FINAL REPORT: EXECUTIVE SUMMARY

Ancestral and Literary Tourism in the East Midlands

16 December 2008

Cultural Consulting Network and Seabridge Consultants
Executive Summary

1. Introduction
This report forms the first stage of a project to research the potential for developing Ancestral and Literary Tourism offers in the East Midlands based on the collections and interests of the region’s museums, archives, libraries, historic properties and heritage sites.

Ancestral tourism and literary tourism are two distinctive niche genres of cultural tourism that span the interface between the tourism industry and the cultural sector. As such they both offer opportunities and challenges for the organizations and businesses seeking to develop and market products and services to a very sophisticated group of consumers. Based on existing information and new research, this report seeks to assess the potential for the different heritage and tourism bodies within the East Midlands to develop and grow these markets, and to outline the steps necessary for establishing such initiatives, which are by their nature, long-term commitments.

In developing this report and recommendations, research has included:

- a review of the current levels of activity in relation to family history at the local authority archives and main literary holdings in the East Midlands including MACE & Northamptonshire Black History Association
- a review of current tourism and marketing activity within the East Midlands, and relevant strands or initiatives of national campaigns eg. Visit Britain ‘Begin the adventure’
- a review of tourist market information including profiles, numbers etc
- a review of current analysis and evaluation of literary tourism initiatives
- a review of the relevant collections, user profiles and current family history activity across a sample of museums in the East Midlands
- telephone interviews with related heritage and tourism organisations for both comparator knowledge, and specific regional information
- an audit of existing information held by partners, and related heritage/tourism bodies, to assess the potential market for any ancestral and tourism offers
- a review of comparator projects similar to potential development options to learn lessons and ensure proposals are likely to be delivered effectively. In considering whether a development ‘model’ could be transferred to the East Midlands, the review analyses the main success factors and characteristics central to their success.

2. Definitions

**Ancestral tourism** is defined here as travel and tourism related activity motivated (at least in part) by an individual’s sense of ancestral connection with a particular locality. In the strictest sense a ‘tourist’ is usually defined as someone away from their usual place of residence overnight, but for the purposes of this study we have adopted a broader, more inclusive definition that includes day visitors as well as the more economically significant overnight visitors.

Put most simply, **literary tourism** is the process of visiting places and sites associated with writers and their writings. In practice, most literary tourism does not distinguish between the physical traces of a writers life and the landscapes, settlements and buildings that are brought to life (whether real or imaginary) in their works. Academics would argue that the vast majority of tourists to the UK are literary tourists in the sense that their motivation for coming is often linked to images and pictures conveyed through the reading of books.
3. Overview of the East Midlands

From an Ancestral Perspective
The East Midlands is an administrative concept and not one which resonates with peoples’ picture of where they and their forebears have come from. The region is not alone in this, the South East is another example, but it is a factor that needs to be recognised in developing any initiatives aimed at an ancestral tourism market. The fact that some parts of the UK, like Scotland and the North East have a stronger projected shared identity is valuable in marketing terms. Within the East Midlands, people are much more likely to see an affinity with their county than the region as a whole, as the five counties have not historically developed as a heterogenous group. Those we have interviewed for this study generally feel, and feelings are important in this arena, that there is some sense of ‘sharedness’ between Derbyshire, Leicestershire and Nottinghamshire because of a common thread in their post industrial revolution development. In contrast, Northamptonshire’s past is much more tied to the South East and its striking distance to London, while Lincolnshire is geographically more isolated and parts looks to the North - in fact, parts of it are even administratively in the Humber. Another feature of the East Midlands is the fact that it seems to have been subjected to less historic migration than some other parts of the UK. Many historic villages and market towns remain and even the urban centres are not large compared with other region’s conurbations. Clearly, this could have an effect on the potential international ancestral tourism market.

