

World Heritage UK Technical Meeting “Commercial Best Practice in World Heritage”
Kew Gardens, London
6th and 7th March 2018

Workshops Report

During the course of WHUK’s Technical meeting held at Kew in March 2018, with the theme of “Commercial Best Practice in World Heritage”, a number of workshop discussion sessions were held. Delegates were divided into three groupings and, in the main, these groups remained the same for each of the three workshop sessions.

Session	Chair	Scribe/rapporteur
Workshop Group 1	Chris Blandford / Sam Rose	Lesley Garlick
Workshop Group 2	Rebecca Hartley	Jane Gibson
Workshop Group 3	David Holroyd	Beth Thomas

Each session was themed:

1. Understanding the Market
2. How to Develop Your Package
3. How to Deliver Commercially

The intention was to draw out examples of good (or failed) practice in order to learn from each Site and to see if there are issues in common. These best practice examples and possible future actions were shared in the feedback session at the end of the meeting.

Discussion often overlapped between the three Workshop topics so there was a certain amount of duplication. In addition, a lot of information was gleaned on visitor numbers and other characteristics of visitors for many of the UK’s World Heritage Sites; this is summarised in the Appendix.

Session 1: Understanding the Market

a) Discussion Points

i) Research

- There is a need for better market intelligence and understanding of visitors through visitor profiling and behavioural studies and to understand the capacity of each Site. Should highlight the potential for changing visitor patterns and increasing numbers at quieter times.
- The most recent additions/tentatives to the WHS “family” have good, up to date research which could be usefully shared and replicated – eg Lake District and Jodrell Bank
- Need to understand that our markets are diverse even within one WHS, particularly those which cover a large area/range of attractions. This can be an opportunity, bringing visitors with different interests to sites (eg Blaenavon has parts of the Brecon Beacons in WHS and there is potential to bring the outdoor enthusiasts to visit the industrial heritage sites).
- There is potential for WHSs to share best practice in how they engage with their top markets to help other sites interested in penetrating those as well.
- There are both domestic (families, local communities, repeat visitors) and international visitors (travel trade or independent) which can be further broken down.
- Free entry Sites have much larger number of visits, particularly from local people, who can visit for other objectives eg health and well-being, but often this makes counting/segmenting etc much more of a challenge

- Visitor numbers can be dictated by trends outside control of Sites eg the growth of Ryanair and Easyjet to European cities in the 1990s had a negative impact on the weekend visitors to Bath; the response was to build the Thermal Spa which has had a very positive affect on the market and brought weekend visits back to the City.
- Great Spas of Europe work has shown that across Europe some countries have a better handle on the world travel market than others. Germany, Czech Republic and Slovakia are doing good things.
- Online ticketing can gather a wide range of data to be analysed; an insight into who/which sites are using these systems and what data is being gathered would be a useful start. Develop its use through incentives eg discount for online bookings

ii) Marketing

- All Sites have marketing strategies in some form, either directly (Kew, Fountains) or indirectly through the DMO / DMP. These should be shared for best practice and to see synergies and commonalities. Although the challenge may be that there can be multiple marketing strategies across several stakeholders on one WHS – a challenge to coordinate.
- Sites should decide who they want to visit and what dwell times should be.
- Sites should be looking at linked initiatives at the international scale eg Hadrians Wall and the Great Wall of China. Greenwich has developed its Chinese tourist market, but realises that their marketing in China needs facilitation, using a local agency to customise their marketing.
- Need to think innovatively eg wedding market and globally eg online sales.
- Some of the larger Sites have tapped into the Travel Trade Show network for their own promotion. Potential to develop a WH:UK-wide package for them to take along as well although Sites might feel this would dilute their message.
- Get visitors to market for you through their use of social media eg Durham has picture frame for selfies of the WHS view; this could be improved if Durham's hashtag was added to the frame.

iii) Capacity

- What is meant by capacity? Landscape sites, urban sites, archaeological sites all have different carrying capacity and issues related to tourism and management. Different WHSs have different issues: can be total numbers throughout the year, or seasonal peaks and troughs, holding events out of core hours or low visitor numbers needing development across the board.
- Some Sites, eg Bath, Orkney, have issues around short-term mass influx of visitors from coach trips and cruise ship visits. These can have damaging impact on infrastructure but bring little benefit to the local community.
- The Lake District is looking for "Value not Volume" – this is common across several sites and particularly sites like Bath and Stonehenge where there are still large numbers who come for a short visit on a multi-stop tour and are not contributing to the visitor economy or gaining much appreciation of the Site. Research shows that in general cultural visitors are more likely to provide value over volume.

