



National
Trust

Towards a 10-Year Vision for Places & Experiences

Version 2.1



Tony Berry, May 2020



The brief: what does the future look like?

The disruption to our work programmes created by lockdown has brought forward the need to create a **clear long-term vision for our experiences**. We're faced – much sooner than we thought – with some tricky choices about which activities to stop, start and continue.

It's forcing us to move on from an **evolutionary approach** (focused on building a better version of our current model, by constantly testing and learning) to a **future-led approach** (defining clearly what we want our experiences to be in the future, and working back to identify the changes needed to work towards that).

The big question is this: how can our experiences best play their part in our strategy? In particular, how do they attract and inspire people so that **everyone benefits** from our places; how do they address **unequal access**; how do they **build support** for – and involvement in – our work; how do they help us to **survive and thrive** so we can carry out our work? And how do our places need to change to support this?

This document begins to answer two fundamental questions:

- What role will we need our experiences to play in delivering our purpose and refreshed strategy by 2030, and how do our places need to change to support this?
- What do we need to do right now to move towards this?

Context

What are the likely changes that we will need to respond to – in society, technology, the environment and the needs of our audiences?

Drawing on input from Insight and external sources, these are some of the trends that seem most likely to influence the need for the experiences we can provide...





Environment

Urgency of more sustainable, low-carbon solutions – but with the increasing (although still patchy) growth of electric car use, the private car will still be the dominant form of transport



Technology

Increasing use of automation, VR/AR and technology as an enabler: expectation that content and access will be enhanced and personalised, but greater premium set on personal contact and authentic experience. Alongside increasing sophistication of the virtual world, post-consumerism trend likely to put an increasing premium on real-world experience.



Population

Even more diverse and more urban, more elderly (with increasing importance of better access for all abilities)



Cultural Changes

- Citizenship and nurture: growing importance of involvement, authenticity, integrity, local and wellbeing
- Control: people will expect more agency and control over their experiences
- Narrative and identity: growth of plural identities and narratives - people looking for space to explore and define their own identities
- Authenticity: Alongside increasing sophistication of the virtual world, post-consumerism trend likely to put an increasing premium on authentic real-world experience.

What does that mean for us?

These trends – if they're right – are likely to increase the importance of an approach to experiences that has these attributes:

- Sustainable / low carbon
- Focused on local connection
- Authentic, natural, personal experiences facilitated seamlessly by supporting technology and digital content
- Gives people more agency over how they use our places, how they define identity and significance
- Prioritises ease of access and diversity of use

Issues

What are the things we need to fix or mitigate - the barriers and shortcomings that we need to resolve if we're to be fit for the future?

One size fits all: all of our places – despite their differences in scale, nature, audience and resources - are expected to deliver the same core proposition, from opening times and admissions to presentation. And our focus on a relatively narrow proposition means that we struggle to build our audience beyond the profile of our existing membership.

Dependence on day out visits: our current visitor model puts a disproportionate load on peak times - which means our infrastructure feels as though it is bursting at the seams, even though we're well below capacity for most of the year. How can we move to a more flexible pattern of use that allows us to spread and manage growth in a sustainable way? And how do we reduce the environmental impact of car-borne visits?

Outdated mansion experience: our reliance on outdoors for growth has left us with a mansion offer that is still (despite cosmetic improvements) fundamentally unchanged since the 1980s, serving a loyal but (by 2030) dwindling audience and enabled by a loyal but dwindling volunteer base

Uneven distribution: we are increasingly serving local repeat audiences rather than tourists and long-distance days out. But the accident of our history has left us ill-equipped to serve local audiences where most people live – we're hugely under-represented in urban areas, and our urban green spaces are often under-resourced

Disconnect between cause and experience: despite our best efforts, membership is still a cheap season ticket for many of our members (particularly in the early years), and relatively few make the connection between the experiences they have and broader forms of support and engagement



Future

2030: a profile of our future experiences

Ambition: what do we want our experiences to achieve?

Our primary ambition doesn't express everything we're trying to achieve through our experiences, nor will it be the main outcome for many people. But it's intended to express what we want to be best-known for – and to guide us when we need to make tough decisions about the things that should have priority for scarce resources.