From a Literary Perspective
Nowhere in the East Midlands is going to make it into the top ten destinations in the UK for literary tourism with the kind of pull of London, Stratford or Edinburgh. In fact the only author of East Midlands extraction mentioned in Visit Britain’s profiles of the UK’s ‘world famous’, featured on its website, is Tennyson. That said, the region does have a proud literary heritage, the highlights of which are:

- The Lincolnshire Wolds served as Alfred, later Lord, Tennyson’s birthplace and home into adulthood
- DH Lawrence was born and brought up in Eastwood, near Nottingham and lived in the area until 1912 when he was 32
- John Clare, 19th century poet who was in his own time known as ‘Northamptonshire’s Peasant Poet’
- Lord Byron – who ancestral home is Newstead Abbey in Nottinghamshire, although he only lived there on and off as a young man between 1809 and 1814
- Joe Orton, Sue Townsend and Philip Larkin associations with Leicester. Joe Orton and Sue Townsend were brought up on the same estate.
- John Dryden, 17th century poet who was born and raised in Oundle and Titchmarsh, Northamptonshire

In literary tourism terms, a strength of the East Midlands is that its most famous authors evoked portraits, images and pictures of the real places they inhabited in their works, that these buildings and landscape remain, and a clear connection can be made between the two. For example, no less than four of DH Lawrence’s family homes can be identified in Eastwood.

Role of archives, museums, libraries and other heritage providers
The report analyses the different, but complimentary role of archives, museums, libraries and other heritage providers in supporting genealogical research and literary tourism and looks at these characteristics might shape any future work to develop an Ancestral or Literary Tourism offer.

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1 North Lincolnshire and North East Lincolnshire
Based on primary research amongst a sample of archives, local studies libraries and museums, it also presents outline finding on current levels of activity and interest, using the results to shape the conclusions about how this work might be developed and supported in the future. Basic research into family history societies was also conducted, to identify broad activity areas and draw out potential comparisons with the role of family history societies in Scotland who routinely support Ancestral Tourism enquirers.

**Role of tourism agencies and tourism providers**

Further research was undertaken to define the potential role of the different tourism organisations within the East Midlands in supporting this kind of work, most notably the Destination Management Partnerships who focus on industry engagement, quality, tourism growth and the use of the web and customer relationship management as marketing tools. An analysis of visitor information (by county) was also conducted to see what could be deduced about ancestral and literary tourism activity from current standard industry statistics and information.

### 4. A Market for Ancestral Tourism? - General Conclusions

The general conclusion that can be reached is that while heritage & history are an important part of the appeal of all parts of the East Midlands region, at the macro level ancestral tourism related promotion is not visible, and there is a relative dearth of statistical information on which to base decisions and justify investment of resources.

There are indications of ancestral potential from, for example, the anecdotal evidence from a visit to a Leicester TIC, from discussions with museums, libraries and archives and the fact that 2% of visitors to Lincoln said they went to the archives. It is perhaps a reasonable assumption that the majority of these visitors would have visited the archives in order to do ancestral research of some kind.

Our research has not focused on individual businesses. Activity will, however, be taking place at the ‘micro’ level within organisations and businesses, often because of the personal interest of an employee, volunteer or owner. For example the report looks at activity within the National Trust and the effectiveness of leadership from individuals with knowledge and enthusiasm.

### 5. A Market for Literary Tourism? - General Conclusions

Literary tourism promotion by the tourism agencies is small scale, patchy and only really visible where linked to films. There is a complete lack of real market research to judge potential and what evaluation does exist, for example Lincolnshire Tourism’s for the recent Pride and Prejudice campaign, are restricted to return on investment figures, rather than a wider assessment of product development, potential and understanding of the market. This problem is exacerbated by the fact that literary tourism is mainly controlled by private tour operators and their market assessment obviously remains commercially sensitive.

Visit Britain has conducted consumer research over a number of years that has highlighted literature and literary locations as a strong interest. These consumers tend to fall into the category of tourists over which marketing effort has less impact in terms of changing their holiday and activity choices, which may have influenced the lack of product development by the tourist boards and DMPs.

