

Ancestral Audit 2013

Background

VisitScotland's 2013 research on the ancestral tourism sector provides an estimate of the current volume and value of ancestral visitors to Scotland. It also helps scope the future market opportunities. It finds that there is a market potential of £2.4bn to Scotland over the short to medium term, plus the following intelligence - summarised:

- current annual estimated trips is 213,000 and "...a potential market of circa 4.3 million people who could be encouraged to visit in the short to medium term i.e. next c. 5 years";
- current estimated value is £101 million – "...in value terms converting this potential market could be worth around £2.4bn to Scotland in the short to medium term (i.e. over the next c. 5 years)".
- "...likelihood to return to Scotland (for genealogy/tracing ancestors) and likelihood to recommend Scotland to family and friends is high across all countries". (USA 78%, Canada 85%).

However:

- Ancestral tourism (AT) does not necessarily correlate with existing high-profile Scottish events (June and September are the most popular months for ancestral tourism);
- the Ancestral Tourism Sector in each locality is not necessarily "joined-up", and even where it is, there is no overall agreement, per region, as to what the AT Sector consists of;
- to determine the AT sectoral provision locally is not as straightforward as asking (say) the Local Authority or local VisitScotland office, as each of them has a different and partial view of what constitutes the AT sector locally;
- there is a perceived tendency, especially within public sector bodies (local and national) to deal with each component (e.g., Accommodation, Visitor Attractions, Events) in a separate silo, and in the process to ignore many of the local actors who do not fit a pre-determined pattern and a fixed location (such as the Ancestral Welcome Scheme, which fits B&Bs but not, say, Genealogy Researchers);
- the same could be said for DMOs and VisitScotland Regional Directors, who have not so far been given any reason to focus on the AT area as a priority;
- VisitScotland staff on the ground have limited information or collateral on which to give visitors the appropriate advice on AT.

Hence, there is a need to establish the breadth, depth and integration of the AT 'product' which currently exists in Scotland.

The resulting report will be used as a content asset and will form the basis for listings, information sheets, website entries, Tourism Intelligence Scotland materials, VS-led training/info sessions etc. to be used by VisitScotland and its partners.

Research Aim & Objectives

- **SCOPE:** To conduct an audit of the AT product currently available in Scotland, identifying and highlighting strengths, weaknesses and gaps;
- **PATTERNS:** The audit will be carried out and the results presented generally according to VisitScotland areas (see below) plus National;
- **OUTPUTS:** Alongside the above, it is hoped that case studies of 'best practice' will emerge, showing the ways in which certain suppliers or local consortia successfully deal with the ancestral visitor and display partnership – it should be understood that these may not be 'businesses' in the traditional sense (they could be sole-trader working genealogists, volunteer-led Family History Societies, local Registrars etc.) and may be local businesses who do not necessarily consider themselves in the AT business (e.g. accommodation providers, antiquarian bookshops, map-sellers);
- **ONGOING:** The overall results and these case studies will be especially useful in a series of workshops planned with Scottish ancestral businesses in 2013, and will inform the ancestralscotland.com website, media packs, information for travel specialists and so on.

Methodology

The approach differs from standard 'sampling' as it had to be comprehensive. The process involved:

- Desk research based on existing knowledge;
- Pre-arranged visits with groups of local actors, for discussion and in-depth interviews;
- National and supra-regional organisations were contacted and asked for local details (National Trust for Scotland, Historic Scotland, Association of Leading Visitor Attractions etc.);
- Telephone and email contact.

Deliverables

- The report details the research findings in a summarised 'digest' form, but with as much accessory information, material, observations and insights as possible. These are a mixture of on-the-record and off-the-record;
- Additional suggestions and findings (gaps, opportunities, feedback etc.) are included;
- Six short Case Studies are presented in context;
- A database of Local Assets has been produced (as a simple spreadsheet suitable for further development)

Scope

Scotland was considered as 16 'regions' (plus National) for this purpose.

1. National resources	9. Dundee & Angus
2. Edinburgh & Lothians	10. Aberdeen City and Shire
3. Scottish Borders	11. Highlands
4. Dumfries & Galloway	12. Perthshire
5. Greater Glasgow & The Clyde Valley	13. Loch Lomond, Trossachs & Forth Valley
6. Ayrshire & Arran	14. Kingdom of Fife
7. Argyll & Isles	15. Orkney
8. Outer Hebrides	16. Shetland

No of Assets (by type) collated as a result of the audit (Scotland-wide)

Local Studies / Family Studies Libraries - 61	Family History Societies - 60
Archives & Heritage Centres - 57	LDS Family History Centres - 17
Burials - 61	Genealogists - 46
Museums & Heritage Centres - 137	Castles & Historic Houses - 350
Regimental Museums - 20	Clan & Family Chiefs - 157

Observations and Suggestions

Local Authorities

Hardly any LA has someone specifically dedicated to Ancestral Tourism, or explicitly makes it an aspect of the job of one person/unit. In many cases, responsibility for tourism overall is divided between a number of persons or units (Economic Development, Heritage/Culture, Chief Executive's Office, Communications) with little overall coordination.