Positioning	Comparators	Potential to deliver strategy	Current position	Future strategy
Gateway to the outdoors and nature for everyone	Forestry Commission, National Parks, local park authorities	H	H/M	Priority
Major national cultural institution	British Museum, V&A, Tate, BBC	M	L/M	Dial down
Provider of public space, cultural/natural resources and enrichment for local communities	Local authorities, community-based charities (Groundworks, Age UK), regional museums	H	L/M	Priority
Leading provider of days out / tourism	Merlin, HRP	M	H	Secondary
Using experiences to promote our agenda as an environmental / nature conservation charity	RSPB, WWT, FoE, Woodland Trust	H	L/M	Secondary
Provider of activities and programmes for health and wellbeing	Central government, SGBs, Local Authorities, gyms	M/L	M/L	Through partners
Access to stories, experiences and learning (formal and informal) about history, art and nature	English Heritage, regional museums, heritage attractions, educational providers	M	M	Secondary

The roles we play – now and in the future

Primary ambition:

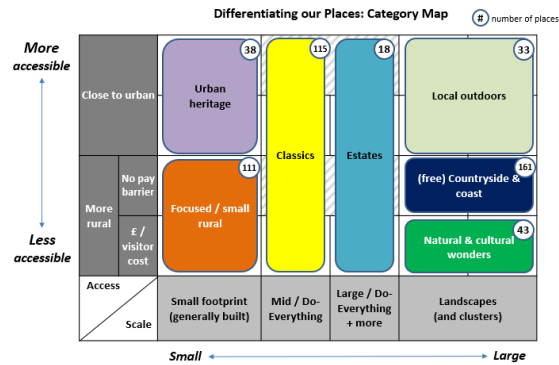
We believe that time spent in places that are rich in nature and culture is essential for everyone's wellbeing. Our most important role will be to make nature, beauty and history easy, accessible and appealing for the widest possible range of people.

Secondary ambitions:

- To increase how much people value and understand the importance of nature, beauty and history, and to give them more opportunities to play an active part
- To open up the potential of our stories and collections for learning, creativity and enjoyment, and for building shared cultural identities
- Contribute to local economies by playing our part in sustainable tourism
- Improve wellbeing and quality of life by enabling access to programmes of activity, community involvement and personal development
- To give communities access to shared, high quality public space
- To generate sustainable income to help the National Trust carry on its work

Shape

What will our offer need to look like to deliver our ambition?