### 6. Ingredients for Success – Lessons Learnt from Comparator Projects

In order to learn from experience elsewhere six comparator projects were examined: five in Scotland and one in Wales. The Scottish bias in the comparator studies reflects the head start that
Scotland has had in the development of ancestral tourism, as well as the consultant team’s intimate knowledge of the Scottish context.

In this section of the report we summarise the projects and draw out the principal lessons to be learned. Appendix 1 of the main report contains detailed descriptions of the comparator projects.

The general ‘headline’ themes emerging from the lessons learned from the comparator projects are:

- The benefits – and difficulties – of collaborative working
- Effective collaboration requires clear aims and objectives and adequate resources, including development support
- The central position of the Web as a communication mechanism
- Whatever is done needs to have the needs of ancestral tourist customers at its heart.

7. Conclusions, Recommendations and Proposed Programmes of Activity

7.1 Overall Conclusions

From the research phase of this project we came to the following conclusions about the current nature and character of ancestral and literary tourism in the East Midlands:

- **Family History not Ancestral Tourism.** There is, as yet, no kind of concentration of effort on ancestral tourists as opposed to general services for the family historian. We found no evidence of product development for ancestral tourists.

- **Understanding needs of Ancestral and Literary Tourists.** The distinct needs of ancestral and literary tourists, in terms of a personal package, are not being met. There is a lack of coordinated market research and what anecdotal understanding does exist is not well shared the heritage sector and the tourism agencies and providers.

- **Corporate Objectives.** Developing ancestral and literary tourism is not the core objective of any of the archives, libraries and museums in the East Midlands, the majority of which are focussed on serving the needs of local audiences. Likewise tourism agencies have clear objectives to support domestic and inbound markets but have little room to develop new avenues of product development.

- **Relationships with Tourism Agencies and trade operators.** There is virtually no real sustained interaction between archives, libraries and museums and the tourism agencies and private operators even in terms of general promotion.

- **Communication and Information Exchange.** There is no forum for basic information exchange between the heritage providers about resources they each offer and, in turn, with the tourism agencies and providers.

- **Collections.** ‘Market readiness’ of collections is an important factor that is limiting ancestral and literary tourism. The records of archive services, libraries and museums need to be catalogued so that they can offer up the information they hold to researchers and be interpreted for the public. Cataloguing backlogs are common. There is sometimes not a handy correlation between well-catalogued relevant collections and public access to the sites that they illustrate.
Providing the right kind of experience. Ancestral tourists are looking for a certain kind of warm welcome, traditional reception, enthusiasm and knowledge from the people they encounter on their very personal journey. Empathy as well as information is needed. This is where some of the natural skills and interests of people that work in the heritage sectors, many of whom are local volunteers in small rural museums, can play a role. They have a great love of their local area and pride in communicating its history and can have a unique way of explaining a sense of place and generating a feeling of belonging.

Readiness to Respond. The current role played by the heritage sector in helping ancestral and literary tourists is not well understood or appreciated and their value in wider programmes is often not fully acknowledged and one of the challenges associated with growing ancestral and literary tourism is in defining the support and capacity, and funding, required to enable them to respond appropriately.

7.2 Ancestral Tourism Conclusions

Ancestral tourism in the East Midlands can best be described as taking place under the radar at present. There is evidence of activity but precise quantification of current activity levels is problematic, making estimation of likely growth difficult.

Accepted at face value, the 2% of Lincoln’s visitor market that visits the Lincoln Archive would suggest that 2% of Lincolnshire’s visitor economy of £927 million was attributable to ancestral tourism – a value of £18.5 million.

Alternatively, using the percentage of visitors to the National Trust’s Belton House who described themselves as ‘specialists’ in genealogy/family history (15 of 244, or 6%) the value of ancestral tourism in Lincolnshire is £55.6 million.

