

SCOTTISH VISITOR ATTRACTION BAROMETER

JUNE 2024 EDITION

24 / 23

CONTENTS

Scotland - Overview.....	3
Executive Summary.....	4
Highlights.....	6
Notes - 2023.....	22
Notes - 2022.....	23

Graphics

Admissions Policy Overview.....	7
Performance by Former VisitScotland Region.....	8
Performance by Regional Economic Partnerships.....	9
Performance by Attraction Category.....	10
Performance by Location Accessibility & Density.....	11
Performance by Geographical Location.....	12
Performance by Council Area.....	13
Currency - Overview.....	18
Airport Passenger - Overview.....	19
Weather - Overview.....	21

Tables

Performance by Former VisitScotland Region.....	14
Performance by Regional Economic Partnerships.....	14
Performance by Former Attraction Category.....	15
Performance by Admission Charges.....	15
Performance by Volume of Visits.....	16
Performance by Location/Density.....	16
Performance by Geographical Location.....	16
Performance by Council Area.....	17



SCOTLAND OVERVIEW

586

Comparable
Attractions

June 2024/2023

Welcome to the Moffat Centre Scottish Visitor Attraction Barometer. The Barometer continues to review visitor attraction performance throughout Scotland, highlighting trends across various industry sectors and categories as attraction operators requested.

This Barometer compares the period of June 2024 and June 2023. Some 594 attraction operators provided figures for June 2024 with 586 attractions providing comparable visits figures. The total number of visits for the responding 586 barometer attractions in Scotland for June 2024 was 5,054,759. Compared to data from the previous year of 4,991,940 visits, this shows a visit increase of 1.3%.



1.3%

National visits compared to June 2023

5,054,759

Total Visits in June 2024



6.9%

National visits year to date vs. 2023

21,200,526

Total Visits in 2024 to date



Moffat Centre

EXECUTIVE SUMMARY

The June 2024 Scottish Visitor Attraction Barometer continued to show growth in visitor numbers to attractions in Scotland compared to the same period in 2023. Scotland's visitor attractions saw a 1.3% increase in visitors in June 2024 compared to the same time in 2023.

Accessible Small Towns saw a significant increase in visits compared to June 2023, and the West Lothian Local Authority area (reporting 3+ attractions) saw a 65.9% increase, compared to June 2023. Looking at specific sectors, the Heritage Centre (42.3%) and Historic Houses/Palaces (28.6%) attraction categories continued to record the most substantial visitor growth. Attractions in the Transport-Related Attractions category showed a 19.1% decrease in visits compared to the same period in 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to June 2024 is 2.0%. The inflation rate for June 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.9%. Inflation rates for restaurants and cafes were 6.2% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -3.6% in June, however, compared to the 8.8% increase in June 2023 this was disappointing growth in total sales. Total food sales decreased by -1.1% compared to the monthly performance of June 2023, when they had increased by 15.8%.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the May 2024 survey). The survey recorded 44% of respondents (a 2% decrease on the May 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".



EXECUTIVE SUMMARY

Despite consumer concern about the state of the economy, 55% of UK adults intended to take a domestic overnight trip in the third quarter of 2024 and 77% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (74%). However, the key three barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather and Personal finances. The figures above have been consistent across the last five waves of the GB National Tourist Survey (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation stalled in June 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw no increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.

