

Heritage Services Business Plan 2025–2030

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1. Summary

The Heritage Services Business Plan 2025-2030 outlines the Service's strategic vision and mission as we continue to recover from the impacts of the COVID-19 pandemic, adapt to a challenging economic landscape and continue to deliver key Council corporate priorities.

The Service anticipates continued growth in visitors at the Roman Baths in the 25/26 financial year. This will lead to increases in income and profit. Heritage Services is projected to deliver a financial surplus of £12 million in 2024/25, rising to £14.2 million in 2025/26.

This financial success is built on investment in staff and the heritage assets that we care for alongside prudent cost management and entrepreneurial approaches to pricing and revenue generation. To maximise income, plans include increasing visitor numbers and optimising pricing strategies at the Roman Baths, introducing new guided tours, and enhancing the commercial event programme. We anticipate that further successful exhibitions at the Victoria Art Gallery will also continue to boost revenue.

Heritage Services will match this commercial activity with a continued commitment to delivering social value impact across our activities. These are aligned with core Council strategies including the Economic and Joint Health and Wellbeing Strategy. Activities include the opening of a new learning and community engagement space at the Victoria Art Gallery and the continued use of the Clore Learning Centre as a hub for learning and participation in the heart of Bath. We will further encourage the take-up of the Discovery Card scheme, fostering deeper community connections. We will also grow our volunteer cohort.

25/26 will also see us strengthen our approach to supporter engagement. Primarily this will be through the implementation of a new Customer Relationship Management (CRM) system. The relationships with the independent charities that support us will be deepened and we will work in partnership with them to ensure we benefit from philanthropic contributions to our activities.

Operational efficiency will be measured through benchmarking within the Association of Leading Visitor Attractions (ALVA) and a review of the governance structure will update the operating arrangements for Service within the Council. Focus will increasingly be placed on environmental sustainability by improving building efficiency, sustainable procurement, and promoting public and active travel. As always, the Service will focus on the safety, security

and conservation of the buildings and collections in our care. This was demonstrated in 2024 when the Roman Baths was awarded full accredited status from Arts Council England and the Fashion Museum Collection interim accreditation. In 2025 we will move the majority of our reserve collections, associated with the Roman Baths and Bath Record Office, to more suitable storage locations.

The relocation of the Fashion Museum to the Old Post Office will continue to be the key capital project for the Service. It serves as a paradigm for the themes outlined above with audiences, research, collections care, social value and financial sustainability at its' heart.

Heritage Services is dedicated to the delivery of Council Corporate priorities via the preservation and enhancement of the cultural heritage of Bath and North East Somerset. Through strategic investments, innovative initiatives, and a commitment to sustainability, we aim to deliver exceptional visitor experiences and contribute to the region's economic and social prosperity.

2. Service Vision and Mission

2.1. Bath and North East Somerset [Corporate Strategy](#)

Bath and North East Somerset Council (B&NES) has one overriding purpose – to improve people's lives.

The Corporate Strategy has nine priorities for the period 2023-2027. Heritages Services feels that it can contribute significantly to 7 of these through its current and future activities:

- Clean, safe and vibrant neighbourhoods - working with local communities to promote civic pride and preventative approaches
- Support for vulnerable adults and children – securing safe, effective services that meet the needs of our changing population
- Delivering for our children and young people – working with our partners to narrow the early years attainment gap
- Healthy lives and places – working with health and other partners to tackle inequalities, promote healthy places, and support people to live healthier lives
- Good jobs - aiming to increase the median wage in a regenerative economy
- Skills to thrive - an inclusive economy where prosperity is shared
- Cultural life - valuing and developing its contribution to Bath and North East Somerset.

To this end we will be aligning a lot of the work we undertake against key Council strategies. Primarily the [Health and Wellbeing Strategy](#) and the Economic Strategy with the data contained with the [Strategic Evidence Base](#) underpinning how we direct many of our activities.

We are proud to be a Service that is part of B&NES and everything we do is dedicated to delivering on the purpose, principles, commitments and priorities of the Council. This is evident throughout the content of this plan.

2.2. Vision

A document outlining the Service's strategy 2022 – 2027 can be found [here](#).

The Service's vision is to: **Learn from the past, understand the present, shape the future**

There are three over-arching aims to achieve between now and 2030:

- Return the Service to pre-COVID profitability;
- Move the Fashion Museum
- Achieve Net Zero.

2.3. Mission

The Service's Mission is to:

- Create memorable, relevant and emotionally charged experiences for local, national and international audiences;
- Conserve the monument, buildings and collections in our care;
- Be supporter centric – building long-term, mutually beneficial relationships with people who engage with us;
- Act commercially to generate significant income from our activities and work to contribute to the wider economic prosperity of the region;
- Offer an unparalleled customer experience for everyone;
- Be a leader in sustainable and responsible practice in the Museums, Heritage and Archive sector.

2.4. Strategic Priorities

The Service has six strategic priorities which it will deliver on over the course of the Plan:

1. To provide maximum access to our buildings, monuments and collection to as wide an audience as possible to facilitate learning, understanding and emotional connection;
2. To be a supporter focussed organisation;
3. To maximise income;
4. To operate efficiently and effectively as an organisation;
5. To bring benefit to Bath, the South-West and the UK;
6. To act as an environmentally sustainable and responsible organisation in everything we do.

3. Business Strategy

3.1. Performance Overview

Roman Baths

Visitor numbers at the Roman Baths have been lower than budgeted in 2024/25. The Service set a budget for 10% growth in visitors during this financial year. During the first half of the year, growth was actually 3.5% and performance over the Autumn was behind 2023/24 visitor levels. Financial year to date (to end November) growth is 1.3%.

Figure 1 below shows footfall relative to budget, pre-pandemic and prior year. At Q3 the forecast for visitors in 2024/25 has reduced from a budget of 1,100,000 to 1,008,000.

