



Market Report

A Snapshot of your Marketing 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 **February 2026**.

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:

- ◆ Tourism trends for 2026 are forecast to feature delivery of experiences for travellers on a personal development, social impact, and sustainable level. Customer behaviour drivers include economic pressure, increased AI and technology usage, environmental awareness, and personal health. Ancestral tourism is a growing and important market for Scotland with **40 million people across the globe able to lay claim to Scottish ancestry**. ([Visit Scotland](#), [Travel Trends 2026](#)).
- ◆ Scotland continued to see strong recovery into 2024 with **4.4 million trips/visits** made to Scotland by international visitors, **up 26% from 2019, and up 9% from 2023**. (Visit Scotland, [International Passenger Survey 2024, August 2025](#)).
- ◆ According to the Visit Scotland survey in 2023, 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. Ancestral ties are much more important to Canadian visitors, while Australian visitors have strong family connections, stating visiting friends and family as a key driver. ([Visit Scotland](#), [Visitor Survey 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. Scotland's history and tourist sites attract many visitors. Edinburgh is the second most visited city in the UK offering a key hub for tour operators in Scotland. Operators can benefit from high passenger flow due to the transportation network and wealth of major sites and attractions. Industry revenue is forecast to rise at a compound annual rate of **2% over the five years through 2030-31 to reach £21.9 billion**. (IBISWorld, *Tour Operators in the UK*, January 2026).
- ◆ The Scottish Tourism Alliance (STA) reviews strategies such as the [National Gaelic Tourism Strategy](#) which aims to support the national ambition for Scotland to be the world leader in 21st century tourism. It centres on supporting industry and communities that create experiences that celebrate Gaelic culture, heritage, and language. Their statistics note that a total of 109 million tourism visits were made to Scotland in 2023, resulting in a total visitor spend of £10.8 billion. ([Scottish Tourism Alliance](#), [Fact Sheet, July 2025](#) and [Fact Sheet, June 2024](#)).
- ◆ 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 2025)**. With UK holiday cost increases, domestic tourism is not viewed as a cheaper option to overseas travel. All sectors should promote the quality and uniqueness of their products to justify the rise in price. Lower priced sector needs to maintain value for money following cost of living impacts. The strongest growth is forecast in premium cottage rentals, touring holidays, and specialist packages for wellness and active leisure. 44% of respondents surveyed gave ‘Visiting places of historical interest’ as the leading activity that would appeal most to domestic holidaymakers in 2025, with this appealing mostly to over-45s. Older tourists are also interested in exploring their family history, which represents an opportunity for heritage tourism.
- ◆ **Mintel – Visitor Attractions UK (October 2025)**. Despite growing by two percentage points to 72%, Mintel estimates the number of visits made to UK visitor attractions in 2025 will be five points short of the level recorded in 2019. Despite the overall visiting figures painting a slightly gloomy picture, some sectors are performing relatively well. Gardens, museums and historic buildings have been the most notable winners over the past year meeting visitors’ motivations of quality time with friends/family, relaxation and fun.

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

- ◆ **Visit Scotland – Ancestral Tourism (February 2025)** is an ancestral tourism ‘grow your business’ guide with useful links for marketing and business planning, and a list of support services across Scotland. ([Ancestral Tourism, February 2025](#)).
- ◆ **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 film called ‘Coming Home: Ancestral Journeys in Scotland’ (March 2022), Case Studies and Useful Links. Ancestral visitors are valuable as they stay longer, visit outside peak tourist season, visit areas across Scotland, and are more likely to connect and make repeat visits. ([Scottish Council on Archives](#)).
- ◆ **Family History/Genealogy & Ancestral Tours** The ‘Find your guide’ tool can help you find a guide with local and historical knowledge for a holiday in Scotland. ([Scottish Tourist Guides Association](#)).
- ◆ 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. Scottish census returns taken every 10 years in Scotland from 1841 onwards (National Records of Scotland) can be accessed after registration. This information provides a glimpse into the home and working lives of Scotland’s people 100 years ago.

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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.



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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.

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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