The offer of "Ancestral Tourism Summits" – involving many public and private bodies across the LA region, and individual providers – would be welcomed, with the following recommendations:

- Make events less generic and more AT-focused
- Create more AT content in toolkits and handbooks
- Give more advice on integrating with overseas visitors
- Local forums and groups to pull everyone together
- Greater availability of funding for local AT groups

Some areas are promoting new and specific events (Celebration of the Centuries, Historic Scotland), some have understood the rationale of associating with Homecoming 2014 Signature events and even promoting themselves as satellite destinations and accommodation centres (Dunfermline2014) while others have branded and expanded existing events (StAnza Poetry Festival).

VisitScotland Information Centres

There is a need to differentiate the Ancestral Tourism Welcome Scheme from the “Accommodation” product, and market it strongly to the non-accommodation sector. What follows is in no sense a scientific survey, but a series of impressions built up from many discussions, emails etc.

There is a wide perception that the Welcome Scheme is for accommodation providers only. Public sector bodies (Archives, Libraries etc.) had never considered joining and could see no benefit.

Non-geographical providers (genealogists, national bodies, tour operators) feel shoe-horned into a region when in fact they should appear in all. The existence of a “national” category wouldn’t help, as people often look in a particular region. But (say) a tour operator based in Angus could organise tours in (say) Shetland or Galloway and would want to be listed in all areas.

Suggestions:

- Make available a simple A5 printed leaflet of AT resources – national one side, local the other (which should also be distributed to accommodation providers, visitor attractions etc.).
- Have available both a webpage and a printed leaflet of Top Tips for Family Researchers.
- Provide specific training for VS Regional Managers and Visitor Services Managers, to be cascaded by them to their staff members.
- Help Tourism Intelligence Scotland rewrite the Rewrite Ancestral Tourism Factsheet, now out of date (21 July 2010), but not under way.
- Encourage local businesses to think of VS and the VIC as a resource-gatekeeper

Tourism Summits

There is an appetite for a major planned programme of “Tourism Summits” held locally involving VS/ES, SE, one specialist in Family & Local History, one specialist in Ancestral Tourism (these two acting as facilitators). At the very least the attendees should be:

- the relevant Local Authority officers
- separately from these, a local representative from:
 - Archives
 - Libraries
 - Registrars
- VisitScotland Regional Directors and Visitor Services Managers
- Local Groups and Societies (Family History, Civic Society, Local Heritage)
- Accommodation providers
- Destination Management Organisations
- Chamber of Commerce
- Federation of Small Businesses

AncestralScotland.com

Some of these ideas are already in discussion, or may be overtaken by others:

- On each Region page, have a list similar to (but wider than) than the one at www.ancestralscotland.com/explore/regions-counties/aberdeen-city-and-shire/
- Include local genealogists, local AT Visitor Attractions etc.
- Encourage each region to collaborate in producing something like Routes to your North East Roots (Routes to your North East Roots: A guide to researching family history in Aberdeen City and Shire)
- Ensure that local tourism websites also have a specific tab for Ancestry/Family History
- Likewise, the See-Do pages in VisitScotland.com (e.g.) www.visitscotland.com/destinations-maps/kingdom-fife/see-do/ should have an Ancestral or Family History section or tag leading to locally-relevant resources.
- Also, in www.visitscotland.com a search for “genealogist” comes up with only 3 results, when many more are registered with VS and/or members of the Ancestral Welcome Scheme.

Family History Societies

All FHSs should be sent the Tourism Intelligence Scotland guide to AT, with a suggestion that they make their contact details more explicit, and insert themselves into local AT groups, forums and activities (recognising that many already do). It helps if they have established premises (Glasgow, Dumfries & Galloway, Aberdeen & NE Scotland) or a good relationship with the LA (Perth, Inverness).

Destination Management Organisations

- Contact all DMOs to ask about their AT strategy, and offer specific help in designing and implementing one.
- This should go beyond straightforward marketing advice and could be the basis of a locally-driven Tourism Summit.
- It is important to bring in the Scottish Destination companies, while realising that they and any particular DMO may have a different agenda.

Next Steps

- 16 regional factsheets detailing ancestral products
- Incorporate new regional products data into VisitScotland’s ancestral website.
- VIC staff training on regional ancestral products.

