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Research article

Irreconcilability of heritage missions: Personalized and general tourism audiences

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ABSTRACT

This paper explores the tensions between access to heritage as a social good, its commercialization and the subsequent impact this has on service delivery. Drawing on the context of ancestral tourism, a growing heritage tourism segment requiring a high level of personalization, it develops arguments about the structural irreconcilability implicit in contemporary museum service delivery when staff resources do not meet the individualized demands of specialist markets. Its findings reveal how challenges with delivering bespoke services drive tensions surrounding aspirations for greater public access and the commercialization of public heritage. Our focus contributes to debates around heritage missions and public heritage management, illuminating the importance of understanding provider perspectives as museums adapt to more visitor-centered service delivery modes.

Introduction

Public heritage policies aim to balance heritage missions alongside market-driven activities by widening access to generalized 'popular' audiences. This includes implementing technological enhancements to encourage engagement from these segments (Gombault et al., 2016; Panhale et al., 2022). Additional emerging visitor and revenue building opportunities focus on attracting more specialist 'niche' markets, often highly informed about specific items in museum collections or of the themes they signify. These could include specific historical periods, artistic movements or a wider relation to social history, the latter of which is our contextual focus.

The economic value of specialist markets for museums and their associated destinations is articulated in several studies (e.g. Cheng & Wan, 2012; French & Runyard, 2011; Page, 1993). Specifically, García-Muiña et al. (2019) address the potential of open-innovation in the museum sector indicating a need for more focused interfaces between expert staff and visitors, held back by resource-deficit. However, research on the effects of specialist visitor markets, which require focused staff-contact, as a catalyst driving current tensions in the museum sector remains scant.

Heritage typically falls under the stewardship and management of three sectors: public, private, and non-profit (Timothy, 2020). Whereas the principal goal of privately owned heritage attractions tends to be profit-related (Chang et al., 1996), the primary missions for managers of non-profit and publicly owned heritage center on conservation, custodianship, and education (Falk, 2016; Garrod & Fyall, 2000; Gilmore & Rentschler, 2002). Nevertheless, income generation is increasingly foregrounded

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in public sector institutional activity due to the high costs of heritage conservation, alongside cuts in public funding (Petr, 2015; Timothy, 2018). Fulfilling multiple policy objectives remains contentious for heritage managers, who often view public access, visitor experiences, and tourism as subordinate to their custodian role (Bryce et al., 2017; Wells et al., 2015). As a result, commodification of public heritage precipitates unease around commercialization, and promotion of it, for tourism purposes (Calver & Page, 2013; Farrelly et al., 2019). However, others argue that tourism offers financial means to ensure public heritage is preserved and accessible for both present and future generations (Szromek et al., 2021; Vareiro et al., 2021).

Provider perspectives of heritage tourism are increasing across multiple contexts and although scholars address some contestations surrounding the commercialization of heritage (e.g. Farrelly et al., 2019; Szromek et al., 2021), other authors emphasize the behavior of those perceived to have personal heritage connections as distinct from visitor groups with more general interests (Alexander et al., 2017; Bryce et al., 2017). This brings with it the potential for tension between broader access aspirations and drives towards accruing the benefits of commercial opportunity. While tensions have clear, broad implications for museum/heritage managers (see Poria et al., 2006), there is limited acknowledgement of the ways cultural heritage consumption, through specialist forms of tourism, manifests in the museum and public heritage sector. Specifically, little attention is paid to how visitors as 'consumers' intersect with heritage staff as 'custodians' of socially held goods and resulting challenges faced by service delivery staff.

Ancestral tourism is a growth market internationally with exemplar demand-side studies contextualized in diasporic visits to China (Huang & Chen, 2021), Poland (Mathijsen, 2019), Sweden (Mehtiyeva & Prince, 2020) and Ghana (Otoo et al., 2021). In Scotland, the national tourism organization, VisitScotland, identifies ancestral tourism as a key market (Alexander et al., 2017; VisitScotland, 2023) defining it as "a visit to Scotland partly or wholly motivated by the need to reconnect with your Scottish ancestors or roots" (Tourism Intelligence Scotland, 2013, p. 8). Existing research offers insight into delivery of this market in Scotland (e.g. Alexander et al., 2017; Bryce et al., 2017; Murdy et al., 2016), centered mainly on small, rural providers across the country. By exploring ancestral tourism within a public heritage organization in a major Scottish urban setting, we address the following research questions: What challenges are faced by staff when delivering specialized services within large public heritage organizations spread across various sites? How do challenges impact on the tensions surrounding public heritage missions?

Our setting is Glasgow Life, a large public heritage organization encompassing museums, galleries, and archive centers in Glasgow, Scotland. The city regards heritage tourism as a key sector within its current tourism development plan, with ambitions to attract more visitors and increase expenditure across both UK and international markets. Ancestral tourism is identified as a source of market growth in relation to these aspirations (Glasgow Life, 2017). Ancestral tourism offers a valuable lens into tourism service-promises made by heritage organizations and the reality of often under-resourced delivery and concomitant perceptions of service failure experienced by visitor groups (Camarero & Garrido, 2012). Our supply-side analysis reveals impacts across an organization responsible for both custodianship of heritage resources and their use as tourism resources in city destination marketing activity. Thus, we also contribute to work which has, hitherto, focused on consumer perspectives (e.g. Huang & Chen, 2021; Otoo et al., 2021).