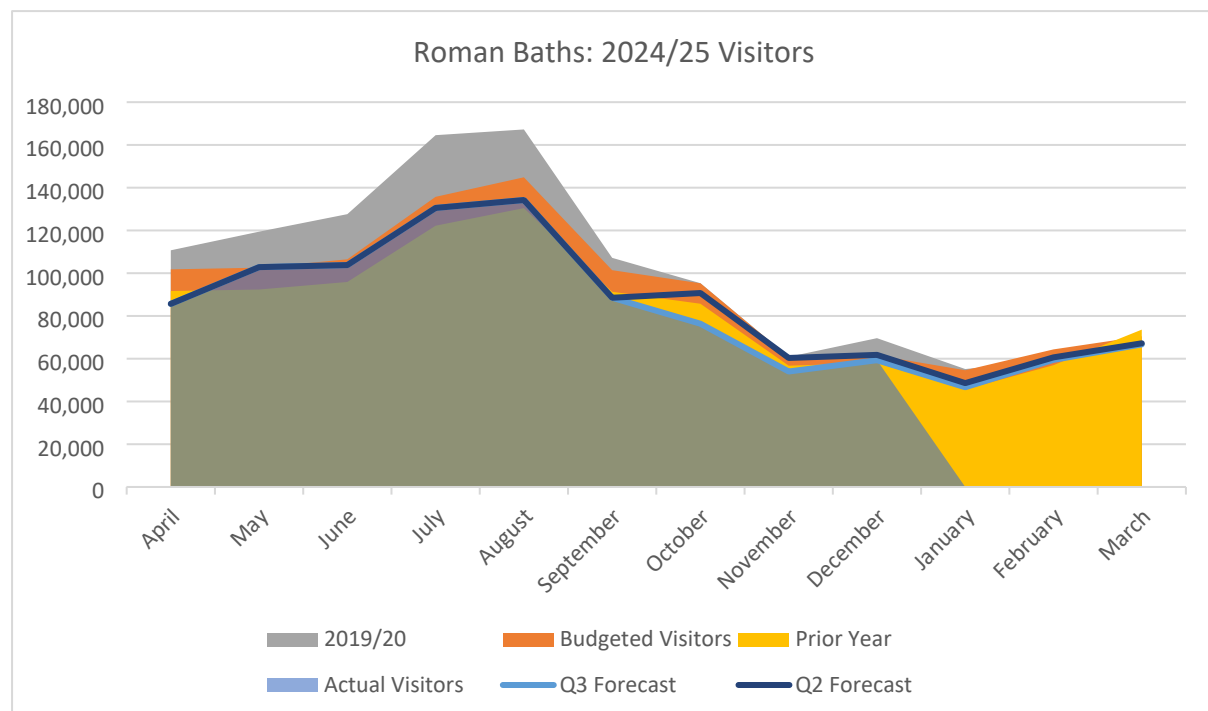


Figure 1: 24/25 Financial Year Roman Baths visitor numbers¹

The chart below provides a longer-term view of the pandemic's impact and recovery, shown alongside the visitors to Department of Culture Media and Sport (DCMS) funded museums (chosen as comparators due to their high visitor numbers, national significance and large tourist markets and including: the British Museum, Science Museum, V&A, Natural History Museum and Tate).

¹ October's figures were impacted by an enforced closure due to a two-day power outage; the Service anticipates that losses during this period are insured and is working through the claim process.

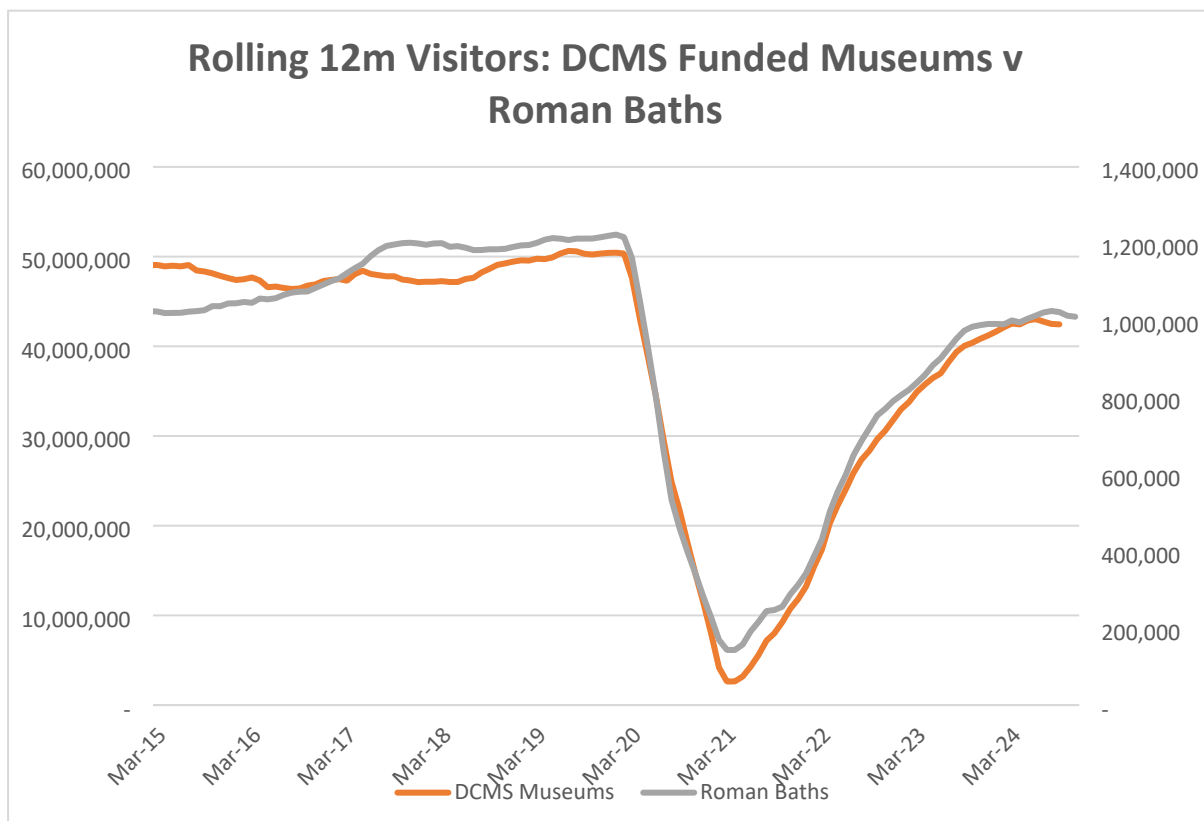


Figure 2: Rolling 12 month DCMS funded museum and Roman Baths visitor numbers

Figure 2 shows that over the 12 months to November 2024, the Roman Baths has seen very similar growth in visitor numbers to the DCMS museums; both have recovered to 84% of their pre-pandemic visitor numbers.²