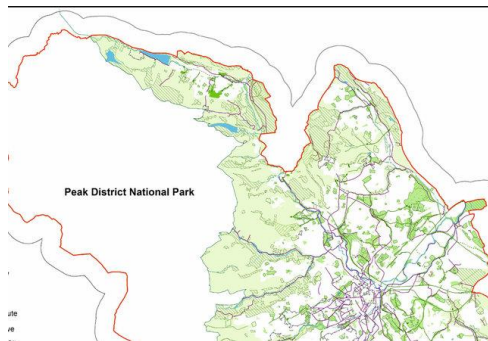
Differentiated



Accessibility above all



Rooted in community



Part of an ecosystem



Sustainable business model

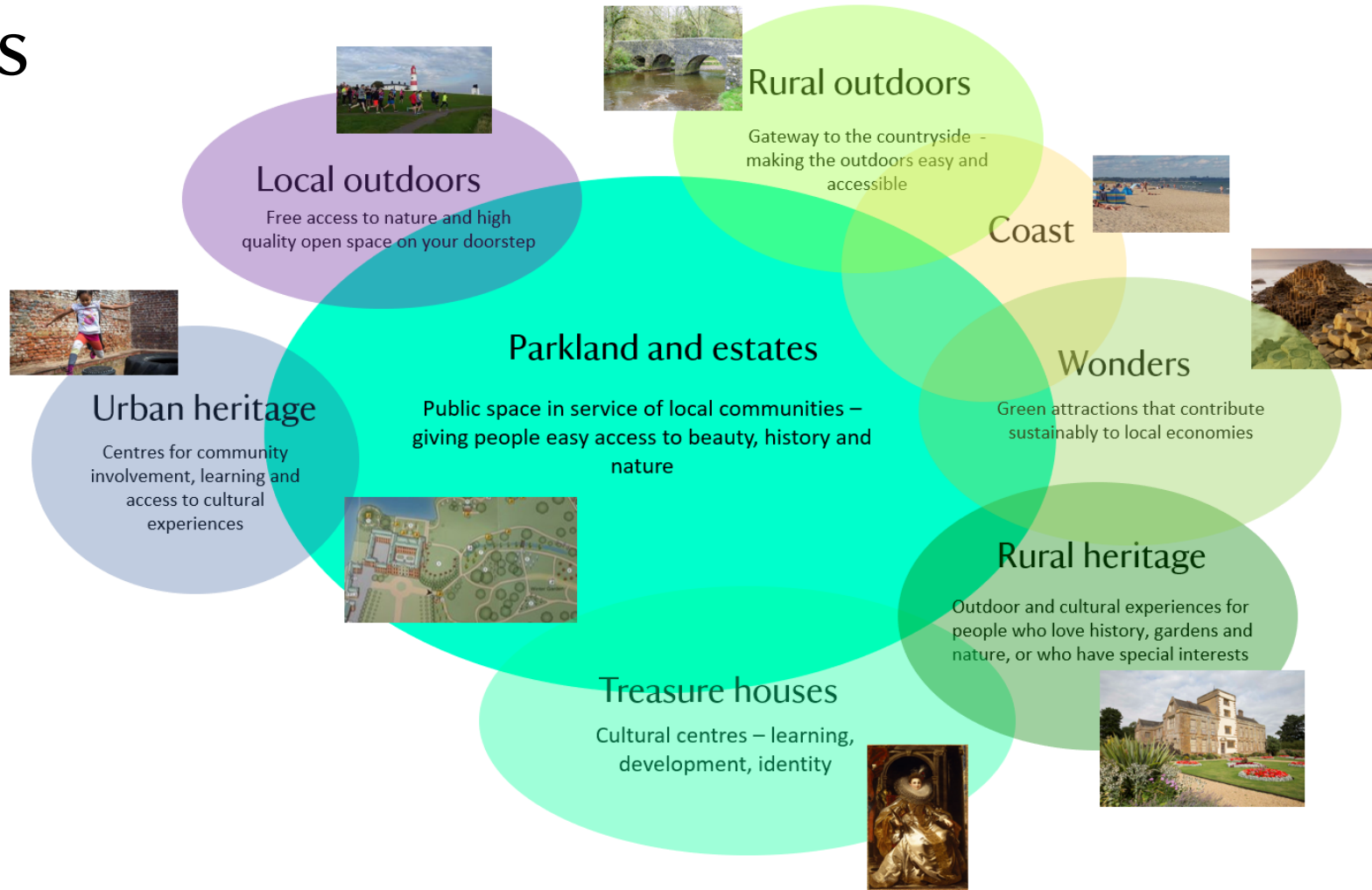


Integration

Differentiating places

Our current approach emphasizes the need to ensure that we deliver the same basic proposition and opening arrangements in as many places as possible. Our offer in future should focus on the diversity of our places – allowing us to provide a range of different offers for different audiences, interests and needs. The existing differentiation model is our starting-point.

Differentiation has implications for how our places evolve, for our opening times and arrangements, the type of business model at different places, and for the way in which we prioritise and allocate resources.



Part of an ecosystem

We've tended to think of our experiences as self-contained – how we control a visitor journey within the pay barrier. But the changes we want to make – with the emphasis on benefit to communities and individuals, on local connections and working through partners – mean that we will increasingly think of them as part of a wider ecosystem.

That means we will think more about how our model for experiences works through places beyond our boundaries (the Heritage Open Days model is a good example), and how we rely on partners to deliver programmes and services rather than trying to control the whole offer. We will seek, first and foremost, to provide opportunities rather than services – to open up potential rather than close it down to the range of activities we define and supply.

