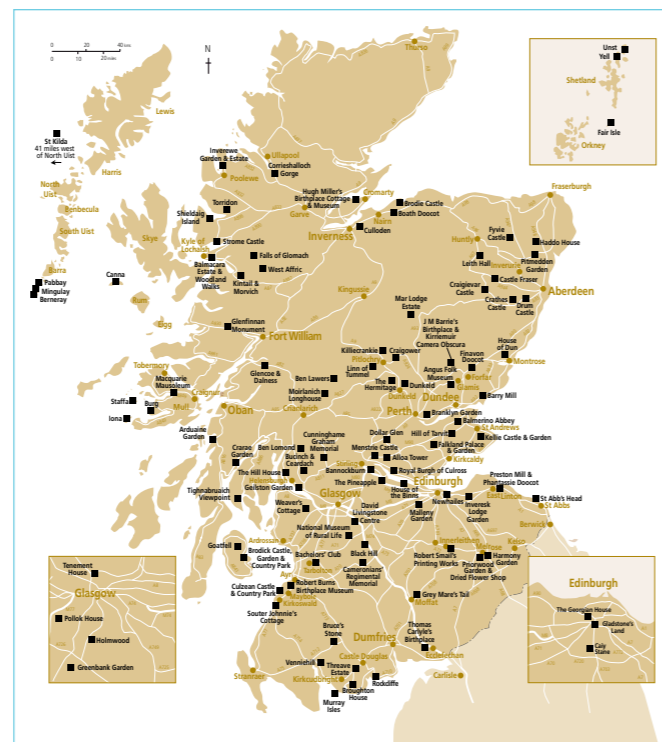
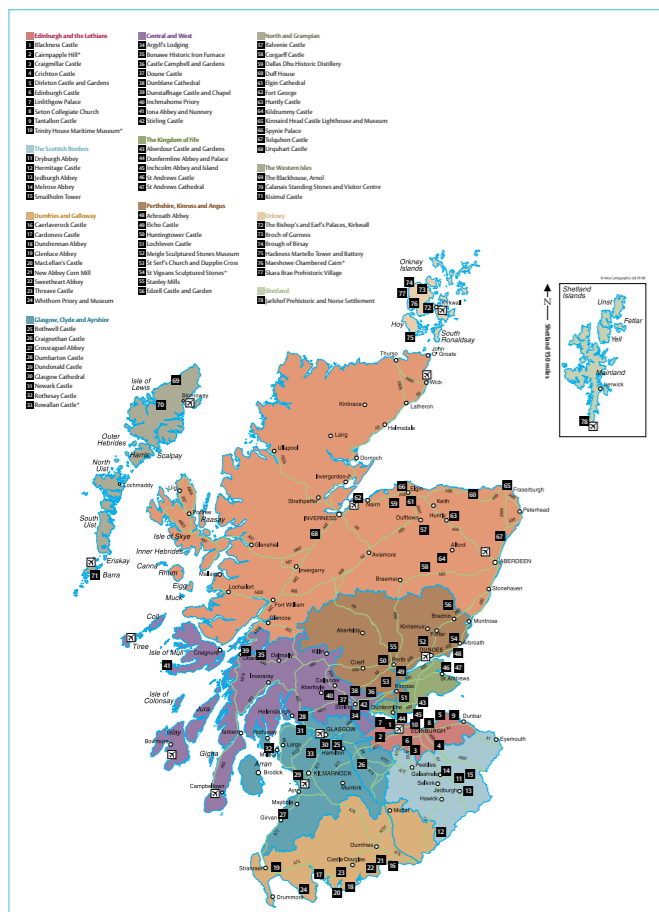
Interestingly for HT2020, all five segments have 'breath-taking scenery and landscapes' as one of three key factors when choosing a holiday or break closely followed by 'fascinating history and culture'. NTS have also developed their own heritage sector segments which, although specific to their own needs, identify two segments which NTS believe have the greatest scope for growth at their properties and experiences.

Refining and applying this excellent segmentation is a key activity to be developed within the HT2020 action plan.