The DCMS chart in figure 2, demonstrates that the slowdown in Roman Bath's COVID recovery, is mirrored across the sector; the strengthening of GBP against both USD and EUR has contributed to a decline in inbound tourism over the Summer and Autumn and inflation pressure is having an impact on domestic tourism. The mainland Chinese market is also still to return to pre-covid levels. Across the Association of Leading Visitor Attractions (ALVA), median growth fell for four consecutive months from July – October and the calendar year and the median growth rate for the calendar year to November stands at - 0.6%. The Roman Baths has outperformed this median figure and has seen growth of 1.7%

² More broadly, the chart sets some of the longer-term context for the Roman Baths, in the build up to COVID. The Brexit referendum (and weakening of GBP) drove a steady increase of visitors to both sets of attractions. The impact of terror attacks in 2017, saw a switch out of London, this chart shows that switch very clearly in May – Aug 2017. Then COVID, which came just after the Roman Baths' busiest ever year. The fuller impacts of the pandemic have been set out in previous versions of the Plan and are not repeated here.

over the period. A more detailed analysis of the issues facing the Roman Baths in 24/25 is included in Appendix 4

Whilst people are taking fewer trips, spend per trip is higher, as people focus on deliberate memory making in special places. This is evidenced in the performance of the secondary spend at the Roman Baths, despite visitor growth sitting at just over 1%, retail sales are up 3% and spend per diner is up over 4% in the Pump Room.

Visitor Experience scores at the Roman Baths have exceeded both target and prior year scores and, in the most recent mystery visit, the Roman Baths scored 96.5%, in the top 5 scores for all participating attractions in 2024.

	Apr-Nov 2024	Apr-Nov 202
Visitor Enjoyment	8.80	8.68
Value for Money	8.00	7.95
Net Promoter Score	+ 62	+ 60

Figure 3: Roman Baths Visitor Experience Scores 2024/25 v 2023/24

In 2024 there were over 1,000 people supported by smaller, focused community engagement activities through the Roman Baths. In addition, during 2024 - 2025 the Service has worked with the Carers Centre, Headway (a charity supporting people with brain injuries), Scouts and Girl Guides, amongst others. The Roman Baths Youth Forum was established, as well as a regular programme for refugees working with the B&NES Council Resettlement Team. A major success of 2024 has been the establishment of a health and wellbeing course, which has supported local health and social services through social prescription. This course has led to a reliable support network and space for vulnerable local people who meet onsite monthly. The Service has also worked in partnership with Council Colleagues to be part of the Holiday Activity and Food Programme which provides healthy meals, enriching activities, and free childcare places to children from low-income families, benefiting their health, wellbeing and learning. School visits to the Roman Baths continue to be popular, making full use of the new Clore Learning Centre and interactive Investigation Zone winning the Learning Team Best Historic Attraction by the School Travel Awards and Active Learning Experience of the Year at the Bristol Bath and Somerset Tourism awards.

World Heritage Centre

The World Heritage Centre is expecting to welcome around 100,000 visitors in 24/25. The Centre recently won Gold for Visitor Information Service of the Year at the Bristol Bath and Somerset Tourism awards.

Victoria Art Gallery

The Victoria Art Gallery has had an outstanding year, visitors to paid exhibitions are up over 55% on prior year. The *Masters of Montmartre* exhibition was the most popular paid exhibition that the Victoria Art Gallery has ever held. The show attracted 29,808 visitors during the 5 month period, of which almost 21,000 were paying.

The Upper Gallery has remained closed throughout 2024/25, due to the complexity of repairs to the historic roof. It is scheduled to reopen in Spring 2025 along with a new learning centre that will enable a vibrant programme of activity, including school workshops, community groups use and family events. The chart in figure 4 below reflects the fact that the Upper Gallery was expected to be open when the budget was set. Visitors during 2024/25 have exclusively been exhibition visitors, the budget for exhibition visitors is shown in the grey line and has been exceeded throughout the year.