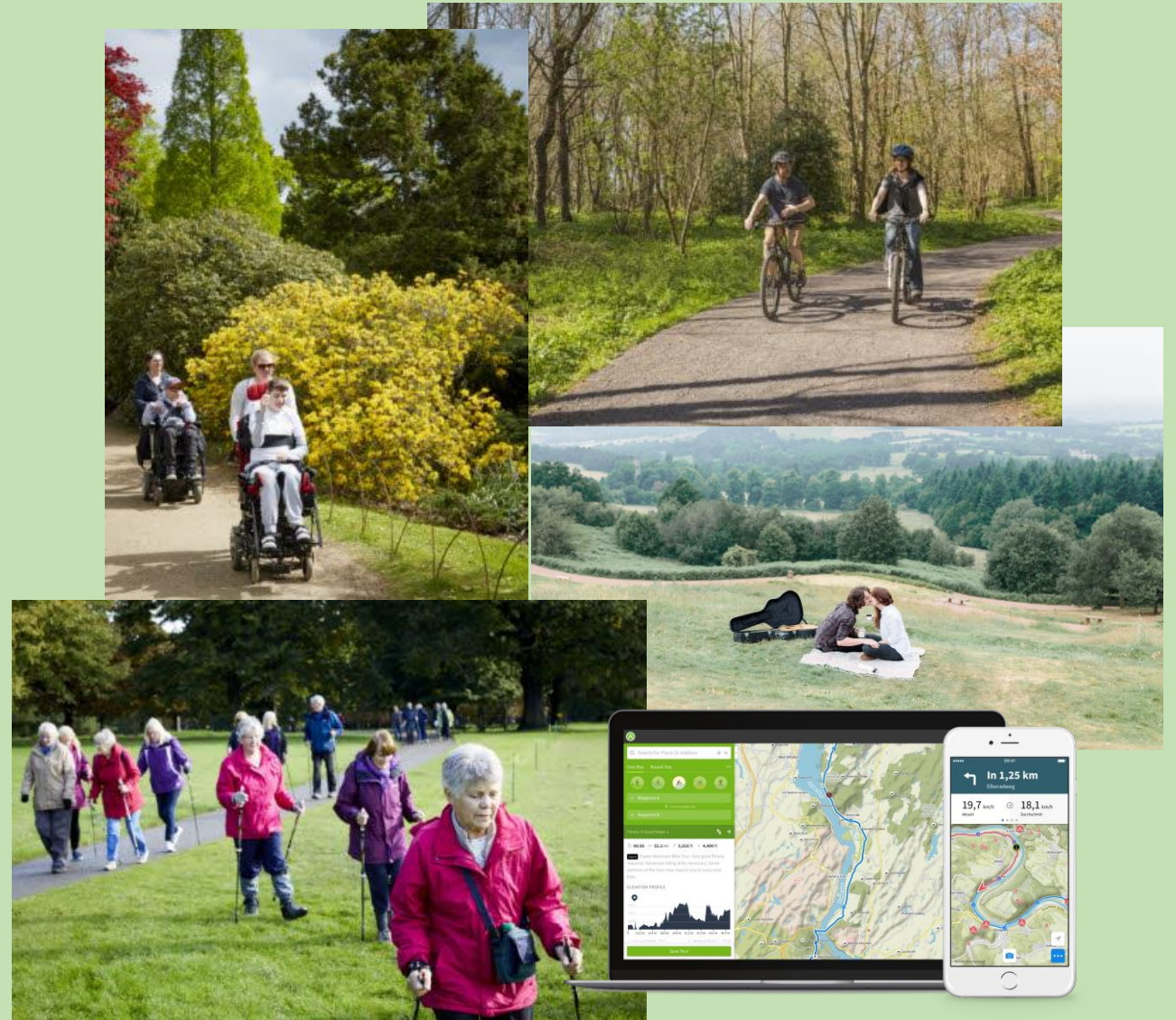
So we'll look to extend the benefits of local access to nature by working with partners to open up green corridors beyond our boundaries in urban areas, for example. We'll increasingly look to join up sites through green access routes. And we'll move away from delivering activities and programmes directly, and increasingly seek to do this through partners. So skills in partnership and participation will become more important – and we may need less specialist resource in areas like learning, sports, arts commissioning and outdoor activity.



Accessibility above all

We will be, above all, the gateway to nature, beauty and history for everyone. We will, of course, continue to welcome the enthusiasts, the specialists, the experienced and the cognoscenti. But what will set us apart is our ability to make people feel safe, to remove barriers and to make it easy to access, explore and enjoy.

That has big implications for where we put our resources and energy: we will invest more in entry-level facilities – like multi-use trails - than in, for example, challenging routes or specialist exhibitions. We will seek to be the leader in access for all abilities. And digital will play a central role in making it easier for people to plan their experiences and to feel confident and safe in the outdoor environment.