CURRENT INHIBITORS AND THREATS

There are a number of serious threats and issues that currently inhibit scope for growth in the heritage sector. Key issues relate to the geographic location and physical remoteness of sites and attractions, competing priorities especially on owner occupied sites, poor digital connectivity but also poor digital uptake within the sector, and also the quality, quantity and availability of suitable accommodation

close to heritage attractions. Service standards are variable across the sector and there is a significant reliance on volunteers who may be enthusiastic and knowledgeable but lack customer care skills and training. An additional inhibitor is the inconsistent way in which data is captured and shared which means the scope to explore trends and develop targeted activity is hampered.



KEY OPPORTUNITIES

As set out in the Historic Environment Strategy there is a real opportunity through HT2020 to demonstrate to all our visitors the positive correlation between visits to our historic environment and the impact on their health and wellbeing.

Some simple mapping has demonstrated that heritage properties cluster across Scotland and HES, HHA and NTS have a different balance of interests across the country. There is significant scope to develop local heritage tourism partnerships with destination organisations (DMOs) but to allow this to happen an audit of all DMO groups and their capacity to form effective partnerships would be welcomed in parallel with a full GIS mapping of all the Historic Environment designations and heritage assets in Scotland, and clustering of these in relation to the DMOs and also by categories (eg archaeology, medieval castles, stately homes).

Ideally each of the destinations, who have been tasked with generating their own TS2020 rockets, should seek to align their heritage activity to this heritage tourism strategy - as far as is relevant to their local strengths - with a clearly articulated action plan stating how they propose to support its delivery.

This also ties in directly with the Destinations, Towns and Cities strand of activity within TS2020 where there are significant opportunities around heritage themed collaborations - which could be in the form of trails, events, itineraries and experiences.

Other opportunities specific to this sector relate to digital connectivity and uptake; consumer savvy and being contemporary; staff and volunteer development with a focus on customer care and professionalisation; securing more tourism benefits from educational visits and tours; business development opportunities; and using the up and coming focus years to pilot new ideas.





The Scottish Government's Themed Years Programme announced for 2015 to 2018 provide opportunities for the heritage sector to be better promoted but also as a platform for on-going activity. The Year of Food and Drink was a perfect platform for encouraging more and more heritage properties and attractions to develop their food and drink offer, given the affinity and expectation of authentic food and heritage properties. There are significant opportunities linked to local provenance from the estate and kitchen gardens, farm shops, heritage menus, 'below stairs' and other themed experiences.

In 2016 there is also significant scope for the Heritage sector to interact with the Year of Innovation, Architecture and Design, with many of Scotland's Stately Homes, Listed Buildings and Scheduled Monuments being prime examples of innovation in their day. Mount Stuart on the Isle of Bute, for example, was the first house in the world to have a heated indoor swimming pool and the first house in Scotland to be lit by electricity.

2017 is the Year of History, Heritage and Archaeology and simply provides the ideal opportunity for this sector to galvanise itself and be a key stakeholder in the delivery of a yearlong celebration of what makes Scotland such a special place, and to open as many doors and gates as possible to locals and visitors alike.

STRATEGIC CONTEXT

The strategic context for developing this framework for growth is set by three key documents, TS2020, the Historic Environment Strategy and the Tourism Development Framework for Scotland. The Tourism Development Framework is seeking to provide a strategic context for investment in tourism across Scotland and to initially understand what is either planned or underway on a regional basis. Investment in heritage tourism features and infrastructure are key aspects of this.

There has been work undertaken to establish an evidence base both through specific research in 2008 to understand the scale of opportunity for growth. Relevant data is collected through the VS national visitor surveys, specific research and data collection by NTS and HES, research by VisitBritain and also membership feedback to both HES and NTS. But a key strategic action is to seek to align what is being collected and to highlight key gaps or discrepancies in data collection.

Data capture and management is a key issue within all sectors in relation to tourism and is essential to not just demonstrate growth in volume and value but also to identify trends and devise action plans to respond to these. There are a number of data capture systems in place but a key focus needs to be on breadth of input and consistency.

