Summary of Ancestral Research
2012

Insight Department
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(Information published January 2013)
Purpose

The purpose of this document is to highlight key research insights from ancestral research conducted in 2012.

The research was conducted for VisitScotland by TNS, with support from ScotlandsPeople (one of the largest online resources of genealogical information).

Research results within this presentation can be used by businesses to help understand Scotland’s ancestral visitors and how best to meet their needs.

VisitScotland will be working with partner organisations, Scottish Enterprise & Tourism Intelligence Scotland on further interpretation of these findings.

Disclaimer

VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does nor warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omissions.

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VisitScotland Ancestral Research Overview of Results
## Summary – Research Insights

<table>
<thead>
<tr>
<th>Growth insights</th>
<th>Precise plans for growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researching ancestry does not follow the usual holiday planning funnel.</td>
<td>Continue to develop relationships with the ancestral research sector and market to those still deciding whether to visit Scotland.</td>
</tr>
<tr>
<td>Awareness of ancestral related products in Scotland could be higher.</td>
<td>Audit of ancestral tourism product on the ground. Establish its ability to meet the demand in order to maximise growth potential</td>
</tr>
<tr>
<td>The greatest barrier to taking a visit is a lack of awareness of how to research ancestry in Scotland.</td>
<td>Promote the services available to ancestral researchers when they visit Scotland. Recognise the range of levels of interest by highlighting resources - from those which are free and suited to independent researchers to the services of professional genealogists and tour operators.</td>
</tr>
<tr>
<td>Emotional reasons can be more important than functional ones when converting an interest in ancestry to a visit to Scotland.</td>
<td>Marketing messages should highlight the once in a lifetime opportunity to walk in the footsteps of ancestors. Messages should feel authentic and personal, supported by testimonies from other visitors.</td>
</tr>
<tr>
<td>Visitors wish to immerse themselves in Scottish culture, spending more time in Scotland and doing more activities than the average visitor.</td>
<td>Ensure that information provided for the ancestral tourist is comprehensive and includes coverage of how to access wider activities, places to eat, public transport and events. Don’t forget that some members of the party may not share the interest.</td>
</tr>
<tr>
<td>There is huge enthusiasm for Scotland amongst people in this market – especially those who have already visited.</td>
<td>Exploit this enthusiasm by developing or partnersing with online discussion forums and social media outlets. Promote the web as a place to share experiences and knowledge – supporting VisitScotland’s marketing activities.</td>
</tr>
</tbody>
</table>
Summary – Key figures on the ancestral tourism market.

• 50 million people in the world have Scottish ancestry
• Estimated 213,000 trips made per annum to Scotland by visitors who take part in ancestral research
• Value of £101 million
• 10 million people with Scots ancestry interested in finding out about their ancestry & visiting Scotland. Two-fifths (43%) are interested in finding out more about their ancestry and plan to visit Scotland for this reason in the next 2 years.
• This equals a potential market of c.4.3 million people who could be encouraged to visit in the short to medium term i.e. next c. 5 years.

• In value terms converting this potential market could be worth around £2.4bn* to Scotland in the short to medium term (i.e. over the next c. 5 years).
Summary - The Needs of the Ancestral Visitor: Tips for Business

**Ancestral visit**
- Sightseeing, researching ancestors and ‘walking in ancestor’s footsteps’ are key elements of an ancestral tourism visit.
- Seeing and experiencing Scotland ‘first hand’ is as important a motivation as conducting research.
- Visitors are ‘immersed’ in Scotland with a very wide range of activities undertaken.

**Specific needs**
- They maybe looking for information on researching their ancestry when here - can you signpost ancestral points of information & online sources, record offices, family history centres.
- They maybe visiting non-touristy places to either visit living relatives or see where ancestors lived - they may need directions or maps of towns/places to help them travel to a very specific street etc.
- They will be participating in non genealogical activities as well, and some of their party may not be undertaking the genealogical activity.
Project Background

The Scottish Government estimate that around **50 million people** in the world have Scottish ancestry with the largest volumes resident in North America, Australasia and in other parts of the UK.