We begin by addressing tensions evident in non-heritage and heritage management literature, continuing through exploration of increasingly individualistic demands of tourism markets and the challenges museums face when transitioning towards visitor-centered approaches. Our methodological approach is introduced, then findings presented addressing the research questions. We conclude by illustrating how our findings contribute to heritage management literature and the challenges facing public museums adapting to the needs of widening audiences and their intrinsic conservation role. We argue that the particular challenges associated with serving these markets, particularly when they have a specialist focus, drive structural tensions in museums. We contend that these are manifested where increasing commercial and social objectives clash with traditional curatorial roles, hinting strongly at the irreconcilability of heritage missions within museums. We also contribute to the literature on public heritage management by exploring delivery of a specific mode of personal heritage tourism, ancestral tourism, highlighting how challenges associated with serving niche tourist needs can be amplified within complex organizational settings.

Literature review

Funding public and cultural heritage services

Tensions between organizational missions calling for increased personalization, social value and the situated practice of delivery within a resource constraint context (both financial and staff related) are evident in various user and customer facing environments where 'public goods' are recognized (Barnes, 2011; Moore, 2000; Santos et al., 2021). These include health/social care and education, where top-down drives towards transparency and personalization are often undermined by actual resource scarcity at sites of service interface. Here, for example, the switch to automation can undermine citizens' experiences of these services when there is a reasonable expectation of personalized service delivery (Barnes, 2011; Bayne, 2014; Slasberg, 2013). Situating this historically and contextually, investing public funds to provide access to social, educational, cultural, and sports resources gained impetus from the 1970s in the industrialized world as part of government strategies to encourage economic growth, as well as providing facilities for visitors and residents, especially in post-industrial cities (Law, 2002; Park, 2010).

Governments recognized the social value that less top-down, didactic approaches offer intending to broaden access to culture and sport to improve physical and mental wellbeing, community engagement and foster a sense of belonging (Lak et al., 2020; Munro et al., 2006; Osborne et al., 2015). However, recent economic and political conditions force "public institutions to engage in various cost-cutting and fundraising ventures" (Aroles et al., 2022, p.347), with negative funding impacts on the cultural sector.

For museums, increased pressure to focus on performance measurements such as raising visitor numbers and improving experiences, alongside retail and catering facilities, can be viewed by employees as in opposition to fundamental curatorial missions (Alexander, 2018; Aroles et al., 2022; Farrelly et al., 2019).

Museums and managing public heritage

Accessibility and accountability are important considerations for public heritage managers, ensuring public institutions and attractions demonstrate value to the communities they serve (Aas et al., 2005; Burton & Scott, 2003; Goulding, 2000a). Managers are also accountable to funding bodies, with performance measures such as visitor numbers and diversity of audiences alongside drives to improve visitor experiences including both learning resources and facets designed to entertain (Davies, 2001; De Rojas & Camarero, 2008; Falk, 2016; Goulding, 2000b). To encourage wider access, some governments support free admission to public heritage resources, an approach encouraging community buy-in, increased donations, and sponsorship (Kotler & Kotler, 2000; Lak et al., 2020). However, public funding cuts mean “free” heritage attractions face pressure to generate income from ancillary activities and events (Calver & Page, 2013; Leask et al., 2013; Minkiewicz et al., 2014).

Studies highlight the emergence of pragmatic approaches where museums focus on innovation and technology to enhance visitor experiences in ways intended to inform *and* entertain, performing better economically and in terms of visitor satisfaction (Camarero et al., 2015; Camarero & Garrido, 2012). Innovation inevitably leads to an increased promotional orientation with museums often integrating marketing departments into their operations (Aroles et al., 2022). However, concerns have been highlighted such that commercialization and promotion of heritage, without sensitive deployment, threaten the professional integrity of interpretation (Aroles et al., 2022; Bryce et al., 2015; Falk, 2016).

Extant literature has long highlighted tensions around public heritage management and accompanying lack of consensus over heritage mission priorities in museums (Aas et al., 2005; Millar, 1989; Rentschler & Gilmore, 2002). Subsequent research illustrates this tension with preservation and curatorial duties viewed as superordinate to visitor services and accessibility (e.g. Farrelly et al., 2019; Wells et al., 2015). This custodial perspective, scholars argue, relates to concerns around commodification of public heritage as consumption ‘objects’ (Aroles et al., 2022; Lowenthal, 1998; Nuryanti, 1996) as opposed to traditional perspectives where museums serve as authorities on collections and a “quest for intellectual excellence and integrity” is paramount (Falk, 2016, p. 357). Other authors highlight commercial and tourism goals as running contrary to the intrinsic societal value of heritage where access-widening policies, like free admission, are favored (Burton & Scott, 2003; Calver & Page, 2013; Mason, 2004).

Museums, therefore, are reconceived as institutions simultaneously facing multiple constituencies and existing literature appears comfortable articulating competing perspectives around heritage management in museums, highlighting them as issues of contention. Most supply-side studies in this area, however, focus on the perspective of senior managers, senior curators, alongside local communities. The implications of these tensions on service delivery, specifically research capturing cross-organizational perspectives including the perspective of frontline, visitor services staff are less-common.

The heritage sites in this study are – or are in transition to – a more inclusive approach, attempting to inhabit both public-facing and commercial discourses. Inhabiting this discourse implies a service promise to those market segments identified as sources of revenue and visitor growth which, if undelivered, could lead to reinforcement of product over service orientation and visitor dissatisfaction (Camarero & Garrido, 2012).