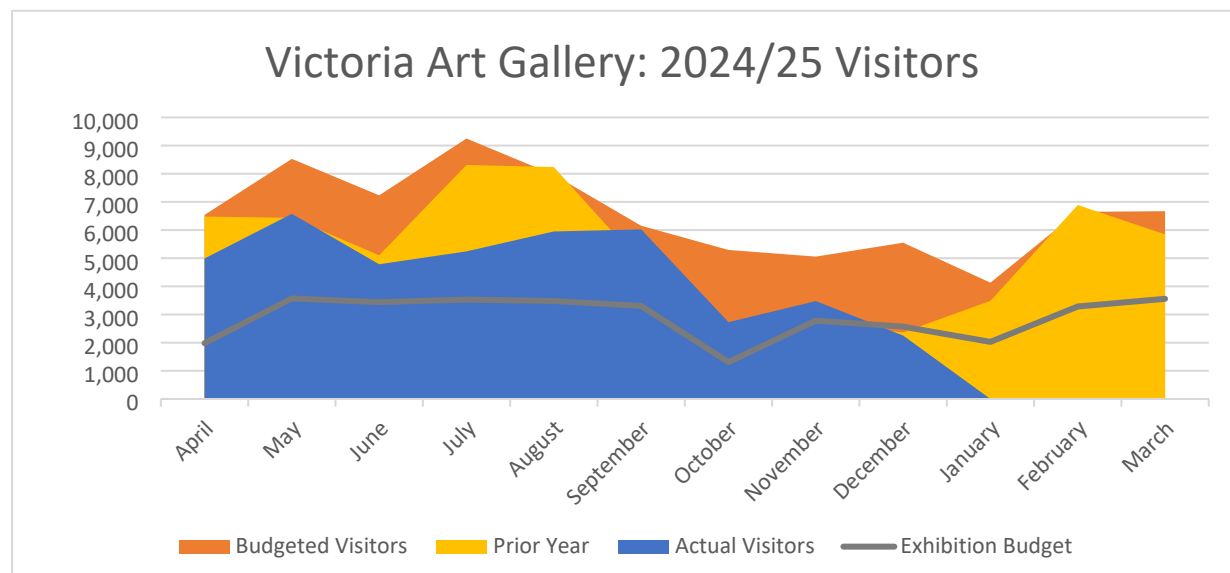


Figure 4: Victoria Art Gallery Visitor Numbers

Fashion Museum

Whilst the Fashion Museum is now closed, we have continued to loan objects from the collection to major fashion exhibitions across the world. In 2024 over 1.1m people saw Fashion Collection objects across the UK and around the world, with notable loans to Tate Britain, Blenheim Palace, the Garden Museum and V&A. Future loans will underpin major exhibitions in New York and Paris.

Financial Contribution

The lower than budgeted footfall at the Roman Baths has resulted in a lower than budgeted admission income. However, mitigations in the strength of performance at the Victoria Art Gallery, other income generation and cost control measures mean that the majority of the income shortfall has been mitigated.

3.2. Future targets

The financial summary and key future targets are set out in appendix 1 and 2 respectively, alongside the prior year actuals and current year forecast. Figure 4 below shows the expected recovery of both income and profit.

The Plan projects growth in visitor numbers and visitor-driven income from the current performance outlined above. Heritage Services returned the highest surplus it ever achieved in 2023/24 and is forecasting to increase that by 11% in with 2024/25 and by a further 15% in 2025/26.

	2023/24 (actual)	2024/24 (Q3 forecast)	2025/26 (proposed)	2026/27 (proposed)	2027/28 (proposed)	2028/29 (proposed)	2029/30 (proposed)
External turnover (£000)	24,649	26,339	30,167	31,077	31,835	32,610	33,485
Net Profit (£000)	11,112	11,991	14,193	14,215	14,468	14,468	14,468
<i>Profit as a % of income</i>	45.1%	45.5%	47.0%	45.7%	45.4%	44.4%	43.2%

Figure 5: Heritage Services income and profit

It should be noted that visitor numbers projected in 25/26 (1,100,000) and therefore the surplus of £14.139m is at the upper end of estimates.

The actual visitor figures outlined in section 3.1. appear to show that the period of rapid growth driven by the COVID recovery has concluded. Actual visitor numbers in 2025/26 will be used to update long-term projections for visitor numbers and therefore income in future years. Regardless, the physical constraints of the Roman Baths restrict uninhibited growth in visitor numbers and therefore in the outer years of the plan the surplus is expected to plateau. Assessing how soon this peak will be reached and whether the plateau apparent in figures for the Roman Baths and the wider sector in 24/25 is permanent or temporary, is difficult and is further commented on in section 4.

The financial targets for the Service absorb the recent increases in pay and further anticipated pay awards to be agreed by the Council for each year of the plan, as well as other inflation pressures on the cost base. With the future anticipated rises to the living wage, pay is expected to be the biggest cost pressure facing the Service.

Previous iterations of the Business Plan noted that Heritage Services would retain over-achievement to act as a smoothing reserve to support capital funding requirements in the future. The Council has now taken the decision that future capital requirements will be met through debt finance.

3.3. Action Against Strategic Priorities

3.3.1. To provide maximum access to our buildings, monuments and collections to as wide an audience as possible to facilitate learning, understanding and emotional connection

Following a successful pilot the Service will continue to offer free admission to schools where 30% of pupils receive free school meals. The Service will introduce a £1 ticket for those in receipt of Universal Credit and will continue to provide tickets through [Tickets for Good](#). These measures are designed to attract new audiences, who we have not traditionally welcomed to our site, from outside of the local authority area. This activity, the provision of access to culture to those for whom price represents a significant barrier to entry, aligns with the priorities of national funding bodies such as the National Heritage Lottery Fund, Arts

Council England and independent trusts and foundations. It also offers a strong connection to the West of England Combined Authority's cultural plan. The financial impact of these activities will be very limited.

In 2024 the Service launched a new audio-tour at the Roman Baths in-line with the most up-to-date understanding of Roman Britain. Through a successful funding bid to the Arts and Humanities Research Council, the Roman Baths, in partnership with the Universities of Exeter and Reading, are supervising a PhD candidate to undertake further research into the site and collections. By facilitating and supporting further external research, and through its own research, the Service will continue to reinterpret this significant scientific and historical site.

The community engagement programme will continue to maintain and create sustainable relationships and activities. This includes the refugee programme, Roman Baths Youth Forum, partnerships with the Carers Centre and Headway, as well as other local community groups and charities. There is a desire to expand this to include Bath Mencap and other organisations as part of the site's Audience Development Plan. Health and wellbeing activities will be developed further, reaching a wider audience through social prescription, and continuing the support of internal B&NES services such as Public Health and Children's Services.

Although the Fashion Museum is without a physical location during this period of capital development, work is underway to ensure the Collection is accessible to the public. Collection visits, an ambitious loans programme as well as workshops and events will ensure that Fashion Museum Bath is never far from people's minds. *Explore the Collection* is a digital innovation project which will launch in early 2025, part funded by Arts Council England. The first stage will focus on the Dress of the Year Collection combining collection data with multimedia and rich narrative-based content revealing the extraordinary stories that each object can tell. This project will be delivered with B&NES Library Services and will be co-created with local young people in Bath and North East Somerset (BANES).