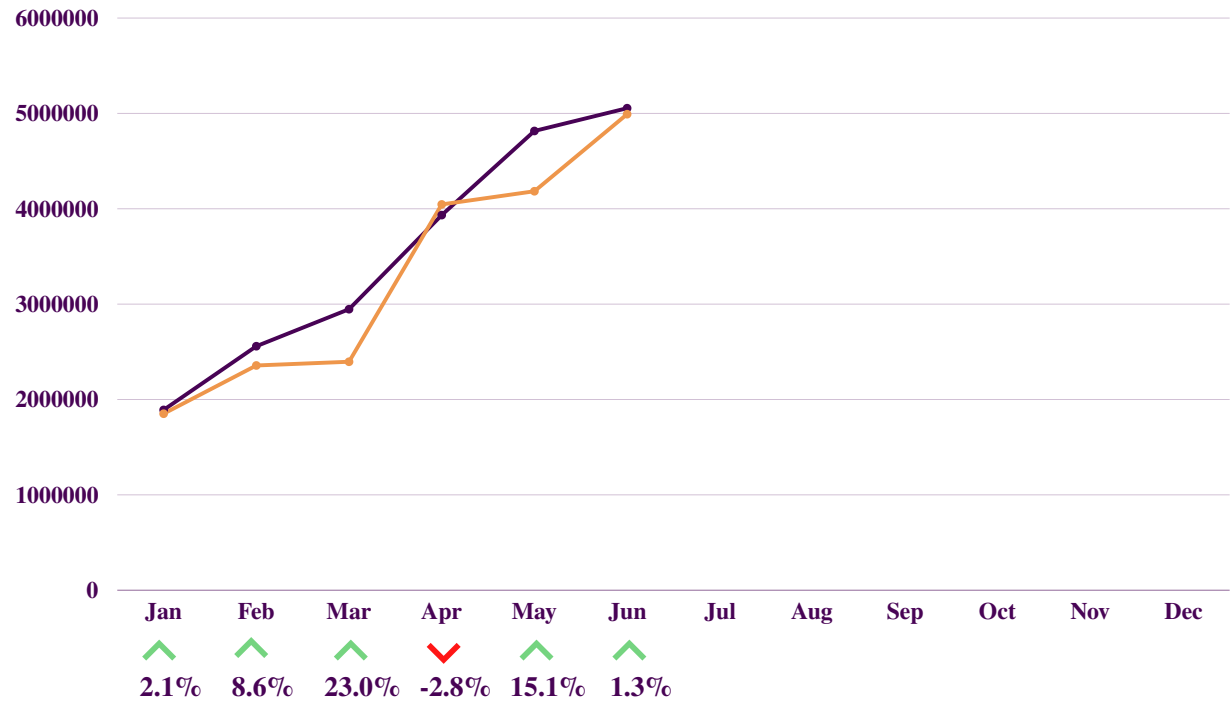
Prof J John Lennon
Director of Moffat Centre
Dean, Glasgow School for Business and Society
Glasgow Caledonian University



HIGHLIGHTS

Monthly Comparison

2024 2023



The largest percentage increase in visits recorded by former VisitScotland Regions for June 2024 was experienced by visitor attractions in the Angus & City of Dundee Region.

The largest percentage decrease in visits recorded by former VisitScotland Regions for June 2024 was experienced by visitor attractions in the Ayrshire & Arran Region.

The most significant percentage increase in visits recorded by former VisitScotland Regions when comparing January - June 2024 with the same period in 2023 was experienced by visitor attractions in the Shetland Islands Region.

During this period the largest percentage increase in visits was recorded by attractions in the Heritage Centre category.

The greatest percentage decrease in visits was recorded by attractions in the Transport-Related Attractions category compared to June 2023.

Attractions welcoming up to 4,999 visits per year experienced the largest increase when comparing June 2024 with June 2023.

Attractions in Accessible Small Towns saw the most significant increase when comparing June 2024 with June 2023.

The most significant percentage increase in visits by Council Area (reporting 3+ attractions) was experienced by attractions in the West Lothian Area followed by the Angus Area. Visitor Attractions in the South Ayrshire Area experienced the most significant percentage decrease in visits when comparing June 2024 with June 2023.