It is estimated that spending time researching genealogy is a key element of the visit in over 200,000 visits to Scotland per year but ancestral links are one of the range of reasons for coming to Scotland in up to 4 times this volume of visits.

Over the last decade or so VisitScotland and its partners have sought to capitalise on the potential to grow the ancestral tourism market, through marketing targeted at the Scottish Diaspora and product development initiatives – most notably the **2009 Year of Homecoming** which attracted an estimated 70,000 additional visitors to Scotland. This event will be repeated in 2014.

This updated research will be used to inform VisitScotland’s brand planning process and by the wider Ancestral Tourism Sector to prioritise their activities in the months preceding the next Year of Homecoming in 2014.

The overall aim of the study was “to refresh the current research detailing the scale of opportunity the ancestral tourism market presents to the Scottish tourism industry.”
Methodology

The combination of research undertaken has addressed VisitScotland’s research objectives.

<table>
<thead>
<tr>
<th></th>
<th>Desk research</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Volume &amp; value of current and potential market</td>
</tr>
<tr>
<td></td>
<td>This stage reviewed the most recent visitor research to provide updated estimates of the volume and value of the ancestral tourism market and some key headline profile details</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Depth interviews with key stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Understanding VisitScotland’s key stakeholders</td>
</tr>
<tr>
<td></td>
<td>This stage provided insights into how VisitScotland’s key stakeholders would use the results produced in this study. Another aspect was to gain insights into trends in ancestral tourism</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Quantitative stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Profile of visitors, visit behaviour, booking and planning</td>
</tr>
<tr>
<td></td>
<td>This stage provided information on the demographic and attitudinal profile of ancestral visitors. Also, motivations and barriers to visiting Scotland, booking and planning behaviours and behaviour during visits to Scotland were captured. A large sample allowed for analysis amongst visitors and future visitors</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Qualitative stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Motivations, influences and a deeper understanding of planning &amp; booking</td>
</tr>
<tr>
<td></td>
<td>This stage provided an in-depth understanding of motivations and influencers behind an ancestral journey and the triggers that stimulate conversion. A key part was how Scotland is researched as an ancestral destination and the significance of ancestry alongside other factors influencing the decision to visit Scotland</td>
</tr>
</tbody>
</table>
Data sources used to estimate market size and potential

**Market size**
- Great Britain Tourism Survey 2011
- International Passenger Survey 2010
- Scotland Visitor Survey 2011

**Market potential**
- TNS Survey of VS and Scotland's People Enquirers – May 2012
- TNS Omnibus survey – May 2012
- Scottish Government
- 2009 American Communities Survey
- 2006 Canadian Census
- 2001 Australian Census
- DTZ estimates of proportions of those with ancestral links interested in genealogy
Current annual market size (a)

Visitors whose ancestors lived in Scotland – excludes Scottish residents

<table>
<thead>
<tr>
<th>Country</th>
<th>Trips</th>
<th>Revenue (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>595,000</td>
<td>£175m</td>
</tr>
<tr>
<td>USA</td>
<td>113,000</td>
<td>£106m</td>
</tr>
<tr>
<td>Canada</td>
<td>59,000</td>
<td>£69m</td>
</tr>
<tr>
<td>Australia &amp; NZ</td>
<td>49,000</td>
<td>£53m</td>
</tr>
<tr>
<td>ROW</td>
<td>10,000</td>
<td>£5m</td>
</tr>
</tbody>
</table>

72% UK 28% International

43% UK 57% International

Sources:
- Great Britain Tourism Survey 2011
- International Passenger Survey 2010
- Scotland Visitor Survey 2011
Current annual market size (b)

Visitors who took part in ancestral research

<table>
<thead>
<tr>
<th>Country</th>
<th>Trips</th>
<th>GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>133,000</td>
<td>£36m</td>
</tr>
<tr>
<td>USA</td>
<td>36,000</td>
<td>£34m</td>
</tr>
<tr>
<td>Canada</td>
<td>11,000</td>
<td>£13m</td>
</tr>
<tr>
<td>Australia &amp; NZ</td>
<td>14,000</td>
<td>£15m</td>
</tr>
<tr>
<td>ROW</td>
<td>10,000</td>
<td>£3m</td>
</tr>
<tr>
<td>ROW</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>213,000</td>
<td>£101m</td>
</tr>
</tbody>
</table>