Our conclusions are that the project board ought to proceed with a programme of activity whose purpose will be to overcome some of the limitations outlined above, namely, to:

- Act as catalysts for collaborative action at a local level, bringing together partners from archives, museums, libraries, family history societies, tourism businesses and tourism agencies (among others) to explore ancestral tourism opportunities together;
- Raise industry awareness of ancestral tourism opportunities and place ancestral tourism ‘above the radar’ of perception and systematic data capture;
- Provide exemplar projects to inspire others;
- Enable action research to be undertaken in order to incrementally build the case for ongoing investment in ancestral tourism – development of ancestral tourism itself being best done in an incremental fashion
- Act as means by which some of the softer elements of sustainable partnership – good communication, appreciation, mutual understanding and trust - which are lacking at the moment can be generated;

7.3 Ancestral Tourism Recommendations

Any development of ancestral tourism in the East Midlands should learn the lessons of practical experience of delivering such networks in Scotland and elsewhere. We believe there are two necessary prerequisites to establishing any activity in the East Midlands– leadership and capacity.

7.3.1. Leadership – Steering Group or Project Board

The networks could only be established with any chance of success if core support was available from one of the Steering Group partners. It is our recommendation that a steering group, with a
lead partner, with agreed terms of reference and resources, clear responsibilities and committed individuals is a requirement before further work can proceed on a sound footing. We are aware that this at present is uncertain, given that the role and capacity of MLA East Midlands, the commissioning body for this research and development phase, will be different from March 2009.

**Recommendation One:** We strongly recommend that, once this study is complete, the present Steering Group review and analyse the commitment of their organisations to development of ancestral tourism. Without clear overall direction and leadership we do not believe the ancestral networks can work and, sadly, we would recommend that no further action on development should take place, as we consider it would be doomed to fail and raise expectations amongst potential partners that cannot be met.

7.3.2. Capacity - Ancestral Tourism Development Coordinator

We recommend that some form of overarching capacity and support is acquired to drive forward the overall direction and objectives of the steering group and to coordinate and support the action plans of the proposed ancestral tourism networks. It was clear to us from our discussions with tourism agencies and staff in archives, museums, libraries and the wider heritage field that there was a good deal of goodwill and ideas for joint working across their organisational boundaries but no additional capacity internally to make such aspirations a reality. Neither did there seem to be sufficient focus from specific individuals to make something happen without an additional coordinating role. Experience from Scotland, where networks have been established with and without extra capacity, suggest that those with extra capacity are much more likely to deliver the outputs of their action plans and succeed.

**Recommendation Two:** The establishment of a development post to coordinate the development of ancestral tourism in the East Midlands. The post holder would be responsible to the overall steering group and would be expected to manage a coherent programme of activity in order to maximise impact and the value of the work, and to start to build longer-term relationships. The Development Coordinator will help to establish the proposed ancestral networks, be responsible for development and delivery of their action plans, as well as communication and coordination between the individual networks so they can best learn from each other, and acting as a advocate for what the networks are seeking to achieve in other arenas.

In developing this option, we envisage that the post would be for a minimum of two years, and would be funded by resources from the present steering group members. To this end, we have already negotiated with MLA East Midlands for a significant contribution towards this post (and other actions) to be included with the funding applications to the Renaissance business plan for the coming years.

7.4 Ancestral Tourism Proposed Programme of Activity

During the research phase of the project, we have tested our proposed programme of activity with a selection of those we have interviewed from archive, libraries, museums and heritage sites who were almost without exception enthusiastic and looking for building blocks to longer term relationships. We were, therefore, particularly mindful of not recommending actions which would be trying to run before they could walk. This is not to say that there are not a range of other ancestral themes initiatives which could be developed in the future.