iv) Branding

- Although awareness of WH status can be high (although this needs more research and evidence), it is not necessarily a motivator behind a visit.
- There is wide variation in how the WH brand is used at individual Sites; some hardly at all such as Kew and Edinburgh. This is also tricky when there are competing brands such as NT, EHT at Stonehenge/Avebury and National Maritime Museum at Greenwich. Other sites have created their own brand e.g. Cornish Mining, Jurassic Coast and Derwent Valley Mills.
- The Lake District National Parks Authority has managed to use its collective brand to build a partnership with Columbia outdoor clothing. Agreed that WH does not yet have that kind of pulling power, but it should!
- The problem is that the WH offering is so varied, there is no coherent brand and so UK WHSs are not marketed as an entity. However, WH is a global brand and using it as an additional strapline would perhaps be stronger in selling to the overseas market. Could UK National Commission help in developing a suite of coherent brands for UNESCO Designated Sites across the UK – they are keen to provide tangible benefits towards increased sustainability of designated sites in the UK?

- Even where WH brand is not used for marketing, Kew has found it very useful in leveraging funds from Government to fund recent large-scale projects which are helping to make the site more sustainable. WH status is also a powerful argument in planning objections against the potential threat to views within the setting of Kew.

b) Actions

- i) WHUK's "State of the Nation" report by Chris Blandford should be used to flag up the issues with Government.
- ii) Each Site should develop a Sustainable Tourism Policy (ref: UNESCO Operational Guidelines).
- iii) All sites should follow the example of the National Trust at Fountains Abbey and Giants Causeway and have a common question about WH motivation on all visitor surveys eg "How much did the WH status influence your visit today?"
- iv) Sites should be considering Visitor Payback initiatives (or even bedroom taxes or congestion charges) and ensure income goes back to maintaining the asset.
- v) The issues with UNESCO re use of the UNESCO and WH brand needs to be made easier.
- vi) Full agreement that more effort needs to be directed towards promoting a UK wide WHS brand.
- vii) All Sites should have a statement within their next marketing strategy to say that they are members of WH:UK with a common vision and are working together with other sites in the UK to raise profile etc

Session 2: How to Develop Your Package

a) Discussion Points

i) Packages

- Need to take risks and be different to attract new audiences.
- WH can meet the government objective of getting more overseas visitors out of London and can develop a number of discrete themed packages such as landscape, archaeology, industrial heritage to market to overseas visitors as the best of the best. Specific Sites could buy into one or more of the themes.
- Need Government support for a UK wide initiative eg the Garden Festivals which had a regeneration objective. Could UK National Commission help here?
- Within each Site, there should also be thematic opportunities, eg urban trails (Bath) and walking packages (Jurassic Coast). The four Welsh Castle sites should be marketed as a package but this is challenging when each has always done independent marketing.
- Joint ticketing across attractions on a single WHS would be very helpful, but is not simple to negotiate(!), benefits need to be well-researched and a strong case made.
- "Added value" experiences can allow development of engagement eg meet the curator or behind the scenes tours. "White knuckle" experiences eg climb the rigging at the Cutty Sark – can open up access to very different/new markets
- Scan the environment and take advantage of/tap in to new trends gaining popularity eg Jodrell bank is benefitting from the "space frenzy" created by Tim Peake's activities
- Cultural landscapes should be used as a concept.

ii) Capacity

- Need to be realistic about what is deliverable. Co-ordinators are already over-stretched and need to create additional capacity through project funding. Should consider apprentices, internships etc, supported by government funds. Also seek support from corporate responsibility budgets.
- Coordinators have a wide range of experience but are not marketing or tourism experts and need to work with other colleagues or buy in experience.
- Within larger Sites, individual attractions could contribute to a marketing project eg Cornish Mining Attractions Marketing Association.
- We may not have a reason to market collectively but we could provide a product for funders and government. We could use collective power to increase capacity in other organisations and other specialist colleagues (Planning etc) and councillors.

- Coordinators are not marketers and need to invite the right colleagues ie marketing officers, to get on board. They can help in creating packages and strategies to make the most of World Heritage status and to market all Sites more effectively as a package.
- Will always be issues of balancing the interests of stakeholders eg a major blockbuster filming opportunity can bring a large amount of income to a WHS, but at the cost of limiting visitor access to the site (and potential negative publicity) – needs to be carefully managed

iii) Research and Data

- Agreed that research is key as need to understand the product, what is the impact on GDP and what could be the package. Should share information so should have a collective impact and value as a group. Could use the data (economic value, etc) to persuade funders but as yet there is not a coherent product. Each Site individually is a quality product, but there is not a WH:UK product.
- Look at successful competitors, what works for them may be replicated/adapted
- Anniversaries are good straps to hang development on – maybe a “calendar” of opportunities? Perhaps the DMOs already do this?