The potential for tourism to be a source of visitor growth for heritage sites brings with it the potential to service more “niche” markets whose needs may not be met by museums orienting service delivery to more generalized notions of the tourist (Ballantyne & Uzzell, 2011; Kirshenblatt-Gimblett, 1998). Destination marketers and researchers identify heterogeneous tourist motivations and increasingly individualistic demands within such markets (Alexander et al., 2017; McCain & Ray, 2003; Richards, 2018). Personal heritage tourism is one such market focused on consumption of heritage with individuals drawn to places or objects with connections to personalized narratives (Poria et al., 2001). Personal heritage seeks a mode of service delivery responsive to the niche, often bespoke, requirements of this type of tourist (Alexander et al., 2017; Kozak, 2016; Timothy, 1997). One of these personal heritage sectors, ancestral tourism, is seen as a source of potential market growth and this, we will argue, can highlight disjunctures between service promise and delivery.

Delivering ancestral tourism

Ancestral tourism, where individuals are drawn to heritage sites due to perceived cultural origins or familial attachment, often associated with genealogical research, is a growing market (Kramer, 2011; Li et al., 2019; Murdy et al., 2016, 2018). Scholars utilize terms such as *ancestral*, *sentimental*, *diaspora*, *homeland*, *legacy*, *migrant*, *roots* and *genealogical tourism* to discuss these phenomena in varied contexts (Io, 2017; Li & Chan, 2020; Maruyama & Stronza, 2010; Ndione et al., 2018; Ponting, 2022; Tie et al., 2015; Yankholmes et al., 2021). Ancestral tourism is the preferred term of national tourism organizations in Scotland and Ireland and draws various terms under a unified heading (Alexander et al., 2017; Wright, 2009). Providers of ancestral tourism include traditional heritage sites (Timothy, 2020), but also libraries and archives, not usually associated with commercial tourism (Alexander et al., 2017). Like other public institutions, sites are not only visited by conventionally defined tourists but local and other day visitors, with providers often struggling to accommodate demand diversity (Leask, 2016).

Tourists with perceived personal connections to places, historical events or periods have distinct needs and behaviors (Poria et al., 2003, 2006; Timothy, 2018). Existing research illustrates service delivery challenges with tourists often proffering detailed

Table 1
Sites of enquiry.

Sites of enquiry	General themes/Services of relevance
The Family History Centre in Mitchell Library	Glasgow City Archives, NHS Archives, Special Collections and Registrars Genealogy Centre. Collections include national and local authority records, books, maps, and photographs.
Riverside Museum	Exhibits relating to Glasgow's industrial past, transport and technological development.
Gallery of Modern Art (GoMA)	Contains library with books on Glasgow history, and exhibition on history of this 18th-century neoclassical townhouse.
Kelvingrove Art Gallery and Museum	Collections of international significance, some relating to Scottish and Glasgow history.
Provand's Lordship	Built in 1471 and Glasgow's oldest surviving building, with insights into medieval past.
St Mungo Museum of Religious Life and Art	Includes exhibits on Glasgow's religious past and located next to Glasgow Necropolis, a Victorian cemetery.
People's Palace	Focuses on Glasgow's social history, demonstrating working and home lives and leisure activities from the 18th to the 21st century.
Scotland Street School Museum	Designed by Charles Rennie Mackintosh, first opened as school in 1906. Shows history of the school and surrounding area, and examples of historical classrooms.
Glasgow Museums Resource Centre (GMRC)	Collection storage. Daily themed tours, bespoke visits to view collections.
Kelvin Hall	Stores collections with viewings by appointment. Contains National Library of Scotland and its Moving Image Archive.

knowledge about ancestors and desiring to add to it through confirmation and extension within the framework of a specific destination of family origin (Alexander et al., 2017; Bryce et al., 2017). The personal demands of these tourists can result in role conflict for professional heritage service staff (Murdy et al., 2016). While various studies identify economic opportunities from ancestral tourism, they also highlight a need to explore associated challenges. Given much existing research focuses on smaller-scale settings, it is useful to look at how specialist markets like ancestral tourism could present difficulties for larger public institutions providing a wider array of services at higher volume.

Methodology

This research develops understanding through interactions with participants across a large organization, drawing multiple meanings through reflection and interpretation. Positioned within interpretivism, the ontological assumptions underpinning this study view the representation of reality as socially constructed. The approach centers on a subjectivist epistemology and "double hermeneutic" where researchers are "shaped by and shape experiences and accounts", mediate meanings between participants and readers (Cunliffe, 2011, p. 654). The project aims to understand the challenges faced by staff when delivering specialized services and how these challenges impact tensions surrounding public heritage missions.

Research context

Our study context is Glasgow Life, responsible for Glasgow's destination marketing as well as the city's cultural, leisure, and heritage assets including museums, libraries, and archives – notably relevance for ancestral tourists (see Alexander et al., 2017). Glasgow Life receives around 70 % of funding from local government to deliver these services to citizens and visitors (Glasgow Life, 2022). Operating as both a charitable organization and Community Interest Company (CIC), Glasgow Life's remaining funds are from donations and externally generated income.

Data collection focused on provision of ancestral tourism related services within Glasgow Life, with access to employees across the organization. One senior employee acted as gatekeeper ensuring access and facilitating progress. Relevant participants at each site (see Table 1) were identified, alongside relevant internal reports (e.g. Annual Reports, Visitor and Tourism Plan), and organizational charts. Meetings and events were attended by one of the researchers where the research was introduced, and participants recruited. Table 1 introduces each of the sites of enquiry, which all offer free entry.