There has been and continues to be significant investment in the heritage sector both in relation to restoring and upgrading existing heritage features and attractions, building new attractions (eg Bannockburn). But there are also investments at all levels through Heritage Lottery project activity and Historic Environment Scotland grant funded programmes including Conservation Area Regeneration Schemes and Town Heritage Initiatives in key conservation towns and villages. Seeking to better align such investment to the ambition set out in national tourism strategy and to encourage local DMOs and other partners to engage in these initiatives will be important.

TURNING OUR HERITAGE ASSETS INTO AUTHENTIC EXPERIENCES

Heritage & Culture, as set out earlier, is one of five asset blocks that form the basis of the TS2020 'assets into experiences' strategy.

Within HT2020 the various components of our Historic Environment have been refined into three Heritage Tourism asset blocks; historic properties;

special places and industrial heritage and infrastructure. The HTG will develop themed activity linked to these assets, and aimed at specific target markets and audiences. These asset blocks will also readily be used as the basis for sharing information on best practice and case studies, and developing themed products and itineraries.

CROSS SECTORAL WORKING

Heritage has very clear overlaps with the other four assets blocks in TS2020 – Nature & Activities, Destinations, Towns & Cities, Business Tourism and Events & Festivals – and much can be achieved by a greater degree of cross sectoral working and collaboration.

For Nature & Activities, at a simple level, developing cycling trails and sailing itineraries that encourage participants to enjoy heritage features and attractions should be developed. There is also considerable scope to further develop heritage events and activities such as classic car tours, heritage boat excursions and traditional country sports.

From a Destinations, Towns and Cities perspective, there is significant scope to focus energy on local collaborations between heritage and other attractions with area passes, themed itineraries and also to develop new heritage experiences that combine a number of local features and heritage accommodation.

From a business tourism perspective there is significant growth potential in film locations, corporate hospitality and weddings, with some sites and venues being extremely well developed for these markets, and others with untapped potential.

IMPROVING THE CUSTOMER JOURNEY

The customer or ‘visitor’ journey is a very important component of the heritage experience which needs to be improved, with key actions relating to information provision; transport and ease of access; accommodation and meeting expectations; food and drink and digital connectivity.

Each of these is significant in the context of heritage tourism especially with the heritage experience often being very disconnected from the rest of the visitor journey. This is a priority action within this strategic framework with exploring digital opportunities and also digital connectivity and uptake are an equally high priority.

BUILDING OUR CAPABILITIES

Skills and training are priorities within TS2020 and are considered vital to securing a step change within the heritage sector especially with there being such a high level of volunteers, and also staff working on heritage properties who may not have originally come from a hospitality or customer care background. People Make Heritage is the tagline for this strategy and is at the heart of all that is proposed.

Research and development is an important capability to develop, ensuring good market intelligence is available and proper research programmes established. There is a need for this sector to be bold in piloting new ideas and initiatives and to encourage the spirit of entrepreneurialism. The sector is, by its very nature, conservationist and risk averse but a step change is needed to ensure it remains relevant and also capable of reaping its inherent growth potential – whilst not destroying its inherent heritage value.

Marketing is all-important and has to be highly tailored to the different interests of tour operators, individual consumers, niche markets and corporate interests. Greater collaboration is the key to success, building local partnerships.

From the outset of this strategy planning process the need for an umbrella brand for Scotland’s Heritage has been highlighted. An umbrella brand will be developed which sits above the corporate entities that manage many of the properties and attractions across Scotland and which encapsulates the essential qualities of our heritage offer irrespective of location, era or management. Sustainability is potentially very difficult to deliver in the heritage sector especially ‘green tourism’ practices. Regulations prevent some practices and the physical location and remoteness of some properties do not lend themselves to the use of low carbon transport. However, many heritage properties do sustain local jobs in remote communities and also keep local traditions and cultural activity alive.



LEADERSHIP AND COLLABORATION

Fundamental to the successful delivery of this strategic framework will be leadership and close collaboration. The HTG has a tradition of good collaboration but now has a new and refreshed remit from both TS2020, and the Historic Environment Strategy. It has a full and proper focus on tourism, is charged with the development of this strategic framework and is now the group responsible for overseeing and evaluating its delivery.