A programme of temporary exhibitions will continue to be delivered at the Victoria Art Gallery.

- **Mirror of Mirth: Rowlandson & Nixon Satirise Bath** 24 January – 21 April 2025
- **First Impressions: Trial Proofs of Prints by Great 20th-Century Artists** 2 May – 6 July 2025
- **The Lost Spells** 18 July – 5 October 2025

- **Bath Society of Artists 120th Annual Open Exhibition** 19 October 2025 – 10 January 2026

Following the completion of the roof works, we will also open a new learning and community engagement space in Spring 2025. As outlined in last year's Plan, this new room has been externally funded and will allow us to drastically improve the community engagement offer at, and social benefit that can be derived from, the Victoria Art Gallery.

Bath Record Office: Archives and Local Studies will continue to develop its audience development plan so that the archives and local studies collections can reach wider and more diverse audiences. In turn, this will improve its collecting strategy and ensure its continuing relevance to our communities.

3.3.2. To be a supporter focussed organisation

The Service will implement a Customer Relationship Management System alongside a new Visitor Management System (CRM and VMS). This system was tendered in 2024 and will be deployed in 2025, this will give the Service the ability to systematically manage and analyse visitor data, providing valuable insights into their preferences, behaviours, and engagement patterns. Our marketing approach will evolve to tailor our offerings and communications to meet the specific needs and interests of our various audience segments.

At the end of 2024 we had issued over 47,000 Discovery Cards to residents, following the scheme's relaunch in 2022. In 2024 the Service developed a technical solution to allow Discovery Cards to be issued in the community, removing the need for residents to attend one of the Heritage Services sites, or a One Stop Shop to obtain a Discovery Card. The management of the Discovery Card scheme will be transferred to the new CRM in 2025 and the Service will continue to promote the scheme to residents across B&NES.

3.3.3. To Maximise Income

Heritage Services will seek to maximise income generating opportunities across its areas of operation.

Roman Baths

- **Additional visitors.** The Service is budgeting for 1.1million visitors in 2025/25, an increase of around 90,000 from the forecast in 2024/25.
- **Ticket Price.** Price increases planned for 2024 will raise the price for both individuals and groups at all points during the year.

- **Price structure changes.** Through changing the effective price points at different points in the year, these changes follow a full review of Roman Baths pricing strategy in 2024. The specific changes planned are to:
 - Remove the cheapest price point in the year
 - A higher increase at weekends in the peak period
 - An “on-the-day” surcharge June – August
- **Additional product offering.** Building on the successful introduction of paid-for guided tours in 2024, the Roman Baths will increase the number and range of tours offered.
- **New catering contract.** The retender of the catering contract for the Roman Baths and Pump Room has led to an increase in the effective commission rate for day catering and event catering.
- We will continue to ensure that experience is at the heart of our product offering, using the site and collection as the backdrop against which people can create amazing memories. We will do this through a range of interventions:
 - Sensational Museum Project, a grant funded project which will introduce multi-sensory interpretation of bathing experiences in the East Baths.
 - Archaeology Adventures, a new family activity in the Clore Learning Centre.
 - Continue to work with our costumed interpreters, the Natural Theatre Company, to create new ways of engaging the public.

Victoria Art Gallery

- Re-open the Upper Gallery to support overall site visitation.
- Introduce a family ticket to support the growth of this audience at the Victoria Art Gallery.
- Use the capabilities of the new Visitor Management System to explore cross site promotion between the Roman Baths and the Gallery to try and drive more visitors from the Baths to the Gallery.

Cross Service

- Commercial event programme to deliver revenue through ticketed events and concession catering income. Programme to reflect key anniversaries, such as Jane Austen 250th anniversary and will include dinners, silent discos, murder mystery evenings, Christmas party nights and comedy nights.

- Continue to maximise revenue through the private hire of the Council's heritage venues and parks, delivering a high-quality experience for all external and internal clients.

3.3.4. To operate efficiently and effectively as an organisation

During 2025 the Service will review and update the decision taken in 2005 to establish Heritage Services as a business unit within the Council. The Service will use the Heritage Advisory Board as part of the review of its governance, using the experts on the Board to provide supportive challenge to the priorities and strategies of the Service. The Service will add a finance representative to the Board who can specifically add rigour to the sign-off of the Service budget.

The Service will continue to benchmark its performance within ALVA, to provide assurance to the Council that the Service is delivering value for money.

The Service will sign off a 3-year heritage maintenance and conservation programme which will begin to implement the recommendations of the Conservation Management Plan (CMP). Alongside this, the Service will engage in the Council's Corporate Landlord project, ensuring that the Council realises its ambition for a central overview of its estate, exploring opportunities for efficiency in the delivery of maintenance and compliance activity, whilst safeguarding the Service's ability to be agile and responsive in the management of its built assets and infrastructure.

The Service will implement its Equality, Diversity and Inclusion (EDI) strategy, which was developed during 2024. This will involve all employees receiving EDI training, embedding EDI within our staff induction and the use of a staff group to hold management accountable for the completion of the action plan. The EDI strategy will also be fundamental to the narrative development across our sites as we seek to present a full and inclusive view of the past, as told by our sites and collections, based on the most up-to-date research.

Elements of the Services' historic collection, which are currently stored at Culverhay, will be moved to a more appropriate storage location, providing a more stable environment for these historic items. The Service has leased two warehouse locations for this purpose and the collections will be moved during 2025. This will release the Culverhay site to be developed by the Council for the provision of education services for pupils with Special Educational Needs.

An integral part of the strategy going forward will be ongoing investment in the Service workforce. We will continue to build an even stronger performance culture with staff engagement, wellbeing and development at its heart. This will include engaging with the new Council management training resource to develop management capability and consistency across the organisation. The Service will continue to evaluate its staffing complement and structures to ensure that it is able to deliver on the Strategic Priorities outlined in this document.