Rooted in community

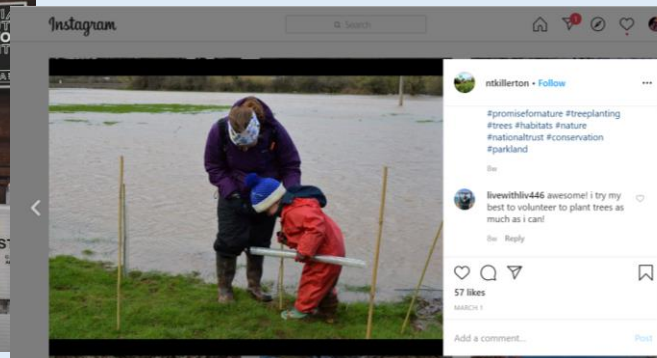
We are a national organisation – what makes us unique is the sheer number and spread of the places we care for. But our primary audience focus will be local. At most of our places, we will devote most of our resources to building long-term, deep and sustainable relationships with people who live close by. That will allow us to better manage the carbon impact of visiting, by reducing journey times and increasing non-car access. And it will allow people to deepen the connection they have with our places beyond occasional leisure visiting: personal development, activity, wellbeing, play, volunteering and involvement.

Integration

For most of our members, the visit remains their only point of connection to the Trust, with our communications and online offer providing only the information they need to plan the visit.

Moving forward, we will build much closer integration between the experiences people have at our places and the experiences they have with us through other channels. Increasingly, we want people to explore their membership across both the visit and multiple offsite channels, making links across connected areas like gardening, outdoor activity, nature and themed programming.

This will tie into our strategy for programming: the connections people have with us across multiple channels will define our identity and much of our core engagement activity (in the same way as, say, Fifty Things or Easter does today). A more differentiated property offer will give us much more flexibility in ensuring that nationally coordinated activity can easily be tailored for different sites, and open up more opportunities for external funding.





Sustainable business model

We can't suppress people's need to be in nature and beautiful places, or ration it. If we're to carry out our charitable purpose of helping everyone to benefit from nature, beauty and history, we have to find sustainable ways of managing growth.

Right now, the load is unevenly spread, which means we sometimes struggle to manage visitor volumes peak times – while having plenty of spare capacity throughout the rest of the year. We are highly vulnerable to weather, and it's hard for us to flex our costs to cope with rapid changes in demand.

But our future way of operating will help us to spread and manage the load more effectively. That means we will be better able to disperse and spread visitor pressure, opening up more access to broader estates and farmland wherever possible. It means we will focus investment and resources at those places where we are best able to manage the impact and reduce opening costs and manage capacity more actively at smaller sites.

Better use of indoor spaces, and the shift from a reliance on days out to more flexible community use,

will help us to spread the load more evenly across seasons and weather conditions

We will have more ways of increasing the returns from our visitor business without loading additional volume - adding value to visits, for example, so that people who are prepared to pay more for more specialised experiences are able to do so. And we will look to generate more return from our programming activity, through added-value events and partnerships.

More of the programming that drives our visitor business will be coordinated nationally. That'll mean less duplication of effort and open up much better access to corporate funding and creative partnerships – and it will free properties up to focus on local partnerships, community involvement and programmes that draw best on the stories, collections and special qualities of each place.

Implications

Outdoors

We'll focus on making the outdoors as easy and as accessible as possible. The key investments over the next ten years will be:

- Physical access
- GPS mapping of trails
- Ensuring the core components of our outdoor proposition are in place at all explore sites (including multi-use trails, F&B and good basic facilities)
- Working with partners to deliver activity and programmes to draw in new audiences
- Building connectivity beyond our sites – via long distance trails, green corridors and public transport links
- Align resources where benefit is greatest (particularly local outdoors)
- Developing new sources of experience-based income, with strong focus on grants and fundraising: we will build our capability to exploit the potential for grant funding to support partnership and community work



Parkland and estates

These will continue to be the focus for our visitor business operation, and the places where we have the greatest ability to manage and disperse volume. Increasingly, we will build on the destination estates model to spread our visitor business across whole estates, using distributed hubs to manage the impact of visitor pressure.

This will open up some big opportunities:

- Creating the critical mass we need to develop new forms of access and transport beyond the dependence on private cars
- Create multiple forms of access and engagement, so that we can manage a range of different offers within the same site – that means we can target our audience by geography (which enables us to serve local communities more sustainably) rather than by interest (which means we can only grow by drawing in audiences from further afield)
- Create integrated landscapes where the emphasis is on public benefit rather than production – combining elements like holidays, activity, play, learning, community facilities, participation and partnership businesses. This integrated approach will allow us to play a much bigger part in the life the communities around our key sites

Gardens

Gardens will increasingly change from being living museums for passive display, to places where diverse communities connect, relax, and share the job of gardening. Horticulture will become the **purpose** rather than just the means to a display and gardening heritage will be regarded as the activity rather than an historical asset.