Research strategy and design

To develop understanding of the complex services and resources available to tourists and how these coalesce across the organization, one of the researchers utilized mobile qualitative methods to explore participants' understanding of ancestral tourism in their own organizational setting (e.g. Carpiano, 2009; Costas, 2013). Mobile methods address the challenge of gaining insight in busy, spatially dispersed places through a combination of observation and interviews obtained by accompanying participants in their daily work environments (Johnstone et al., 2019). Variously described as *talking whilst walking* (Anderson, 2004), the *go-along* (Carpiano, 2009; Kusenbach, 2003), and the *walking interview* (Evans & Jones, 2011), Evans and Jones (2011), p. 849) stress that these techniques produce "richer data, because interviewees are prompted by meanings and connections to the surrounding environment". Mobile methods also facilitate incidental encounters (Pinsky, 2013) and informal interactions in the field, which supplement understanding of organizational settings (Fayard & Weeks, 2007). Where a participant's role was desk-based, or time permitted, face-to-face, 'sit-down' interviews were used.

Table 2
Summary of research participants' roles.

Role	No. of participants' interviewed	No. of informal conversation participants
Management-managers/Assistant managers (M)	17	4
Information-curators/Archivists/Librarians/Registrars (I)	12	7
Visitor services-frontline/Gallery & learning assistants (V)	9	38
Total	38	49

Sampling

Sampling was non-random, including both purposive and snowball approaches. Some participants were identified by our gatekeeper and these participants subsequently recommended other relevant employees who encounter ancestral tourists. Research commenced with a site visit. Here, the research was introduced and appointments for interviews made alongside explanations of the researcher's role and intention to spend extended time at each site (including participation in meetings and events) and that informal conversations with staff would also be used in the final research (Fayard & Weeks, 2007). Anonymity of participants was assured throughout the process, and consent obtained before any interaction (Miller & Bell, 2012). For incidental encounters, data was treated in the final write-up as field notes (Pinsky, 2013).

Data collection

Data was collected over an 18-month period and consisted of interviews, observations, and informal conversations across the sites of enquiry (see Table 1) with a total of 87 participants. Interviews used a "guided conversation" approach, recognizing researcher involvement in the research process and accounting for the social construction of meaning and context (Rowley, 2012). Conversations began with accounts of participants' roles and responsibilities and, if appropriate, a tour of the museum or facilities focusing on aspects relevant for ancestral tourists. Staff experiences of delivering ancestral tourism were captured and focused on themes of heritage management and heritage missions.

Interviews were held with 38 participants (14 sit-down and 24 mobile interviews) and, according to availability, were one to one or in small groups of up to four individuals; informal conversations were held with an additional 49 individuals. Interviews were conducted in situ, lasting between 30 and 120 min. In several cases, clarification was sought through follow-up interviews or email exchanges, as required. Participant roles (see Table 2) varied from visitor services staff to curators, archivists, and managers.

Sit-down, face-to-face interviews were audio-recorded (with permission). The mobile interviews were all undertaken in public spaces (e.g., museum exhibition hall), with other staff and members of the public in proximity, creating both ethical and practical issues to reconcile. As a result, extensive notes were taken at each interview in lieu of a recording, both during and directly following the interview (Angrosino, 2007). After each interview, notes were written up immediately and sent to each interviewee for member checking, to ensure the validity of the findings (Creswell & Miller, 2000). A reflective diary was also maintained throughout the data collection period, in line with double hermeneutic approaches describing a hermeneutic spiral in which researchers develop their understanding through ongoing engagement with participants, reflection, analysis, and discussion with other researchers (Hatch & Yanow, 2005; McKemmish et al., 2012).

Data analysis

Participants were given pseudonyms to distinguish between them, the first two letters represent the location or area where the participant is employed (Glasgow Museums (GM), Family History Centre at the Mitchell Library (FH), General Marketing (MA)). For job roles, M signifies *management*, I represents the *information* category, and V for *visitor services* (see Table 2 for more details).

The double hermeneutic perspective of this study acknowledges that research aims, background, literature, interactions with participants, and reflection contribute to the researchers' understanding and interpretation (Schwandt, 2000; Tsoukas & Chia, 2011). This process assisted data analysis, which began soon after data collection commenced. Observational field notes and interviews were transcribed and, after member checking, imported into NVivo software. A period of immersion followed to ensure familiarity with the data, raise questions, and assess the extent to which study aims could be addressed. Thematic analysis was the principal method for analyzing the data, using an abductive interpretive process with literature revisited throughout to inform findings (Cunliffe, 2011). Throughout this process, the researchers checked for duplication and overlap of concepts, merging coded data or adding new codes to clarify understanding.

The overarching theme of ancestral tourism served as a hermeneutic starting point for data analysis, the aim being to understand ancestral tourism provision and the complexities of delivering this form of personal heritage tourism, subsequently subcategorized into types of ancestral tourism based on existing literature; *genealogical* and *roots/diaspora/homesick/legacy* (see Alexander et al., 2017). This analysis assisted in developing the researchers' knowledge and how types manifested across the organization.

Researchers developed themes based on personal heritage tourism research and provider perspectives on ancestral tourism. Sub-themes were created in relation to the challenges of delivery, such as *personal, emotional experiences* (Alexander et al., 2017; Poria et al., 2003), *high expectations* (Alexander et al., 2017; Wright, 2009), *preconceived notions of ancestry* (Bryce et al., 2017; Murdy et al., 2016), and *individual, bespoke services* (Murdy et al., 2016; Santos & Yan, 2010). These themes were embedded into the interpretive process, with researchers drawing on wider literature on heritage tourism and heritage management to create emergent sub-themes, representing the ongoing hermeneutic spiral. Findings are introduced in the following section, demonstrating the challenges of delivering bespoke services within an urban, public heritage environment.