3.3.5 To bring benefit to B&NES, the South West and the UK

Heritage Services will use its platform and influence to:

- Represent B&NES on the West of England Combined Authority (WECA) [Cultural Compact](#) to deliver on the WECA cultural strategy;
- Represent B&NES as a board member of Visit West and work with Visit West to deliver the [destination management plan](#) for the region;
- Represent The Roman Baths and Pump Room as a board member for the Association of Leading Visitor Attractions;
- Work to establish a Corporate Approach to Culture across B&NES to deliver the Corporate Strategy priority to value and develop the cultural life of the district.
- Work with key services across the Council to deliver B&NES's corporate strategy. By working in partnership Heritage Services can play a pivotal role in the city's economic, cultural and social future, creating increased access to some of the world's great cultural assets. It will also deliver regeneration, economic, skills, placemaking, health and wellbeing benefits across the wider region
- Continue to provide opportunities for volunteering throughout the Service. Through these opportunities support and grow our volunteer cohort that support the Service deliver its objectives and enhance community wellbeing. Volunteering offers numerous benefits, including improved physical and mental health, reduced stress, and a sense of purpose. By fostering social connections and skill development,

Heritage Service contributes to the wider Council's prevention objectives, promoting healthier, more resilient communities.

3.3.6 To act as an environmentally sustainable and responsible organisation in everything we do

Over the last 12 months, the Service has made progress in this area. The Service now has a clear understanding of its direct and indirect carbon impacts, having 3-years of carbon emissions data to available. With a Sustainability Manager now in place, the Service is able to continue to monitor and measure the reductions in carbon emissions each year.

Building from the previous work conducted in 2024, we have several workstreams in progress;

Facilities:

- Performance analysis on current heating and optimisation of the Roman Baths Heat Exchange System to further reduce gas usage
- Identification of low-cost electricity optimisation projects for the Roman Baths (including lighting replacement).

Procurement and Food & Beverages

- Engagement with suppliers to encourage their move towards more environmentally sustainable practices including the production of a guidance pack and drop-in sessions to grow awareness and support with sustainability data gathering
- Regular communications and data collection from catering partner Searcy's

Travel

- Establish a new method for understanding and decision making relating to object loans
- Exploration of First Bus partnership for integrated Park and Ride and Roman Baths tickets

With 3-years of emissions data we can start to quantify how Heritage Services will reach Net Zero by 2030. Due to the evolving nature of emission factors, strategic priorities and budgets we have set out Sustainability Goals to be reached by 2027. The targets in Appendix 3 are ambitious but evidence-based, and informed by tangible projects (subject to funding) and

works already in progress. In 2027, the sustainability goals will be refreshed for another 3-years carrying us through to the 2030 milestone year.

3.4. Fashion Museum Bath

3.4.1. Project overview

The Service is progressing with the plan to establish a new Fashion Museum in Bath City Centre, in the Grade II listed Old Post Office. The project will:

- Create the only museum in the UK dedicated to fashion heritage
- Reinvigorate the Fashion Museum Collection as a relevant and vital resource for Bath and North East Somerset residents as well as domestic and international audiences.
- Create dynamic social and civic spaces accessible to all.
- Deliver a benchmark standard of environmental and economic sustainability in its delivery and impact.
- Create a transformational museum which is an agent of societal change – locally, regionally and nationally.

The project aligns with the Council's corporate vision to 'improve people's lives and its strategic priority to create a vibrant cultural life in BANES.

It is a key component in the Council's future economic strategy and its Joint Health and Wellbeing Strategy.

The Fashion Museum will play a pivotal role in the economic, cultural, and social future of the city, preserving and creating increased access to one of the world's great museum collections as well as delivering regeneration, economic, skills, placemaking, and wellbeing benefits across Bath and North East Somerset and the wider region.

Fashion Museum Bath is an anchor element of the Milsom Quarter Masterplan. It will help 'reimagine the high street' in the city centre encouraging commercial tenants and residents to move there and making the area a great place to live, work and socialise.

The Museum

The Council has acquired the Old Post Office building within the Milsom Quarter of the city. This will be the new home of the Fashion Museum with flexible exhibition spaces to display more of the collection than ever before. Dedicated spaces for learning and engagement, integrated café and retail areas will provide a shared and welcoming social space in the city centre. The Museum will also be an exemplar of sustainable retro-fit. The project will bring back to life a renovated heritage asset, creating a permanent home for this internationally significant collection.

In May 2024 a full design team was appointed and throughout 2024, feasibility and design work was undertaken and RIBA II concept design completed. We anticipate the museum to open in 2030 with construction on site in 2027.

An economic impact appraisal has been conducted with a BCR of 3.15:1 which falls into the 'high' value for money category.

The Fashion Museum Foundation has been created as an independent charity to support the project.

Social Value

The aim for the Museum is for inclusive cultural engagement – with programming and activities targeted at communities across BANES. Fashion Museum Bath has developed an Activity Plan which aligns with core Council policy. This sets the audience engagement priorities and will provide cultural, educational, health and wellbeing, skills and career development opportunities for residents, particularly those experiencing socio-economic or health inequalities, with supporting digital activity to engage audiences and build community.

The target audiences for Fashion Museum Bath are:

- People living with health issues in BANES
- Families with young children, in particular those facing socio-economic inequalities and poverty
- Vulnerable young people in care, those who are not in education, employment or training (NEET)
- BANES secondary school students and teachers

The project will impact the local community by:

- Being a welcoming and inclusive space for community participation and co-creation with a strong programme of events and activities that will generate a sense of belonging and civic pride.
- Welcome thousands of schoolchildren per year by providing a new cultural destination for school visits in Bath.
- Partner with Bath Spa University, Bath College and other educational institutions to develop skills and training programmes for improving pathways into the fashion industry and wider creative industries.
- Offering new apprenticeship opportunities which support upskilling and reskilling.
- Providing a range of volunteer opportunities that will suit a broad audience.
- Introducing new audiences to cultural experiences through the universally fascinating topic of fashion.
- Offering creative activities that support health and wellbeing.
- Provide free entry to B&NES residents and schools so there is universal access to these benefits.