The following programme of activity, are presented as a list of options, following discussion and agreement with the client in November 2008, will be developed with further detail by February 2009.
We are recommending an initial focus on ancestral tourism initiatives aimed at building understanding and capacity across the region in the longer term. These would focus on establishing 1) Ancestral tourism networks and 2) Guides for ancestral tourism.

7.4.1. Ancestral Tourism Networks

**Recommendation Three:** Establishment of three Ancestral Tourism Networks in Nottinghamshire, Northamptonshire and Lincolnshire.

Experience with the creation of similar ancestral tourism networks in Scotland is that they need to be local in focus (though not necessarily only local in membership), clear in their focus and properly supported. The local focus argues for them to be county-based rather than regional. In any case a regional focus is meaningless from an ancestral research point of view – records are held and referenced by county.

In order to provide comparative models we recommend three networks be created, in Lincolnshire, Northamptonshire and Nottinghamshire. We have selected these counties as we believe that Lincolnshire and Northamptonshire have histories and geography distinct from the other three counties but that Nottinghamshire, Leicestershire and Rutland, and Derbyshire have more in common, so of the latter 3 any could serve as a pilot.

Creating three networks means that if everything goes well there will be three successful networks to compare; if things go badly and one of the networks fails there will still be two to provide each other with mutual support. Each network will be asked to draw up and implement an action plan that is achievable within a realistic timeframe and within the resources available. The catalyst for the action plan will be a development/awareness workshop facilitated by the project consultants. The action plan must include evaluation and dissemination. It is strongly recommended that each network comprise a minimum of seven members and a maximum of twelve. Suggested membership includes: Tourism agency, TIC, Tourism businesses (2), Archive, Local studies library, Family history society, National Trust, Museum, Other attraction, Arts/culture agency or business, Professional researcher or registrar.

We envisage that these networks will have membership that reflects the heritage strengths of each county, for example representation from stately homes and estates will be important for Northamptonshire.

7.4.2. Guides for Ancestral Tourism and potential product development

**Recommendation Four:** Collaborative development of Ancestral Tourism Guides

Each local network will have its own ideas about its action plan, but it is highly likely that the production of a local guide to ancestral tourism resources and opportunities will feature in the plans. Our recommendation is that an expectation be placed on the local networks that such a guide will be produced, though the group will be free to decide the nature and scope of the guide it produces, in light of existing guides produced by the record offices and sources such as 'Finding Your East Midlands Ancestors' by Pam Fisher and various museums and local studies libraries.

Experience in Scotland is that such guides are very useful for ancestral tourists – indeed may in themselves act as a catalyst for an ancestral journey – and are also beneficial to local businesses and organisations. The process of drawing up the guide will encourage local networking and information sharing, often in the form of familiarisation visits, and can act as the trigger for commercial relationships between network members: for example, the development of accommodation and ancestral research ‘packages’.

If undertaken by the local networks then the partners involved in each project will be set already, though there would be nothing to stop a local network from widening the organisations or businesses with which it engages. The DMPs are very important partners here as their web sites...
offer a communication channel with potential users of the guides, but individual local networks or the three networks collectively might wish to share resources and create an online presence of their own that everyone involved could link to (and from) and which could be developed more comprehensively dependent on the success of the pilots. Although this could develop collaboratively into a form of East Midlands Ancestral Tourism Portal, in terms of content creation, we would be mindful of the importance of presenting the content by county to the public.

One benefit of such a portal is that it provides a dedicated communication channel with ancestral tourists enabling activity levels to be measured and additional research to be undertaken.

To help with the development of the guides and web based promotion, we will conduct further research and produce a general information leaflet to a standard template which each county network can use as a basis for detailing the main ancestral tourism information resources and produce a list of target organisations to hold information.

We will also explore the potential for making any information leaflets available on the web via key local organisations (eg. Record offices, tourism pages) and creating a dedicated marketing presence on the tourism pages.