Findings and discussion

Our findings illuminate the tensions surrounding ancestral tourism and public heritage provision as museums adapt to visitor-centered service delivery modes. By revealing the challenges encountered by staff when delivering bespoke services in a large public heritage organization, findings provide empirical evidence suggesting that the needs of specialist markets, such as ancestral tourism, may not be met by organizations orienting service delivery to support general tourism growth (e.g. Ballantyne & Uzzell, 2011). The two areas where tensions could be observed were around personalization and commercialization.

Challenges of personalization

A range of challenges emerged in relation to personalization, the most salient being the time-consuming nature of enquiries. In the Family History Centre, staff cater to ancestral tourists and local visitors researching family history, but lack time due to competing priorities such as online public enquiries, cataloguing, and digitization: "*we have regular duties to fulfil… there is a constant stream of enquiry work happening in the background*" (Participant FH-V-123). The heterogeneity of ancestral connections and breadth of sources is a further challenge, as a front-of-house participant explains*:* "*The answer to so many family history questions is 'it depends!' …information and signage is usually just overwhelming and too much to take in*" (Participant FH-V-123). Another admits to technical challenges: "*there's a plethora of portals… some confusion about where to find information, overlaps, possible duplication*" (Participant FH-M-104). Participants attempt to direct visitors to resources to fulfil their own research, but visitors often lack the skills required, needing specific direction: "*It's not just handing them a book… It's more in-depth; we need more time with them*" (Participant FH-V-122). Unlike prior studies where providers sometimes conducted genealogical research on behalf of visitors (e.g. Alexander et al., 2017), participants stress that "*we don't have the ability to spend more time*" with visitors (Participant FH-V-122).

A further challenge around resources was associated with organizational infrastructure supporting heritage enquiries:

> *Some of the finding aids aren't the best… and we can spend more time locating the sources, time that could be spent with enquiries. We've got collections but don't know where… they're not properly catalogued… It's a time and resources issue.*
>
> (Participant FH-V-123)

Ancestral tourists commonly seek information on burial records. Not all are indexed, presenting a specific challenge for staff and visitors when locating information: "*The biggest gap is the burial records… but there's the issue with time/resources to do this*" (Participant FH-I-101). Retrospective cataloguing was emphasized as "*something that would almost certainly help open up access to the library's materials and make finding out about and sourcing what we have much easier*" (Participant FH-V-123). However, it also "*takes a lot of work*" (Participant FH-I-112). Hence, while improving collection visibility supports widening access (e.g. Keene et al., 2008), this represents an ongoing task, and human resource, which participants stressed was lacking. In addition, while enhanced records could improve access, the bespoke nature of ancestral enquiries presents a further challenge with visitors needing support to navigate available resources.

Awareness of challenges was evident from interactions with curatorial staff. As one curator acknowledges, "Time is a factor, we normally try and dissuade front-of-house from passing on walk-in enquiries… the bottom line is, that kind of research takes so much work" (Participant GM-I-103). This attitude can be traced to guidance from senior management, notes from a curator meeting reveal: "curators said they had received an email advising them to limit the time that they spent on individual enquiries given that resources were squeezed. They expressed some frustration with this…front-of-house were left to cater to visitors' needs" (field notes, curatorial meeting). The outcome here includes curators and archivists voicing concerns that visitor services staff are "providing the wrong information" (Participant FH-M-101). However, visitor services staff were reported to be responding to the needs of large queues of ancestral tourists on short visits, trying to provide satisfying experiences as possible offsets to staffing and resource constraints.

This section identifies challenges around delivery of personalized heritage illuminating tensions surrounding heritage and the professional integrity of interpretation (e.g. Aroles et al., 2022; Bryce et al., 2017). Challenges around time, infrastructure and the heterogeneous nature of the market, highlights a tension around resourcing for heritage. Specialist curatorial staff were unable to deliver personal consultations demanded by visitors, dealt with inadequate systems and, in some cases, were actively discouraged from serving visitors.

Personalization and curatorial integrity

The integrity of the curatorial role has ongoing importance within the findings. One of the characteristics of ancestral tourism is a susceptibility within diasporic communities to reinterpret history and embrace mythology associated with the past (Ndione et al., 2018). This presents challenges for curatorial integrity. One employee explains that visits are "*an extension of the make-believe…accuracy is an issue*" (Participant GM-I-111). Other visitors want "*to know about the clan they're from*" (FH-V-122).[1] As a result, front-of-house staff, often without access to heritage professionals' expertise, attempt to provide an acceptable level of service, even if based on imprecise assumptions: "*we'll find a place in Scotland to do with a clan name… then they can go and visit*" (field note); "*we Google it for them, to find the clan area and print it out for them*" (Participant GM-M-126). This challenge highlights a tension between the resources available to staff, and their expertise, when responding to such queries. Constraints of time and perceived opportunity costs combine with the heightened expectations of visitors. Outcomes are pressure felt by staff to provide some kind of service even if information provided may be general in nature.