62% UK
38% International

35% UK
65% International

Sources:
Great Britain Tourism Survey 2011
International Passenger Survey 2010
Scotland Visitor Survey 2011

©TNS 2012
Around a quarter of visitors whose ancestors lived in Scotland took part in ancestral research – higher amongst international market
Market potential

50 million people living outside of Scotland were born in Scotland or have Scottish ancestry

USA 9.4m
Canada 4.7m
UK (outside Scotland) 7.6m
Australia 1.5 million

Rest of the World 22.4 million
includes larger populations in Argentina, Brazil, Chile, Mexico, Russia, Poland

Sources:
TNS Omnibus survey – May 2012
Scottish Government
2009 American Communities Survey
2006 Canadian Census
2001 Australian Census
Market potential

**USA**
5.8 million with Scots ancestry
3.6 million with Scots-Irish ancestry
c. 3% of total population but higher in Mid-West and North East

**Canada**
4.7 million with Scots ancestry
c. 15% of total population but higher in Nova Scotia, British Columbia, Alberta, Ontario.

**UK – outside of Scotland**
7.6 million with Scots ancestry
c. 17% of total population but higher in North of England

**Australia**
1.5 million with Scots ancestry
c. 8% of total population

**Sources:**
- TNS Omnibus survey – May 2012
- 2009 American Communities Survey
- 2006 Canadian Census
- 2001 Australian Census

©TNS 2012
Market potential

Around **10 million people** with Scots ancestry are interested in finding out more about their ancestry. Two-fifths (43%) are **interested** in finding out more about their ancestry and **plan to visit Scotland** for this reason in the next 2 years – ranging from 65% amongst UK residents to c.24% in North America = a potential market of c.**4.3 million people** who could be encouraged to visit in the short to medium term i.e. next c.5 years

**Sources:**
TNS Survey of VS and Scotland’s People enquirers – May 2012
TNS Omnibus survey – May 2012
Scottish Government
2004 American Communities Survey
2006 Canadian Census
2001 Australian Census
DTZ estimates of proportions of those with ancestral links interested in in genealogy

©TNS 2012
Market potential

In value terms converting this potential market could be worth around £2.4bn* to Scotland in the short to medium term (i.e. over the next c. 5 years).

*Please note: This estimate relates to potential total expenditure by ancestral visitors while in Scotland, it does not include GVA or any other economic impact figure

**Sources:**
- TNS Survey of VS and Scotland’s People enquirers – May 2012
- TNS Omnibus survey – May 2012
- Scottish Government
- 2009 American Communities Survey
- 2006 Canadian Census
- 2001 Australian Census
- DTZ estimates of proportions of those with ancestral links interested in genealogy

©TNS 2012
Defining the market size and potential – profile of travellers interested in researching ancestry

<table>
<thead>
<tr>
<th>Average holiday length</th>
<th>8 days</th>
<th>12 days</th>
<th>16 days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of holiday – top 3</td>
<td>29% countryside 25% tour 20% stayed with family</td>
<td>50% tour 18% city based 12% stayed with family</td>
<td>47% tour 14% city based / stayed with family / countryside</td>
</tr>
<tr>
<td>Accommodation choice</td>
<td>As likely to stay in serviced as in non serviced accommodation</td>
<td>Reflecting their longer trip duration tend to stay in a wider range of accommodation establishments</td>
<td></td>
</tr>
<tr>
<td>Part of Scotland visited</td>
<td>2 in 3 visit Edinburgh</td>
<td>4 in 5 visit Edinburgh, on average more destinations are visited during the trip</td>
<td></td>
</tr>
<tr>
<td>Average days in Scotland spent researching ancestry</td>
<td>3.1 days</td>
<td>4.5 days</td>
<td>6.3 days</td>
</tr>
<tr>
<td>Gender split: Male/Female</td>
<td>32% / 68%</td>
<td>39% / 61%</td>
<td>36% / 64%</td>
</tr>
<tr>
<td>Average age</td>
<td>56.7</td>
<td>58.5</td>
<td>59.7</td>
</tr>
</tbody>
</table>

Quantitative stage
Base: All ancestral tourists (640)

©TNS 2012
Researching ancestry is not a straightforward process. It does not follow the usual holiday planning funnel.
Speaking to family members and researching online are usually the first steps... Two in three research their ancestry online before planning a visit to Scotland.
The key problems faced are availability of information prior to certain dates and the cost and time involved.