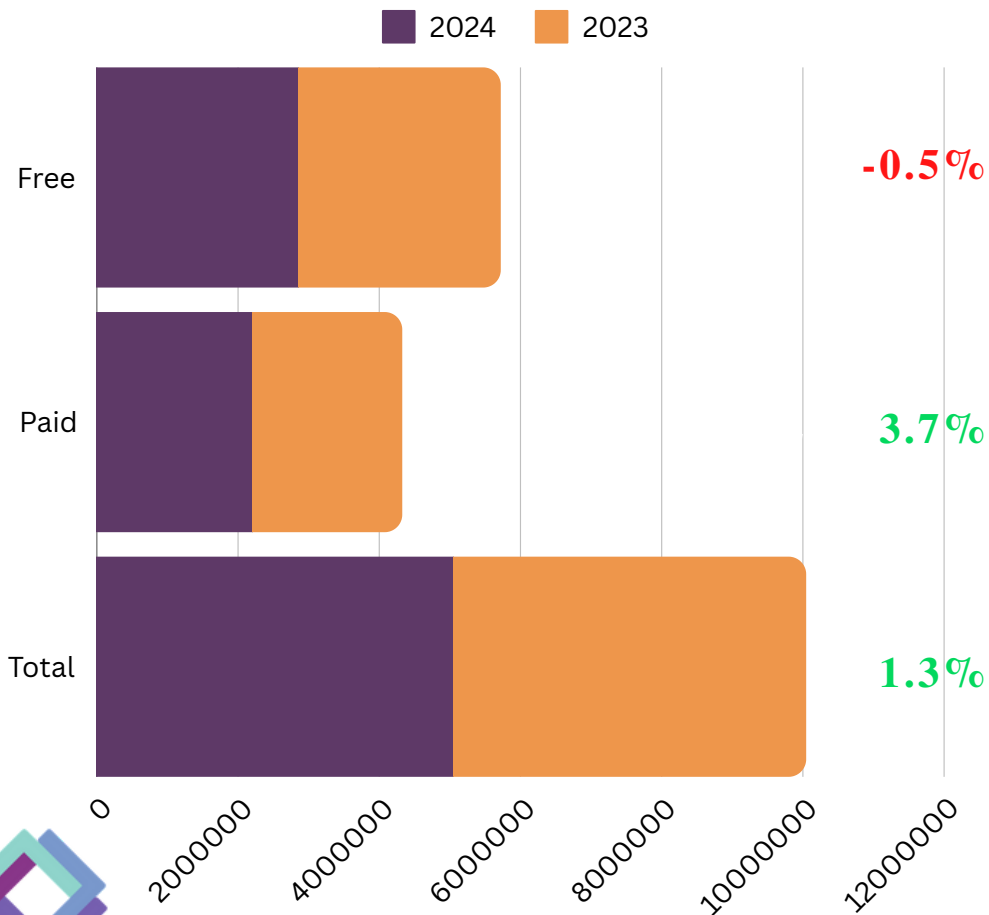


ADMISSIONS

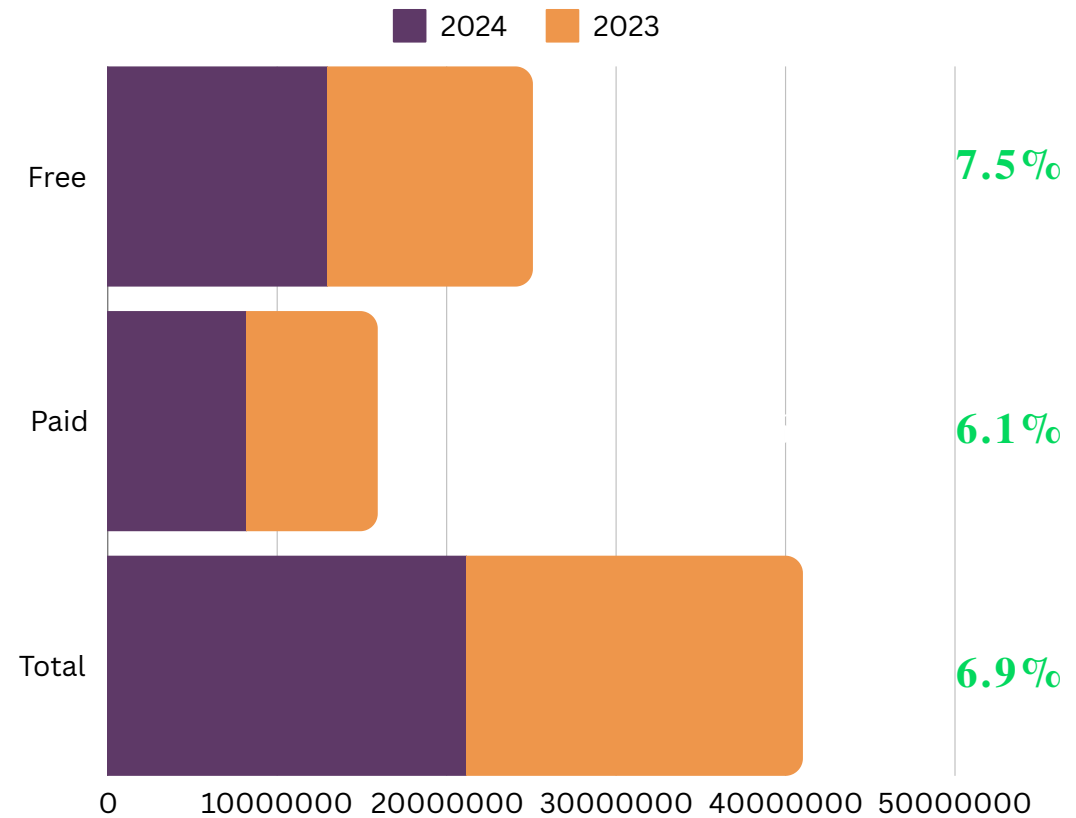
Policy Overview

2024 2023