Participants acknowledged these issues, admitting that "*we have to adapt their vision*" (Participant FH-M-138), and many emphasizing the lack of time and resources to do so: "*[Ancestral tourists] would like us simply to produce what they ask for [and] they don't want to bother with wading through information, suggestions, guides and procedures… [we're] not resourced to offer that service*" (Participant FH-V-123). The challenge of balancing professional integrity while providing satisfying visitor experiences was also expressed: "*they don't want to hear about differing accounts… they believe their own family story that has been passed down*" (Participant GM-I-103). Heritage providers are faced with the ethical challenge of "intervening to disprove or modify" these perceptions (Bryce et al., 2017, p. 49). Our participants are aware of this ethical challenge: "*to what extent do we let go of reality… tell [them] that they are not from a line of princesses and seeing their disappointment?*" (Participant GM-M-116). Responses to ancestral tourists with preconceived notions of ancestry varied across different roles. Visitor services staff, perhaps less saddled by curatorial responsibility, appeared more willing to adapt their service to suit visitors' needs, despite the time-pressured environment.

Some ancestral tourists contact museums or archives in advance of a visit with enquiries relating to documents or objects on display. While this could minimize challenges for front-of-house staff, participants emphasized the detailed curatorial work associated with these requests and that documents or photographs shared via email could not always be checked before visits. As one participant articulates, "*there's the verification element. How much do you want to do cross-referencing to ensure that the piece is corroborated?*" (Participant GM-I-103). Another participant shares, "*people are enthusiastic… but I feel that we can't just take their word for it. We need to check accuracy; people will dispute what has been said*" (Participant GM-I-117). The attention to professional curatorial integrity is once again evident (Bryce et al., 2017; Murdy et al., 2016), but the potential in these personal heritage encounters is challenged when lack of resources inhibits the time available to verify visitor information.

In this section, the challenge for curatorial integrity is balancing a need, on one hand, to correct erroneous assumptions, while, simultaneously, mediating experiences for ancestral tourists by providing them with "*something they can go away with*" (field notes) or directing them to museum displays to provide a targeted heritage experience. Thus, we build on calls to understand whether producers could better account for interpretive issues (Farrelly et al., 2019) and offer useful insight from a provider perspective. The challenges herein illuminate tensions around varying interpretations of heritage, and the ability of providers to deliver an appropriate visitor experience where heritage is contested or viewed through a personal lens.

Personalization and bespoke experiences

Another challenge we observed related to the deeply personal nature of ancestral tourism. For ancestral visitors, "experience is determined by people's personal connections to the place they visit" (Timothy, 2018, p. 78). Participants described "*emotional experiences*" with encounters requiring more effort in diplomacy and sensitivity than general visits, reflecting prior research with heritage providers (e.g. Murdy et al., 2016). A frontline employee illustrates the endeavor required when assisting ancestral tourists:

> It was nearly closing time… I heard the man's story and went to the manager to see if they could open [the room with ship models] for him because he'd come all this way… I left him… for a little while and when I came back, he was in tears… These were all the ships that his father had talked about.
>
> (Field notes)

Another participant notes the complexity of ancestral enquiries: "there's this multi-layered aspect of family history… It's like a skeleton, adding meat to bones… questions like where was it the ancestors lived, can we visit? How do you get there?" (Participant FH-M-105). Participants were aware that satisfying these visitors required a personalized, but also emotionally fulfilling, experience (De Rojas & Camarero, 2008; Zhang & Smith, 2019).

Awareness of individual audiences is deemed vital for effective heritage management (e.g. Leask, 2016). Here, findings demonstrate most front-facing participants understood varying needs from ancestral tourists. However, we also observed a disconnect

[1] A common misunderstanding concerning surnames due to popular associations between membership (real or imagined) in a Scottish "clan" and specific clan territories (Basu, 2005).

between frontline and managerial perspectives. For example, a conversation with a manager reveals a lack of awareness of the museum role within ancestral tourism provision:

> [Ancestral Tourism] had come up at a management meeting, and we were advised […] that Archives were dealing with this and that it wasn't so much a museum thing – so management dropped it… But ancestral tourism might be something that we are doing without knowing it… We're aware that ancestral tourism is a prioritized market, but […] there are no programs or workshops for ancestral tourism in museums… almost no delivery of ancestral tourism.
>
> (Participant GM-M-115)

Similarly, the wider organization's marketing efforts for ancestral tourism focused on the Family History Centre resources for genealogical research only. As a respondent claims, "*the link is missing for museums*" (Participant GM-I-111). Another participant admits that the ancestral tourism marketing centers on "*on the local market, family history… aimed at wider West of Scotland, not so much international*" (Participant MA-M-109). For museums, the same participant stresses that "*places like People's Palace have collections about life in Glasgow, but it is not apparent for ancestral tourism; there's not the push anyway*" (Participant MA-M-109). Hence, although research underlines the importance of understanding audience needs to appeal to specialist markets (e.g. Camarero & Garrido, 2012; Leask, 2016), the findings from a marketing perspective imply that only nascent awareness of the requirements and potential of ancestral in museums exists. Even where ancestral tourists' bespoke needs were identified, most respondents were unable to offer the type of service these visitors require: "*we're not always able to help, and we have a sense that they're disappointed*" (GM-I-117).

Consequently, while museum policies and planning strive to both improve accessibility to wider audiences and respond to specialist markets (Camarero & Garrido, 2012), our findings underline a crucial disconnect between service promises directed at visitors and the service delivery they experience. This disconnect is exacerbated by different levels of understanding from front-line/curatorial staff and those of managers, contributing to challenges around service delivery and, thus, illuminating a tension between the strategy towards, and delivery of, personalized heritage.