iv) Awareness

- Need to build public awareness of WHS in the UK; the Government should support this as could help meet the Brexit agenda and at the local level will make better planning and development decisions at local level
- A package could raise awareness of collective value; attract visitors and use network effect across the UK to support less visited sites and promote sustainable tourism
- We should develop an engagement ladder – get people in and then sell them the World Heritage / UNESCO message. Should be lobbying Council leaders and giving talks to local societies, as is happening in Bath.
- Events can help raise awareness even if not pushing “heritage” and not necessarily profitable eg “International Duck Race” at Pontycyltte, planned seaside beach at Greenwich. Don’t be too precious about “high heritage integrity” if a fun event gets a wider audience(s) in, then it can only be beneficial, we can tell them the full story once they are visiting! Of course there may be a need to balance reputation with popularity. Often needs effort into producing a strong business case to convince decision-makers.
- Power of the media should not be underestimated whether commissioned programmes such as CBBC GoJettlers animations or ad hoc filming using WH locations eg Poldark, Harry Potter, Game of Thrones or documentaries eg Secrets of the National Trust.

b) Actions

- i) Build on work initiated by Cumbria Tourism’s Discover England funding to develop bespoke tour packages for international visitors.
- ii) Develop a toolkit or package of ideas that can be tailored to each site depending on their needs. James Rebank’s Sustainable Tourism Toolkit should be revisited; it is a simple approach that can make a difference.
- iii) All Sites in the preface of their Management Plan should state that they are working with World Heritage UK nationally to support World Heritage.
- iv) Include a common question this year in all visitor surveys to mirror that used by the NT so that a consistent picture can be drawn across all Sites.
- v) Create a dashboard of common information: who comes, why they come, where are they from etc
- vi) Arrange a specific workshop / brain storming session with tourism/marketing colleagues to create packages and strategies to make the most of Sites World Heritage status.
- vii) Be more pro-active in suggesting programming to film-makers eg use WH as a ‘Best of the Best’ brand or the ‘Great British Collection’.
- viii) Support World Heritage Day on 18th April and for all sites have some kind of event or offer on the day (or nearest weekend).

Session 3: How to Deliver Commercially

a) Discussion Points

i) Commercial Benefits

- Key commercial gain for WH can be spreading benefits wider both seasonally outside the peak and to communities in the wider local area.
- Need to emphasise the benefits of out of season visits; can be a better experience eg fossils on Jurassic Coast in winter storms, and costs less.
- It seems that in many cases it is the individual attractions rather than the World Heritage Site *per se* that is the offer and the beneficiary. This means that what goes back to help protect and manage the Site itself is limited.
- If you consider York - what is the difference between it and Durham or City of Bath? What benefits derive from the WHS status?
- The benefit of WH status is collective for all Sites and should consider something similar to Visit England's [England's Historic Cities](#) website and app .
- Be aware that these may need to be specially tailored to specific audiences (where worthwhile) eg Greenwich uses "China Pay" a facilitated system for Chinese visitors to make purchases

ii) Awareness

- Bath/Durham offer talks to groups and societies which helps to raise local awareness of the Site and what WH status means.
- Some sites don't want more visitors, but the smaller sites benefit from being in the WH "club"
- Need to help people understand the process and its complexity related to World Heritage.

b) Actions

- i) All Sites agreed that they wished to see a collective and strategic approach under a common brand and strapline such as "Collection of Outstanding Experiences".
- ii) Develop an art installation (not quite on the scale of The Hive!) that could move between Sites – even something simple based on the words EPIC. Arts Council would probably fund a feasibility study.
- iii) World Heritage Photography competition at individual Sites and then brought together into a national exhibition with a sponsor such as RGS.
- iv) Produce a World Heritage coffee table book, using material from the photography competition, and also create a phone compatible website (not an app).
- v) Develop a "Year of Discovery" highlighting the best time to visit each WHS for every month.
- vi) For independent travellers should instigate a membership / passport type scheme that could be sold for £20 or so.

Appendix: Visitor Numbers / Characteristics at Selected Sites

Bath

- 4.6m visitors per annum (2014); 5.7m in 2015; a large number are on coach day trips.
- Approx 700k are staying visitors and this should increase with three new hotels;
- Roman Bath gets 1.2m visitors per annum.
- Country of origin data is not collected, but the audio guides give a good indication of foreign customers. In 2017, 10% were mandarin speakers.
- There is a residents' pass "Discovery Card" but take up is surprisingly low.