Gardens will be places to escape **from** the world to seek tranquility and wellbeing, but also places **of** the world where contemporary challenges like climate change are acknowledged and tackled. Our gardens will reflect our distinctive values of beauty, history and maximum accessibility.

We'll be much bolder in our approach to garden design – with the confidence to extend tradition to the 21st Century to meet new visitor expectations. Where appropriate, this will mean developing a new, more relaxed, garden 'aesthetic' free from existing styles and expectations - so some gardens will become more playful in themselves, rather than relying on generic add-on play areas for children and families.

Skills development and training will be an increasingly important purpose for our gardens. This will be across a wide range of interests from technical horticulture to artistic and wellbeing.



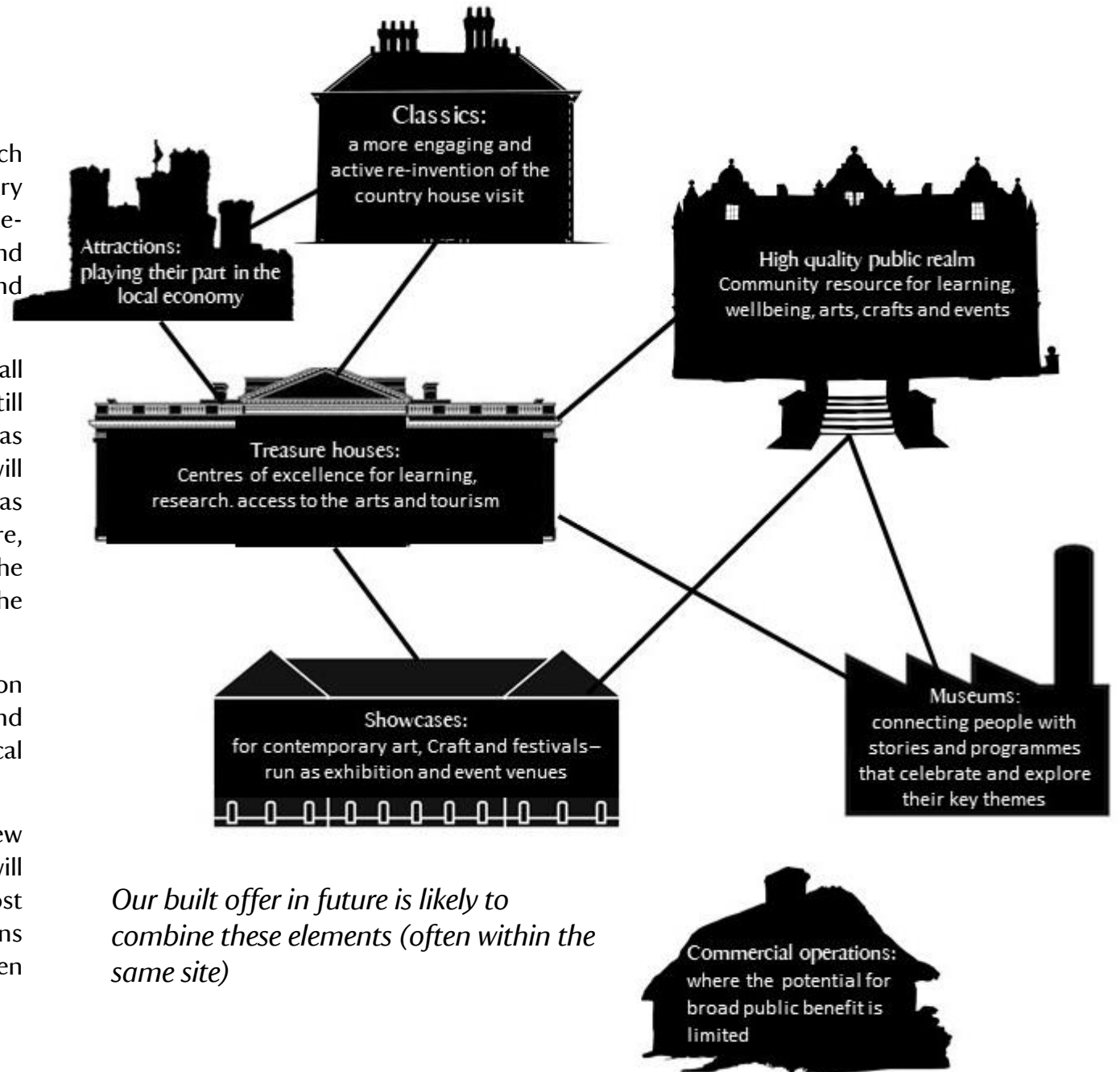
Built properties

The big shift we need to make is away from an asset-led approach (our primary role is to preserve and present the English Country House as a distinctive part of our national heritage) to an audience-led approach (we care for places that are rich in beauty, history and cultural value: our role is to make these attributes valuable and useful for as many people as possible).

That means we have to move away from the assumption that all houses are presented as 'country house former homes'. We'll still have some of these, but they'll be very clearly signalled as 'traditional' experiences for specific audiences. Many, however, will be repurposed as public space in service of local audiences, as places to find out about craft, horticulture, history, architecture, and personal identity, and places to participate in and discover the things that interest our audiences (this will mean re-thinking the purpose of 'spirit of place').

Everywhere, though, we will move away from our narrow focus on family and art history, and explore the wider stories and connections that these places open up - from archaeology and local communities to colonial links and social history.

But we won't replace one way of presenting houses with a new standard approach: in the future, each of our historic buildings will define its own purpose, drawing on the things that make it most special and valuable. And we will re-vitalise our collections presentation offer to make it more accessible, with less on open display.



Our built offer in future is likely to combine these elements (often within the same site)

First steps: what we need to do next

We need to build towards a future where the experiences we offer are more differentiated, and with much greater emphasis on ease of access and broad appeal. These are the things we need to focus on in the short term:

Differentiating the offer is a priority

Differentiation is a big enabler of the changes that will follow, so we need to focus on moving this forward quickly. The first elements to focus on will be local outdoors, destination estates and creating a much more flexible and low-cost approach to smaller mansions. A review of opening arrangements – and how the offer is presented through the handbook, app and website – will be vital.