3.4.2. Interim storage and engagement

Whilst a new permanent home is created the collection is housed at Dents glovemakers, one of the UK's leading heritage fashion brands. The costs associated with this storage are built into the Plan.

3.4.3. Project costing and overview

A provisional capital budget was added to the capital programme for the financial years 2024/25 to 2028/29 for Fashion Museum Renovation. As part of further work to progress with the Museum design we will further develop the capital programme. The funding plan for the project is as follows:

- The Old Post Office site was acquired in 2021/22. This was funded via a repayable capital grant from the West of England Combined Authority Revolving Infrastructure Fund which is planned to be repaid from capital receipts from disposal of Corporate property assets.

- The total provisional capital budget is envisaged to be drawn from service supported borrowing funded from net admissions income, Corporate Supported Borrowing representing Council support and a fund-raising target including future grant applications.
- The Council will make a proportion of this funding available so that design work on the Old Post Office site can continue in 25/26.
- A fundraising campaign will contribute to the remaining project costs. This will include grant applications and third-party contributions.
- Fashion Museum Bath will receive formal gateway approval to conclude RIBA II in January. RIBA III (technical design) will commence in May 2025.

4. Risk

The Services' strong recovery from the COVID 19 pandemic has plateaued, in line with the rest of the sector, over the last 12 months. Through entrepreneurial approaches to pricing, development of additional revenue streams and prudent cost management, the Service has continued to increase profitability and is forecasting to deliver growth in surplus from a broadly flat visitor base.

Whilst Mandarin, Japanese and Korean speaking visitors have increased 9%, 16% and 2% respectively this year, they all remain significantly below pre-pandemic levels. The recovery of the Asian market is less established and therefore carries more risk. The strengthening of Sterling against key currencies for inbound tourism presents a risk to the delivery of inbound tourism. The risk associated with the GBP:EUR exchange rate is twofold, as well as dampening demand for inbound tourism it makes overseas holidays more affordable for a domestic market. This, coupled with the inflationary economic pressures, presents a risk to the supply of domestic tourists in 2025; specifically that those who can afford to, may chose to holiday abroad and those remaining in the UK may not be able to afford leisure spending at the same level.

The Plan assumes that there will be no new adverse impact caused by security, economic or environmental events, but it should be noted that terrorism continues to pose a risk. Potential further international uncertainty driven by geopolitical incidents also casts a shadow over the future years. Any impact on the USA market will have an adverse impact on the Roman Baths as this is our largest overseas market.

It should be noted that the surplus for 25/26 of £14.139m is at the upper end of estimates. As it is unclear whether the slowdown in visitor numbers in 24/25 is permanent or temporary, the Service will plan for visitor numbers of 1,100,000 in 25/26 (9% growth) reflecting previous projections and the capacity of the Roman Baths site. However, to achieve this, the Service will need to see growth in the inbound market from international tourists which is dependent on factors outside of the Service's control. Heritage Services' net income is a key factor in the Council's Budget. The risks outlined on visitor numbers and consequently on income have been factored into the Council's 2025/26 budget setting process, with regards to both its budgeted contingencies and adequacy of its reserves. Actual visitor numbers in 25/26 will be used to rebase the future projections for the Service at a level which reflects

the updated emerging picture, and in turn will be reflected in the Council's budget planning for future years.

There are inherent risks to Fashion Museum Bath. At this stage the risks associated with this project are commensurate with a project of this scale and ambition and no more than this. Strict project governance and a quantified risk register will manage risk.

Progress has been made on the pathway to net zero with an experienced consultant team to advise. These interventions form part of the RIBA II cost plan and are within budget.

Appendix 1: Financial Summary

Heritage Services Business Plan 2025-30

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Business Plan Summary

	Prior Year Actuals		Current Year (2024/25)		2025/26 Finan	Plan Years			
	2022/23 £'000	2023/24 £'000	Budget £'000	Forecast £'000	Budget £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000
Admissions	(15,890)	(19,889)	(23,076)	(22,572)	(24,976)	(25,764)	(26,491)	(27,235)	(28,081)
Retail Sales	(2,303)	(2,717)	(2,795)	(2,795)	(3,106)	(3,161)	(3,165)	(3,168)	(3,172)
Room Hire	(966)	(656)	(682)	(632)	(647)	(672)	(684)	(683)	(691)
Catering	(479)	(427)	(416)	(416)	(503)	(511)	(526)	(542)	(558)
Other Income	(999)	(863)	(528)	(828)	(922)	(957)	(957)	(970)	(971)
Grants/Contributions	(99)	(97)	(12)	(12)	(12)	(12)	(12)	(12)	(12)
Total Income	(20,737)	(24,649)	(27,509)	(27,255)	(30,167)	(31,077)	(31,835)	(32,610)	(33,485)
Employee Costs	5,370	6,243	7,100	6,995	7,663	8,015	8,332	8,663	9,006
Premises Costs	1,574	1,696	1,700	1,547	1,609	1,660	1,751	1,849	1,952
Transport Costs	39	41	36	36	39	40	41	42	43
Supplies & Services	5,252	3,269	3,672	3,635	3,884	4,133	4,257	4,272	4,255
Maintenance	634	355	569	544	622	627	629	643	651
Investment	700	416	586	561	560	600	570	590	610
Total Expenditure	13,569	12,020	13,664	13,319	14,378	15,076	15,580	16,059	16,519
Internal Income	(3,279)	0	0	0	0	0	0	0	0
Recharge codes	4,741	1,511	1,597	1,597	1,589	1,780	1,780	2,077	2,492
Internal Recharges	1,461	1,511	1,597	1,597	1,589	1,780	1,780	2,077	2,492
Contribution to Reserves	6	6	6	6	6	6	6	6	6
(Surplus) / Deficit	(5,700)	(11,112)	(12,242)	(12,333)	(14,193)	(14,215)	(14,468)	(14,468)	(14,468)
Operating Margin	27.5%	45.1%	44.5%	45.2%	47.0%	45.7%	45.4%	44.4%	43.2%
Operating Margin (pre investment)	30.9%	46.8%	46.6%	47.3%	48.9%	47.7%	47.2%	46.2%	45.0%
Wage %	25.9%	25.3%	25.8%	25.7%	25.4%	25.8%	26.2%	26.6%	26.9%