% barriers to research

- It is difficult to find information prior to certain dates: 44%
- It is expensive: 30%
- Not enough information available online: 28%
- It is difficult to find information specific to my family: 24%
- It is time consuming: 21%
- Very difficult to find the information source online: 19%
- Not enough information available offline: 13%
- Very difficult to find the information source offline: 13%

Q15 What problems, if any, did you face when you were researching genealogy/researching ancestors?

*only statements >10% included

Base: All ancestral tourists (640)
Sightseeing, researching ancestors and ‘walking in their steps’ are key elements of an ancestral tourism visit

- Speaking to family members
- Researching online
- Visiting Scotland, i.e. graveyards
- Researching in Scotland, i.e. records offices
Seeing and experiencing Scotland ‘first hand’ is as important a motivation as conducting research

<table>
<thead>
<tr>
<th>Reason</th>
<th>% UK</th>
<th>% Canada</th>
<th>% US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>72</td>
<td>68</td>
<td>65</td>
</tr>
<tr>
<td>Genealogy/researching ancestors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting a place you've always wanted to visit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting friends &amp; family</td>
<td>53</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Just relaxing</td>
<td>32</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walking / rambling</td>
<td>21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attending a personal special event (e.g. wedding)</td>
<td>18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arts/cultural festival (e.g. Edinburgh Festival)</td>
<td>17</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

60% of both UK and Canadian ancestral tourists visit friends and family compared to just 40% of US tourists.

S3 What have been the reason(s) for your previous holiday(s) and/or short break(s) to Scotland?
Base: All respondents who have been on holiday to Scotland (945), UK (224), US (311), Canada (351)
Importance of sightseeing and researching ancestry...

<table>
<thead>
<tr>
<th>Sightseeing</th>
<th>72</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genealogy/researching ancestors</td>
<td>68</td>
</tr>
</tbody>
</table>

It is important to connect with Scotland by seeing the sites, meeting the people and attending events

- Combined with *sightseeing* in Scotland
  'I have to admit it was combined with *wanting to see Scotland* as well. We took a previous trip to the UK, and everything about it seemed familiar, after that trip I dug deeper into my family I saw how much of it was English and Scottish. So in wishing to return I decided it would be combined with seeing where the family was from and how much more I could learn.'

- Linked to *genealogy events in Scotland*
  'I was able to connect with "Tayroots" who were having a Genealogy Fair in Sep 2011 so we *worked our trip around that event*.'

A visit allows further access to document but more importantly the chance to see places ‘first hand’

- To conduct further research
  'To *research more thoroughly* and *view the actual documentation*. Also the desire to *visit the homes and villages* of my ancestors.'

- Finding exact location where ancestors are from
  'While we knew we were originally McDonalds from Skye, we never found exactly *where* on Skye our actual ancestors lived.'
Other motivators include:

**A special connection with Scotland**
‘As Canadians, we feel a special connection to the British Isles and we had never visited there. Both Scotland and England have ancestral importance.’

**Family responsibilities – several generations and/or extended family often visit together**
- **Taking parents back to their roots**
  ‘I wanted to take my Father back to his roots. He came to Canada in 1923 and never went back. I wanted to find where his family was buried and meet the relatives still living there.’
- **Importance of passing on information to younger generations**
  ‘As I get older, I find it even more important to learn and record facts to pass along to younger generations.’
  ‘Besides a strong interest in history and a natural inquisitiveness, I think that I feel a responsibility to pass this family information on to my children.’

**Visiting living relatives**
- **Talking to living family members**
  ‘See first-hand some of the places where ancestors lived and worked. Talk to living family members to obtain information and recollections.’
  ‘Speaking with relatives (if there are any) who knew your ancestors can also be a rich source of knowledge about them.’

