



Market Report

A Snapshot of your Market Sector

Ancestral Tourism

This pack has been designed to provide information on setting up a business in the **Ancestral Tourism** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **January 2024**. If you find the information contained in this document useful, tell us about it! Send us feedback [here](#); we will use your comments to help improve our service.

What do I need to know about the Ancestral Tourism market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ Scotland's tourism market continued to post the strongest recovery into Q3 2023 (**up 14% vs Q3 2019**) with **1.4m visits**. **Spend reached a record £1.5bn** (up 43% vs Q3 2019). In Q2 2023, the most common trip purpose for taking an overnight trip in Great Britain was **visiting friends or family (10.3 million trips, 35% share)**. (Visit Britain, *Great Britain Tourism Survey*, October 2023).
- ◆ Over the next five years, tour operators will need to adjust packages, deals and holiday destinations to suit changing preferences. They'll strive to attain competitive advantages by integrating more personalised services, including mobile booking platforms, and offering more niche, specific tours. Industry revenue is forecast to **rise at a compound annual rate of 3.7% over the five years through 2028-29 to reach £18.2 billion**. (IBISWorld, *Tour Operators in the UK*, October 2023).
- ◆ The number of inbound tourists expected to the UK over the five years through **2023-24 is 39.5million people** and is forecast to **grow to 46.2million by 2028-29**. The three main reasons that visitors come to the UK is for holidays, business or to visit friends and relatives. According to the International Passenger Survey, holidaying accounts for the majority of visits usually with 41% of the total, followed by visiting family and friends. (IBISWorld, *International Tourist Numbers*, August 2022).
- ◆ Historic houses and properties, visitor and heritage centres, and gardens saw the greatest annual increase in visitors in 2021 following the significant declines seen across the industry in 2020. Admissions to **gardens increased by 40%** in 2021. Admissions to wildlife attractions and zoos increased by 46% in 2021, with **historic houses and castles increasing by 45%**. (Mintel, *Visitor Attractions UK*, December 2022).
- ◆ Ancestral tourism is a growing and important market for Scotland. At least **40 million people across the globe able to lay claim to Scottish ancestry**. The main ancestral tourism source countries for Scotland are the USA, Canada, and Australia. Over 25% of respondents of these countries cited Scottish ancestry as a major motivation for their trip. More than a third said their ancestors lived in Scotland. (Visit Scotland, *Ancestral Tourism Toolkit*).
- ◆ The national organisation for this industry is [Visit Scotland](#). Other industry bodies include [Association of Genealogists and Researchers in Archives](#), [Association of Independent Tour Operators](#), [Scottish Tourism Alliance](#), [Edinburgh Centre for Global History](#), and [Highland Archive Centre](#).



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Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **Mintel – Domestic Tourism UK (December 2023)**. 37% of respondents surveyed gave ‘Discovering history/heritage’ as one of the key factors in choosing a UK holiday in 2023. Key areas of strength for domestic tourism include its varied offer to suit all budgets, including lower cost breaks such as camping and holiday parks, alongside the growth of higher value sectors such as cottage holidays, wellness, and special interest breaks. City breaks, seaside breaks, and holiday cottages are the most popular UK trips. Summer 2023 saw the launch of the Kirkpatrick *Coast-to-Coast* [cycle route](#), a new 250-mile route running across South Scotland from Stranraer to Eyemouth. VisitScotland expects the route to attract up to 175,000 new visitors to the region, with a direct spend of £13.7 million per year.
- ◆ **Mintel – Visitor Attractions UK (December 2022)**. The number of people visiting historic buildings and museums increased in the 12 months to August 2022 compared to the previous year. Museums gained an 8% increase, whilst historic buildings gained 6%. For many indoor attractions, 2022 marked the first year of doors being fully open for the entire year. It is expected that these attractions will remain popular options over the upcoming years due to many having no or low entry fees, which have become increasingly attractive for visitors amid the cost-of-living crisis.
- ◆ **1921 Scottish census (National Records of Scotland)** was released in November 2022. This information provides a glimpse into the home and working lives of Scotland’s people 100 years ago. Family-history website [Scotland’s People](#) has been updated to include over 9000 volumes of enumeration district books, comprising more than 200,000 images of 4.8 million individual records. (www.scotlandspeople.gov.uk.)

There are also a number of online resources you may find helpful:

- ◆ **Visit Scotland** has an ancestral tourism toolkit with useful links for marketing and business planning, and a list of support services across Scotland. ([Ancestral Tourism Toolkit](#)).
- ◆ **The Scottish Council on Archives** is an independent advocacy and development body for the archives and records management sector, providing leadership and building capacity. The Ancestral Tourism page features a new film called ‘Coming Home: Ancestral Journeys in Scotland’, Case Studies and Useful Links. ([Scottish Council on Archives](#)).
- ◆ **Genealogy & Ancestral Tourism in Scotland** from **Scottish Tourism Guides Association** ‘Find your guide’ tool helps you to find a guide for a holiday in Scotland that can help you find someone with local and historical knowledge. ([Scottish Tourist Guides Association](#)).

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How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#) ,[Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**



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What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please info@bgateway.com or by calling **0300 013 4753**.

Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.

How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) ["Find a Chartered Accountant"](#) tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk ["Licence Finder"](#) tool

Law Society of Scotland's ["Find a Solicitor"](#) tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

We hope you find this Market Report useful and we'd love to hear your feedback [here](#).

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