Appendix 2: KPI Targets

	2023/24 (actual)	2024/24 (forecast)	2025/26 (proposed)	2026/27 (proposed)	2027/28 (proposed)	2028/29 (proposed)	2029/30 (proposed)
Roman Baths visitors (000s)	1,001	1,008	1,100	1,111	1,128	1,145	1,162
Victoria Art Gallery visitors (000s)	63	51	84	86	88	90	92
World Heritage Centre visitors (000s)	113	100	104	120	124	127	130
Roman Baths income per visitor (£)*	22.77	25.32	25.79	26.30	26.56	26.83	27.17
Education visitors at Roman Baths	16,772	15,200	16,500	16,750	17,000	17,250	17,500
Discovery Cards Issued (000s)	16,467	12,000	5000	5,500	6000	26,000**	17,000**
Social media followers	129,923	194,077	212,191	237,443	262,939	291,678	324,259
Discovery Card holder visits (000s)	17,650	19,000	19,000	19,250	19,500	19,750	20,000
Net profit per Council Tax household (£)	131.02	145.42	167.30	167.59	170.57	170.57	170.57
* admission income plus retail sales & other sales and restaurant commission							
** Discovery Cards have a 5 year renewal lifecycle meaning those issues in 22/23 will begin to expire in 27/28							

Appendix 3: Carbon reduction targets

Goal 1: Decarbonise Heritage Operations

KPI:

- Total Scope 1 & 2 Emissions halved

Targets:

	Progress to Date	On track
Reduce gas consumption by 65% compared to baseline year (2019)	53%	
Reduce electricity consumption by 61% compared to baseline year (2019)	57%	

Goal 2: Empower and educate our visitors, employees and suppliers

KPI:

- Improved Scope 3 Data accuracy, less spend-based data
- Supplier engagement through workshops and surveys

Targets:

	Progress to date	On track
Retail suppliers covering 30% of spend to have a net zero target in place	60% of spend engaged with	
[?] number of Retail products to be rated Green / Amber	In progress	
Suppliers covering 30% of PG&S spend to have net zero target in place	20% of spend engaged with	
All sites zero waste to landfill	New supplier sourced	
Bi-annual refresh of employee commuting & WFH data		

Goal 3: Lead by Example KPI:

- Obtain external accreditation for Sustainability
- Create meaningful partnerships
- Engage with visitors & employees on Sustainability issues

Targets:

	Progress to date	On track
Obtain 3 external accreditations / recognitions for sustainability	Compiling evidence	
Set up at least one travel related discount perk for visitors	Discussions beginning	

Improve sustainability score in mystery visitor benchmarking		
70% of FT / permanent employees to be certified carbon literate	Becoming a certified trainer	

Progress in reaching Net Zero emissions (Scope 1 & 2)

The target numbers set are based on projects that are in progress, and are also informally aligned with the Science-Based Targets Initiative meaning that the reduction targets are consistent with limiting global temperature rises to 1.5 C

Decrease since baseline year (Actual Figures)	Baseline year	Most recent year		2027 Target Figures – est CO2*	2027 % Reduction Targets
	2019/20	2023/24	% decrease vs 2019	2027/28	% decrease vs 2019
Gas tCO2e	239.0	112.2	53%	83.66	65%
Electricity tCO2e	293.0	102.6	65%*	92.8	68%
Total Scope 1 & 2	532.07	214.8	60%	176.5	67%

** % decrease in emissions won't align to consumption due to changing emission factors. When a constant is applied, the % reduction matches the consumption*

2027 Consumption Targets	Estimated tCO2e	kWh (target number)	Progress to date (23/24)
65% less 2019 Gas (kWh)	83.24	455,059.21	53%
61% less 2019 Elec (kWh)	92.80	448,287	57%

Annual Emissions Tracking

Emission Scope	2019/20	2022/23	2023/24
Scope 1	279.8	211.9	112.6
Scope 2	293.0	195.9	102.6
Scope 3	2,339.5	2,248.5	2,222.0
Total (tCO2e)	2,912.3	2,656.2	2,437.2
kgCO2e / Visitor	2.5	3.2	2.4
tCO2e / FTE	18.7	17.7	16.6
Visitor Travel (tCO2e)	44,559.6	71,331.4	97,915.0

Appendix 4: 2024/25 Business Environment

- Lower inbound visitation to the UK than anticipated, since August.
 - The strengthening of GBP against both the EUR and USD make the UK comparatively more expensive than 12 months ago.
 - Increased geo-political instability also reduces confidence to travel.
 - This has resulted in a fall in the volume of group visitors to the Roman Baths.
- Domestic audiences, who could afford to, have opted for more overseas holidays driven by poor weather across 2023 and 2024
- Cost of living has meant that many domestic visitors are choosing to take fewer days out and prioritising free visitor attractions.
- The sites that have seen growth this year have programmed to add to their normal offer. This is difficult at the Roman Baths due to space constraints.
- Across the Association of Leading Visitor Attractions (ALVA) cohort May-September has seen an average 6% fall in 2023 visitation levels. Many ALVA sites are expecting to deliver visitor numbers in line with last year's actuals.
- Access to Bath has been impacted by infrastructure works at key trading periods
 - A36 closure for 4 months (impacting the route many tour coaches take from Stonehenge)
 - Bristol to Bath major road and rail disruption during half-term making it very challenging for travel from one of our key domestic destinations.
- Weather during Q3 was very unsettled, with two major storms (Bert and Darragh) impacting weekend trading. Unsettled weather is expected, but falling on weekends has a disproportionate impact on income generation.