**Walking in the steps of ancestors**
See quotes on the next slide
Walking in the steps of ancestors...

Just travelling the back roads and smelling the air was important. Going into the church where they baptised their children - how great is that!

I think once you have identified the usual births/marriages/deaths from records, you naturally start to wonder about their lives and what they did, if they were happy or not.

To me, to ‘walk in the steps of my ancestors’ is very important if not THE most important thing. The more specific the better. To get to see a house or farm or street address where they would have lived, in addition to the town, the church, etc is fantastic. Also though (and this has never happened) I would love to be able to find actual photos of ancestors that I didn’t already have. That would be a great treasure.

I can research all I want from home, but I can’t stand at the altar of a church or visit a battleground unless I’m here in Scotland. Or see the actual sights that my ancestors saw. I still remember the first time I saw the Firth of Forth Bridge and knew this was something my mother talked about from childhood.

Although I rarely attend church, I just attended a church service at the Dundee Parish of St Mary’s Church...this is where several of my ancestors attended church and were baptised, etc. It was great just to be in there, and thinking about my forbearers.

Walking in the steps of my ancestors is extremely important to me. Even if I cannot identify exactly where they lived and worked, there is a strong feeling of shared memory that I experience in certain places. It is a feeling of roots, if that makes sense to anyone.

One of the main reasons for going to the area where my ancestors were from was to be in the places where they lived, even if a house no longer exists, even looking out over the land where they worked...
Visitors are ‘immersed’ in Scotland with a very wide range of activities undertaken
Northern Americans take part in the greatest range of activities

Q20 What type of activities did you undertake during this holiday and/or short break? *only activities
>30% included
Base: All ancestral tourists (640)
©TNS 2012

% activities undertaken

- Enjoyed the scenery: 76%
- Visited places with ancestral relevance: 71%
- Tried local food: 67%
- Visited a castle/stately home: 56%
- Visited religious building: 55%
- Visited friends & family: 53%
- Walking / rambling: 40%
- Visited a Records Office: 39%
- Just relaxed: 39%
- Visited a Genealogy or Family History Centre: 38%
- Nights out/visiting pubs: 37%
- Visited a Library: 33%
- Visited a museum/art gallery: 31%
- Special shopping: 30%

Non genealogical activity
Genealogical activity
Canadians are more likely to continue their research while in Scotland while Americans have a general interest in visiting places connected with their ancestors.

Q13 How did you research information relating specifically to genealogy/researching ancestors?

*only types of research >25% included*

**Base:** All ancestral tourists (640)

©TNS 2012
A lack of awareness of how to conduct research once in Scotland is a barrier to visiting

<table>
<thead>
<tr>
<th>Reason</th>
<th>% Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm not sure how I would find out more about my ancestors while in Scotland</td>
<td>33</td>
</tr>
<tr>
<td>I would not know how to research my ancestry further when I arrive in Scotland</td>
<td>29</td>
</tr>
<tr>
<td>I do not have time to visit Scotland</td>
<td>27</td>
</tr>
<tr>
<td>Flights to Scotland are too expensive</td>
<td>27</td>
</tr>
<tr>
<td>I don't know enough about my ancestors to plan a visit</td>
<td>17</td>
</tr>
</tbody>
</table>

Q33 You stated that you/your spouse have ancestral connections with Scotland, but you haven't yet been to Scotland to conduct any additional research. What is the main reason(s) for this? *only statements >15% (total) included

Base: All planning to take ancestral trip (625), UK (110), USA (186) Canada (199)

©TNS 2012
UK ancestral tourists plan their trip later than North Americans and one in five UK tourists wait to the last minute to book.

Q12 How far in advance did you start planning this trip? Q12a And how far in advance did you book this trip?

Base: All ancestral tourists (640), UK (128), US (203), Canada (268)

©TNS 2012
Three quarters of North American ancestral tourists stay for over eight nights. Approximately a quarter of UK ancestral tourists have short breaks.