Commercialization of public heritage

The second area of tension was around commercialization. Overall, participants expressed concern around the commercialization of heritage and tourism, summarized by the following participant:

> We have a balance to keep between what our objectives are: social inclusion/cultural engagement and tourism. 'Tourism' has been a bit of a bad word … There are tourists, but many [are] local visitors, and our energy goes into these other goals.
>
> (Participant GM-M-115)

In parallel, respondents were aware of resource constraints due to cuts in public funding and the need to generate income to ensure museums are financially viable, reflecting existing understanding of commercial pressure (Aroles et al., 2022; Gurian, 2020). The tension between balancing conservation, access, visitor experiences and commercialization noted in existing studies (Rentschler & Gilmore, 2002), was extended in our research through multiple perspectives on the order of importance attached to different heritage goals.

Free access is a core part of Glasgow museums where access to public heritage is a priority: "*[we're] keen to make the city's collection accessible, to ensure greater use, improve awareness*" (Participant GM-I-127). Other interviewees, however, voiced concerns over promoting the Family History Centre for ancestral tourism, often relating to the challenges noted above and inability to meet heterogeneous user needs. Coordinating services for tourism, many participants expressed, should be balanced alongside other goals: "*it's not just for tourists; family history is of interest to many*" (Participant FH-M-104). Alongside tensions around widening access, commercializing heritage for tourism purposes was also contentious, reflecting broader concerns regarding heritage commercialization and marketing (e.g. Calver & Page, 2013; Garrod & Fyall, 2000; Rentschler & Gilmore, 2002).

Despite awareness of the need to cater to various audiences, our findings demonstrate no clear strategy on how this might be achieved. Commenting on Glasgow's recent tourism strategy, an interviewee emphasizes a management shift towards tourism but highlights, "*there's not necessarily a clear route; [it's] not incorporated into our roles*" (Participant GM-I-127). Furthermore, public funding cuts means that the ability to respond to new heritage markets is compromised, as one curator admits: "*It's a time of austerity. Looking at Glasgow Museums, services [have] actually diminish[ed]… in reality, there are not the resources… We may have the best intentions, but the ability to deliver is another thing*" (Participant GM-I-111).

Whilst specialist markets such as ancestral tourism may offer income-generating opportunities, there is a lack of consensus on how to balance competing heritage goals. In staff meetings, discussions centered around confronting these challenges:

> The conversation was on… potential sources of income… It was suggested that curators should charge for enquiries that take over half an hour, but many voiced their discomfort with this.
>
> (Field notes, curatorial meeting)

Notably, there was minimal agreement on ideas for generating income and no clear guidelines on how to balance tourism with other heritage imperatives:

> Some are frustrated that there's not a clear steer on that… with tourism, it's complex, how do we apply this in different venues… I'd expect we'll continue to try to balance the need for visitor figures and income with our more local and equality-related objectives.
>
> (Participant GM-M-128)

Lengthy, personalized enquiries are a feature of delivering ancestral tourism, and although staff emphasized that some visitors were willing to pay for bespoke services, others may be unable or unwilling. Hence, strategy and guidelines around developing ancestral tourism services were embryonic and may conflict with the promotion of inclusive practice and widening access (Goulding, 2000a; Mason, 2004). Drawing from non-heritage settings, non-profits can struggle to adapt their missions to external changes fearing criticism for prioritizing financial stability over social purpose, and scholars emphasize the importance of strategic management and clear indicators to improve performance and create value (Moore, 2000; Santos et al., 2021).

As museums seek to adapt to the needs of diverse audiences, and where public heritage organizations are facing increasing pressure to demonstrate social value by widening access, but also to generate income, there is potential for tensions to arise (Minkiewicz et al., 2014; Timothy, 2018). Our findings highlight how responding to the needs of niche or specialist tourists in complex heritage organizations is fraught with challenges. The limited presence of specialist curators at each site, difficulties staff face in balancing a multitude of tasks, lack of supporting infrastructure, disconnect between curatorial and managerial understanding of the market, alongside a lack of clarity around commercialization, offers unique insights into the tensions faced by organizations in public heritage management.

Conclusion

This paper used the context of ancestral tourism to explore how the challenges of delivering specialized services impacts on tensions surrounding public heritage missions. Using mobile qualitative methods, the research aimed to understand the challenges associated with delivering and coordinating bespoke services in sites which attract many thousands of visitors and illustrates the difficulties facing public museums and heritage sites when attempting to meet the needs of increasingly specialist audiences.

Theoretical implications

By exploring the implications of delivering niche forms of heritage tourism within a large publicly funded heritage organization, we contribute to public heritage management literature and debates around the commercialization of heritage (e.g. Ballantyne & Uzzell, 2011; Falk, 2016; Gurian, 2020). With a multi-role, cross-organizational focus we identify two main contributions relating to debates on the commercialization of heritage: firstly, we reveal the challenges organizations face when promoting specialized services without appropriate resources which suggest irreconcilability of heritage missions and, secondly, we observe how tensions between visitor-satisfaction and curatorial goals are experienced by frontline employees. In addition, we contribute, at an operational level, to literature on ancestral tourism by revealing the challenges associated with delivering this product in complex, multi-faceted organizations.