Durham

- Not sure about visitor numbers and who the visitors are. Durham Cathedral reports 750,000 visitors; it has a robust counting system and metrics that allows separation out of actual visitors from other throughput such as worshippers etc.
- Durham Cathedral has recently opened their Open Treasures exhibit which is paid for. The challenge is converting free visitors to the Cathedral into paying for the exhibition. It has also improved its retail and catering offer.
- Palace Green Libraries count visitors whilst undergoing period of conservation works.
- Tours of the Castle (University) have limited capacity due to operational issues. Access is by ticketed guided tours in term time, but now also has self-guided access in vacations, allowing increase in visitor numbers/throughput.
- How many people visit the peninsula in total? Visit County Durham states 4million each year – but how many of these are tourists vs local shoppers/workers?
- The biannual Lumiere event is so popular now that it is ticketed to restrict numbers. Timed for November, a low visitor period and helps spreads visiting season.
- There are two academic studies due to commence on visitor figures and hope this will provide more information on where visitors come from and how many there are. The last survey was undertaken 10 years ago so it will be good to compare the new data.
- Anecdotally there are more overseas visitors than previously. In part this is due to the increased number of overseas students studying at the university (ie students and visiting family and friends).
- The DMP works county wide and includes new initiatives such as the conservation of the Palace at Bishop Auckland.
- There is also a resurgence in Christian tourism through pilgrimage.

Fountain Abbey & Studley Royal

- 600,000 visitors this year – the highest ever (400,000 paid; 200,000 member visits).
- 18% of visitors are from overseas. This is higher than average for a NT property.
- NT collects a lot of data eg behavioural models, mosaic segments.
- DMO research can also be helpful.
- The property has had an art programme (e.g. Folly) to increase numbers and has an ongoing programme of events.

Greenwich

- 9.3m visitors per annum the area as a whole.
- Each of the attractions has their own figures Cutty Sark, National Maritime Museum, Old Royal Naval College etc.
- The offer is seen as the individual components rather than the "World Heritage Site" itself.
- It is estimated that 25% of visitors are from overseas mostly USA, Germany and France.

Jurassic Coast

- Due to being an open site with many popular beaches, impossible to monitor.
- Visitor centres along the coast receive about 1.0m visitors.

Kew

- 1.8m visitors per annum; aim to have 2m by 2018/19.
- The site does not track origins of visitors, but market research provides some indication of international visitors.

- Residents can get discounted entry. Many people use Kew as their local outdoor space rather than botanic gardens.

Lake District

- 18.2m visitors and around 15% are from overseas with top nations: China, Japan, Germany, Netherlands, France, America
- A biannual visitor survey is carried out with 1500 participants over a 7 month period
- Less is known about international visitors
- 80% are day visitors from the NE and NW conurbations
- Lake District is currently piloting using mobile phone data to get anonymised data on movements in the area. The data makes assumptions about social demographic, wealth etc based on the postcode of where the phone contract is held. However, not clear of its use and effectiveness.
- Not sure yet what the effect of the new WH status is on the area.

New Lanark

- Around 300k per annum of which 70/80% are paying.
- Around 20% are from Scotland including a lot of day visits and 20% international.

Orkney

- Approx 130k per year and a high proportion are international.
- Have a high proportion of day visits by coach from cruise ships.
- Very seasonal and easily disrupted by weather.

Pontycytlte

- Approx 320k per annum; free entry is attractor in itself including for coach parties.
- Undertake surveys for DMO Partnership eg age and group breakdown.
- A lot of local users and due to flat nature of towpath, used for "health" walks.

St Kilda

- Surprisingly large number at around 10k, many arriving from small cruise ships.

Stonehenge and Avebury

- 1.4m at Stonehenge with approximately 60% from overseas. This fluctuates in response to external focus such as value of £ and terrorism incidents.
- It is estimated that there are 350,000 visitors to Avebury. As it is a mainly outdoor and free attraction. There is a Museum and Manor House which charge but not all visitors visit these. The Manor house does not form part of the OUV of the Site.

Cadw

- 1.25m for all staffed sites across Wales. The busiest sites are the castles in the North accounting for 50% of the total visitor numbers with around 650,000 per annum of which in peak season 25% are international.
- Blaenavon which is a free site has around 30,000 visitors.
- Cadw doesn't count country of origin but does do market research and Cadw also use data from Visit Wales.
- Anecdotal evidence from site staff is that knowing where visitors come from can help tailor their experience.

Ireland

- Brú na Bóinne including New Grange is just one hour's drive from Dublin so is very accessible. Most visitors are day trippers from Dublin.
- The site is managed by timed ticket and is at capacity.
- A new interpretation centre is under development.