Investing in the outdoors

Our priorities are likely to be a. physical access and b. enabling technology for GPS-based mapping of outdoor access.

Active outdoors will continue to be important, but we should focus the next phase of Sport England funding on building infrastructure across key sites and setting us up for more effective partnership working beyond the grant period.

Changes to programming

There are big implications for our investment in programming. We may need to scale back on our investment in programming for niche audiences (including exhibitions and contemporary art), and focus on easily scalable initiatives that open up access to potential partnership funding and reduce pressure on properties

We will build a responsive, integrated national programming operation that will be the main focus for building our visitor business. It will draw together our approach to seasonal, the family offer, corporate funding, creative partnerships and content across multiple channels, working in a matrix way rather than as a separate team.

Our focus on cultural programmes will need to be much more closely aligned to our broader communications activity – again, we'll need a single matrix team working across all channels, rather than a separate focus on exhibitions and property programmes with communications playing a supporting role.

Mansions – from evolution to revolution

The changes we'll need in our built places are revolutionary, not evolutionary. We won't get there by encouraging local innovation and gradual scaling of good ideas, which is how we've approached this up to now. We will need a much more directed approach to change, and these are the first steps:

- We urgently need an alternative to the current mansion opening model – with its unsustainable reliance on large numbers of static volunteer roles.
- Differentiation – so we're really clear about the scope of potential change at each place.
- New guidance on collections - We need to be much clearer about the places where we can begin changing our approach to collections display – moving objects or taking them off display where needed to make spaces more flexible and accessible.
- A major change in collections presentation and storage: without this we'll be unable to flex our mansion offer to create the more active, fun and useful experiences that our audiences will be looking for in future

Following up the organisational development work

We'll need to build on the work we've put in to make sure we've got the right skills in the right place, and make sure it's aligned with our differentiation. At property level, there will be more emphasis on the skills needed to build programmes in partnership with others (and setting ourselves up to work more effectively with grant funding), alongside increasing professionalisation of our operational management.

And the things that won't change...

Continued focus on capacity management, service and getting the quality of our presentation and facilities right. Differentiation will help us to ensure that we make the right choices about where to put our resources.