Q4 How long was your holiday and/or short break?
Base: All ancestral tourists (640), UK (128), North America (471)

©TNS 2012
June and September are the most popular months for ancestral tourism. Ancestral tourism does not correlate with high profile Scottish events.

Q2 What time of year was this visit?
Base: All ancestral tourists (640)
UK tourists are less likely to stay in hotels than North Americans. Canadians are more likely to stay in non-serviced accommodation than Americans.

The average number of accommodation stayed in is 1.7.

One quarter of ancestral tourists stay in a relative’s home at some point on their visit.

Q26 What type of accommodation did you stay in?
Base: All ancestral tourists (640), UK (128), US (203), Canada (268)
Edinburgh is the most popular destination. North Americans visit on average 1.5 more destinations during their trip.

82% of North American ancestral tourists visit Edinburgh compared with 45% of UK tourists.

Q19 What part(s) of Scotland did you visit?
Base: All ancestral tourists (640)

<table>
<thead>
<tr>
<th>Area</th>
<th>% Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edinburgh</td>
<td>74</td>
</tr>
<tr>
<td>The Highlands</td>
<td>50</td>
</tr>
<tr>
<td>Glasgow city</td>
<td>49</td>
</tr>
<tr>
<td>Greater Glasgow</td>
<td>38</td>
</tr>
<tr>
<td>Stirling and the wider Forth Valley</td>
<td>38</td>
</tr>
<tr>
<td>Loch Lomond and the Trossachs National Park</td>
<td>38</td>
</tr>
<tr>
<td>Perth &amp; Perthshire</td>
<td>34</td>
</tr>
<tr>
<td>Fife</td>
<td>30</td>
</tr>
<tr>
<td>Aberdeen city and shire</td>
<td>29</td>
</tr>
<tr>
<td>Argyll &amp; the Isles</td>
<td>28</td>
</tr>
<tr>
<td>Scottish borders</td>
<td>27</td>
</tr>
<tr>
<td>Ayrshire and the Isle of Arran</td>
<td>24</td>
</tr>
<tr>
<td>Angus &amp; Dundee</td>
<td>23</td>
</tr>
<tr>
<td>Dumfries &amp; Galloway</td>
<td>23</td>
</tr>
<tr>
<td>Lothians</td>
<td>22</td>
</tr>
<tr>
<td>The Cairngorms National Park</td>
<td>16</td>
</tr>
<tr>
<td>Orkney</td>
<td>5</td>
</tr>
<tr>
<td>Outer Hebrides</td>
<td>4</td>
</tr>
<tr>
<td>Shetland</td>
<td>1</td>
</tr>
</tbody>
</table>

82% of North American ancestral tourists visit Edinburgh compared with 45% of UK tourists.
Likelihood to return to Scotland (for genealogy/tracing ancestors) and likelihood to recommend Scotland to family and friends is high across all countries.

Likelihood to return to Scotland
- UK: 92%
- USA: 78%
- Canada: 85%

Likelihood to recommend Scotland
- UK: 92%
- USA: 95%
- Canada: 97%
Motivators and Barriers to taking an ancestral trip vary by country of origin

<table>
<thead>
<tr>
<th>% potential motivators/barriers for future trips</th>
<th>UK</th>
<th>US</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>More information online</td>
<td>61</td>
<td>49</td>
<td>35</td>
</tr>
<tr>
<td>More affordable accommodation</td>
<td>46</td>
<td>40</td>
<td>27</td>
</tr>
<tr>
<td>More affordable transport</td>
<td>50</td>
<td>35</td>
<td>33</td>
</tr>
<tr>
<td>If information was more accessible</td>
<td>38</td>
<td>31</td>
<td>32</td>
</tr>
<tr>
<td>Not sure how I would find out more about my ancestors in..</td>
<td>34</td>
<td>33</td>
<td>36</td>
</tr>
<tr>
<td>Not sure how to research my ancestry further when in Scotland</td>
<td>33</td>
<td>32</td>
<td>35</td>
</tr>
<tr>
<td>I did not have time to visit Scotland</td>
<td>29</td>
<td>27</td>
<td>28</td>
</tr>
<tr>
<td>If information was more centralised</td>
<td>28</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>I don't know enough about my ancestors to plan a visit</td>
<td>22</td>
<td>20</td>
<td>22</td>
</tr>
<tr>
<td>More packages</td>
<td>21</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>The information available is very fragmented</td>
<td>19</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>I do not have the time to research and plan a visit to Scotland</td>
<td>18</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>I can find out enough about my ancestors without visiting Scotland</td>
<td>13</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>Finding a local travel expert (e.g. a travel agent)</td>
<td>9</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>None</td>
<td>11</td>
<td>11</td>
<td>12</td>
</tr>
</tbody>
</table>