7.4.3. Information briefings

Recommendation Five: Project information seminar
General information seminar and briefings on the results of the ancestral tourism research to raise awareness within the mla, tourism and historic properties sectors of ancestral tourism characteristics and opportunities, and to act as a catalyst for partnership-based approaches to the incremental exploration of ancestral tourism opportunities. The date for this information briefing is provisionally set for 23 February 2009.

7.4.4. Training

Recommendation Six: Tourism information and training on Ancestral Tourism
Ancestral Tourism information seminars/briefings for the East Midlands DMPs and TIC staff to brief them on Ancestral Tourism, how it works, market characteristics, comparators and opportunities for the East Midlands.

7.4.5. Data capture

Recommendation Seven: Standard Information Collection
Develop a simple briefing on ancestral tourism and guidance on data capture for TIC enquiries, archives, libraries and museums to start to collect consistent data on activity. Produce recommendations on the collation and coordination of data.

7.4.6. East Midlands Tourism Support information

Recommendation Eight: Development of Tourism information
Explore the interest of the EMT Quality Managers in supporting Ancestral Tourism within the East Midlands and scoping how it would fit within existing work programmes and priorities. In addition, explore the potential for producing a checklist for tourism businesses on ancestral tourism e.g. in the form of a Q book.

7.4.7. Volunteer development

Recommendation Nine: Scope potential for volunteer development
Given the strong, local interest in family history research demonstrated by the many local history museums there is a potential to harness this interest to develop ‘Ancestral Tourism’ champions
amongst the voluntary sector – drawing in people from local studies libraries, museums, historic houses, community archives and archive services. Volunteering opportunities and training, focussed on supporting family history research and ancestral tourism (or aspects of it such as cataloguing of specialist collections), could be developed and potentially supported by an external grant, for example through the Heritage Lottery Fund. At this stage, we envisage testing the potential of any volunteer development programme on a county basis, with a view to any programme of activity forming part of the action plan of one of the networks and therefore reflecting local priorities and circumstance.

7.5 Literary Tourism Conclusions

As stated under 9.1 above, many of the weaknesses of the current activity that could be relevant to promoting ancestral tourism applies to literary tourism too, although the understanding of the market is, in fact, weaker, and the product development stronger. At the moment literary tourism is happening in the East Midlands, and elsewhere, in a kind of vacuum. There are festivals, trails and tours, but there is no evidence of market assessment, impact or evaluation from which the heritage protagonists and the tourism agencies and operators can really learn from to make an informed judgement about what works and what to develop (if anything at all).

Currently most activity does not have a prescribed overall budget for activity and marketing and no additional capacity for project management appears to exist in the East Midland apart from the project officer, Angie Fordwich Gorely who is working for East Lindsey District Council in developing a series of trails, one of which is focussed on Tennyson.

7.6 Literary Tourism Recommendations

Some kind of starting point is needed as a basis for coordinated activity and sound product development. We believe that the programmes of events developed for Tennyson 2009 offers the best chance to make a start on understanding the needs of of literary tourists and the market in which they sit, through a programme of evaluation of already planned events and promotions.

7.7 Literary Tourism Proposed Programme of Activity

7.7.1 Evaluation of Tennyson 2009

There are currently no mechanisms in place monitoring or evaluating the impact of Tennyson 2009. The events and activities programme is pretty much developed, although there remains some budget and marketing issues to be resolved.

Recommendation Ten: We recommend that the evaluation is developed to assess the value of the process of developing and delivering Tennyson 2009 and the tourism impact of visitors.

At this stage we envisage that the evaluation proposals would cover both process and tourism impact.

8. Next Steps for Development of the Programme of Activity

We shall be taking forward the development of the programmes of activity over December 08 and January 09. We are mindful that we are not able to propose significant new product development at this stage and that where we are proposing some (the information guides) that these cannot be meaningfully developed until some of the building blocks such as briefings or networks are in place. Plans for the development of the recommendations will be taken forward in consultation with interested parties and finalised by February 2009.