Commercialization and accessibility challenges

Our research illuminates the tension between aspirations for greater public access and increased exploitation of commercial opportunity, suggesting these heritage missions are irreconcilable without agreement and strategic direction. In relation to the commercialization agenda, our research points to conflict between community accessibility and broader tourist appeal. By revealing the challenges associated with organizational attempts to meet the needs of a heterogeneous group of users, including local residents and tourists, we extend existing understanding regarding heritage commercialization and the marketing of public heritage (e.g., Farrelly et al., 2019; Rentschler & Gilmore, 2002; Timothy, 2018).

Our findings suggest that whilst financial viability of specialized services like ancestral tourism was understood in an abstract way, conflicts between accessibility and revenue generation meant that basic details (such as an appropriate pricing structure) could not be agreed on. In a similar vein, our findings indicate that the uniquely personal nature of ancestral tourism, where every visitor requires a customized combination of services, means that generic visitor orientation strategies (e.g. focussing on new audiences and new products such as technological innovations, see Camarero et al., 2015; Gombault et al., 2016) may not be appropriate due to the level of granularity expected in the experience. Overall, our data hints at significant challenges for organizations who seek to commercialize specialized heritage offerings. Despite a willingness in organizations to promote certain services, the ability to articulate the service and create appropriate operational strategies is another matter.

Implications of commercialization tensions across the organization

The tension between commercial and curatorial objectives is well understood and was articulated earlier in this paper (e.g. Aroles et al., 2022; Bryce et al., 2015; Falk, 2016). Our research extends this work by revealing how this tension extends to the operational sphere. In our case promoting ancestral tourism is seen as a central part of a heritage tourism strategy and yet several of our curatorial interviewees were unclear how the strategy related to their part of the organization. However, a focus on improving visitor experiences associated with the commercial agenda (see Aroles et al., 2022) meant that frontline employees often found themselves at the sharp end of this tension. While frontline staff recognized the need to appeal/improve visitor experience, a lack of adequate framing of the ancestral tourism offering, or training, meant that specialist markets' needs were not always met. We found a disconnect between different levels of organization either wanting to ensure integrity of collections (curatorial) or attempting to 'satisfy' (commercial) the visitor as consumers, with the result being frontline staff attempting to 'negotiate' an acceptable visitor experience.

Our focus on ancestral tourism adds an additional dimension to this debate. Existing ancestral tourism research highlights the emotional nature of ancestral encounters associated with the deeply personal nature of the expectations of the visitor (e.g. Alexander et al., 2017). In our case, facilitating these emotional experiences usually fell on frontline staff who struggled to balance their desire to provide optimal services against the constraints of their role and lack of support by curatorial colleagues. Zhang and Smith (2019) note the importance of understanding the emotional engagement of tourists interacting with heritage sites. We present this as yet another challenge for museum staff faced with complex and heterogeneous visitor requirements.

Ancestral tourism in complex settings

Our study also offers a valuable additional contribution to literature on ancestral tourism. Here, the tension between curatorial and commercial objectives is acute as the requirements of specialist (niche) tourism offerings appear poorly understood and articulated, with the result that larger, more complex, organizations may struggle to deliver appropriately personalized services. Alexander et al. (2017) and Bryce et al. (2017) note how local actors enrich visitor experiences and draw on local knowledge, highlighting the importance of community involvement. Delivery involves intense, lengthy interactions between visitors and providers, often in facilities not viewed as tourist-facing. In our study, the organization offers experiences to thousands of individuals daily. Staff have other duties to perform within this large urban organization with limited time or resources to deliver the personal experiences required. Like Alexander et al. (2017) we recognise a challenge for providers to meet specialist, in-depth needs, but this effect appears amplified in the larger heritage management setting.

Managerial implications, limitations and future research

Exploring sources of tensions can assist in improving heritage management, informing strategies to mitigate negative impacts and provide direction for staff. However, this study revealed a lack of agreement on income generation strategies, with participants identifying no clear guidelines on balancing tourism with broader heritage missions. Identification of potential economic benefits from specialist markets such as ancestral tourism, suggest opportunities for income generation by possibly combining the services of public and private organizations. However, there are implications from service failures and potential conflict related to access to public heritage resources which highlight the need for clear, strategic decision-making to address them. This study suggests that without an agreed vision and strategic direction within organizations, competing heritage missions can be irreconcilable.

With increasing pressure on public heritage sites to respond and appeal to heterogeneous audiences, this research emphasizes the need to understand the complexities of catering to the demands of specialist markets. We recognise that this study focuses on one context, suggesting the need for further research exploring provider perspectives in multiple heritage sites and around other niche offerings. Also, while there is extensive research investigating the demand characteristics and behavior of ancestral tourists, supplier perspectives remain under-explored. Scotland is but one context and the complex web of expectations is likely to differ across a wide range of diasporic communities, presenting varied and complex challenges for providers in the "home" destinations to which they return. Therefore, the nuances of providing services to personal heritage tourists in a range of further contexts merits exploration.

CRediT authorship contribution statement

Jane Johnstone: Conceptualization, Methodology, Data curation, Investigation, Formal analysis, Writing - original draft, Writing - reviewing and editing.

Derek Bryce: Conceptualization, Funding acquisition, Methodology, Formal analysis, Writing - original draft, Writing - reviewing and editing.

Matthew Alexander: Conceptualization, Funding acquisition, Methodology, Formal analysis, Writing - original draft, Writing - reviewing and editing.

Data availability

Data for this study has been deposited at University of Strathclyde: https://doi.org/10.15129/261b2c42-cbc6-420f-87bd-38464396a1ad. Due to the sensitive nature of some data all access is restricted.

Declaration of competing interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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