Q35 Which of the following, if any, would encourage you to take a holiday and/or short break to Scotland researching ancestors in the future?

Q33 You stated that you/your spouse have ancestral connections with Scotland, but you haven’t yet been to Scotland to conduct any additional research. What is the main reason(s) for this? *only statements >10% (total) included*

Base: UK (238), US (489), Canada (467)
Opportunities for improvements (1)

**Promoting specialist tour operators and ancestral researchers**
- Greater listing and promotion of genealogy tour operators
- Individual tours / customised tours
  ‘In an ideal world, I would like to enter each of my Scotland ancestral destinations into a planning search page to create a custom made itinerary.’
- Greater promotion of specialists / professional genealogists
  ‘Maybe a list of people in areas who could do research for you before you arrive.’
- Day trips
- Importance of flexibility in group tour
  ‘I like the idea of flexibility in schedules so that individuals can still have an opportunity to visit places (i.e. cemeteries, ancestor homes, etc) of their choosing.’
- Show some suggested **itineraries for those who travel independently**
  ‘Suggest 3 or 4 or 5 day trips, stringing together sample itineraries, and stopping places for the night.’
- Show **virtual tours**
  ‘I personally would like to see video of various locations, scenic and maybe towns and parishes, to give people an idea of what they would see when they arrive to search their roots.’

**Promoting other activities**
- Alternative activities for other family members
  ‘I was trying to balance seeing the sights with doing research in order not to bore my husband to death!!’
  ‘Knowing that this trip couldn’t be just about genealogy I also looked at what might be of particular interest to my husband.’
Opportunities for improvements (2)

**Promoting VisitScotland’s ability to facilitate varied and detailed tourism advice**

- A one-stop site with links to the places, history, museums, kirks etc.
  ‘There could be a link to TripAdvisor for restaurants etc.’
  ‘We contacted VisitScotland and were sent some tourist info which was also very helpful in terms of hotels/B&Bs in various locations.’
- Links to how to get around once in Scotland
  ‘Links on getting around once there, car rentals, train schedule links, ferry schedule links.’
- Highlight accommodation and other providers who offer support in genealogy research
  ‘Identify genealogy-friendly B&Bs/hotels so that potential visitors can take that into consideration when making bookings.’

**Promote access to record offices and family history centres**

- Raise awareness of what support is available when in Scotland
  ‘Apparently at the archives we could have had help and looked though records books which were not in the data base yet.’
- Raise awareness that an advance appointment has to be made prior to visiting an archive – and how an appointment can be made
  ‘Having more access to the archive in Edinburgh may have helped. I wasn’t aware of how far in advance you needed to make an appointment.’
  ‘Or possibly an online appointment that I could have made in advance of the time I was going to be there.’
Opportunities for improvements (3)

Maximising time in Scotland

- **Researching online** at ScotlandsPeople offices
  - It’s *cheaper than research online at home*, pay a flat fee per day
  - ScotlandsPeople employees offer **advice** on how to **research more effectively**
  - Make sure the experience of researching online from home mirrors the one at Scotlands People
- **Encourage travellers** to visit **areas where their ancestors are from**

Developing historical sites where possible

- ‘30 years ago Culloden was just a big field with a hut. Now it is a first class, historical site.’

Identifying the best time to visit

- **Weather, time, costs**
  ‘Is it better to do ancestral sleuthing in less touristy months? Does the availability/cost of accommodation vary with the time of year? Does the availability of local genealogy groups vary by time of year?’

Honesty I think Scotland has made great strides to support all the researchers who visit.