At a pragmatic level there is the Scotland's Heritage Tourism Group that was initially set up by the previous Historic Property Group (HPG) to progress the Heritage Aisle at VisitScotland EXPO but has since grown and progressed new projects and developed other partnerships including the Scottish Heritage Pass. This group could be a key delivery vehicle for HTG and HT2020, and its capability and capacity should be reviewed and could be enhanced in this context.



ACTIONS & OUTCOMES

OPERATIONAL PRIORITIES

Immediate and overarching priorities have been identified for action (value – accessibility – skills – visitor journey) and within this context the HTG have established the need to devise a new operational structure and delivery framework specific to the heritage tourism sector to ensure the leadership and collaboration provided by the Heritage Tourism Group is robust and focused on driving forward Heritage Tourism 2020.

There are options such as a consortium, co-operative, associations and a BID (Business Improvement District) based structure, each of which have been adopted by different groups within tourism and have relative pros and cons for the heritage tourism sector and the current HTG members. A key action is to consider the relative merits of the alternatives and agree which is the best way forward to secure the successful delivery of HT2020.

To make HT2020 happen on the ground and for the sector to secure the vision they have set, HTG have collectively identified that activity is needed on three fronts; consumer related, industry related and being '2017 ready' to ensure the exceptional opportunity offered by the 'Heritage History and Archaeology' focus year is optimised.

Nine operational priorities with associated actions have been established as follows;

2017 Ready

A: 2017 Ready

Consumer Related

B: Market Research and Customer Experience

C: Heritage Portal

D: Itineraries

E: Participation & Inclusion

Industry Related

F: Leadership & Engagement

G: Digital Heritage

H: Data & Baseline Monitoring

An action plan will be devised for each of the operational priorities setting out what will be done, who will take the lead, what success will look like and key milestones to demonstrate progress. In addition we undertake to promote strong cross sectoral collaborations, notably with cultural heritage and contemporary culture but also across the other four asset blocks set out in TS2020 (Destinations, Towns and Cities; Events and Festivals; Nature and Activities and Business Tourism), and linked to the Themed Years now agreed for 2015-2018.

- 2015 The Year of Food & Drink
- 2016 The Year of Innovation, Architecture & Design
- 2017 The Year of History, Heritage & Archaeology
- 2018 The Year of Young People

The HTG has also set an interim target for 2017, the Year of History, Heritage and Archaeology. By 2017 the HTG aim to have collectively tackled our immediate priorities and to have secured the following:

- a) Established a means of measuring the tangible and intangible value of heritage tourism in Scotland and its growth through time
- b) Secured a balance of interest across the country and from all the organisations engaged in heritage tourism
- c) Significantly enhanced our capabilities in relation to skills and training, with a significant increase in professionalization within the sector
- d) Become key players in delivering a consistent, high quality and contemporary visitor journey.
- e) Provided strong leadership for the sector and seized multiple opportunities for cross sectoral collaborations

As a very public endorsement of our successful delivery of these strategic priorities we aim to be a key stakeholder in a major programme of activity across the year and across the country in 2017, the Year of History, Heritage and Archaeology.

In terms of resources, as a bare minimum, a dedicated resource is required to coordinate the delivery of the action plan and ensure it is periodically reviewed and updated, and monitoring and evaluation is fed back into TS2020 and HES. The action plan, once agreed, needs to be reviewed every six months, with monitoring against targets and Key Performance Indicators but also new priorities identified and refreshed targets set. In addition, a creative project development and packaging resource is recommended.

HOW WILL WE MEASURE SUCCESS?

Ultimately we will measure success by measuring growth in visitor experience, and have set our target as:

By 2020 to grow actual heritage tourism expenditure in Scotland from £1.34bn in 2013 to £1.7bn – £1.95bn by broadening the appeal of heritage experiences to new and existing markets.

The Measuring Success Working Group established for HES will play a crucial part in defining the monitoring framework and also tracking progress.