June 2024 vs. June 2023 Comparison



Year to Date 24 vs. 23 Comparison

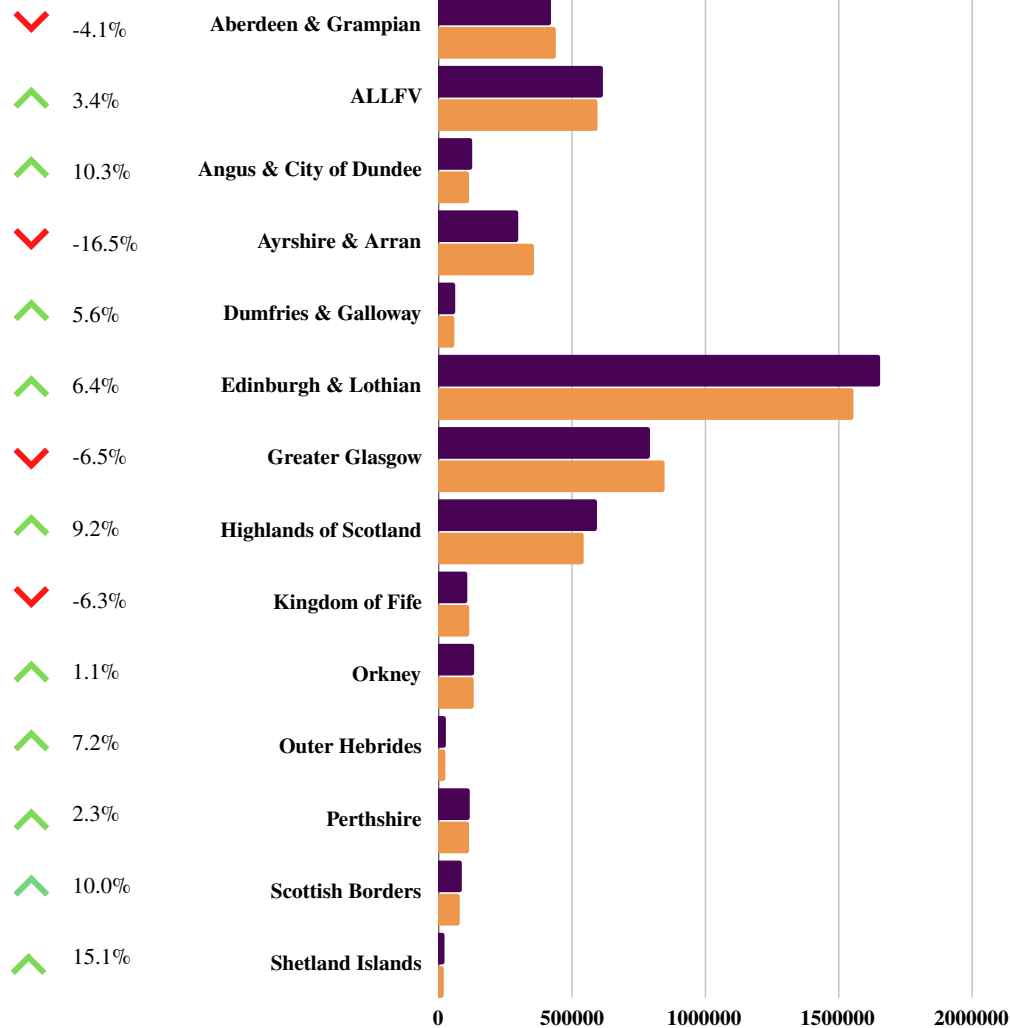




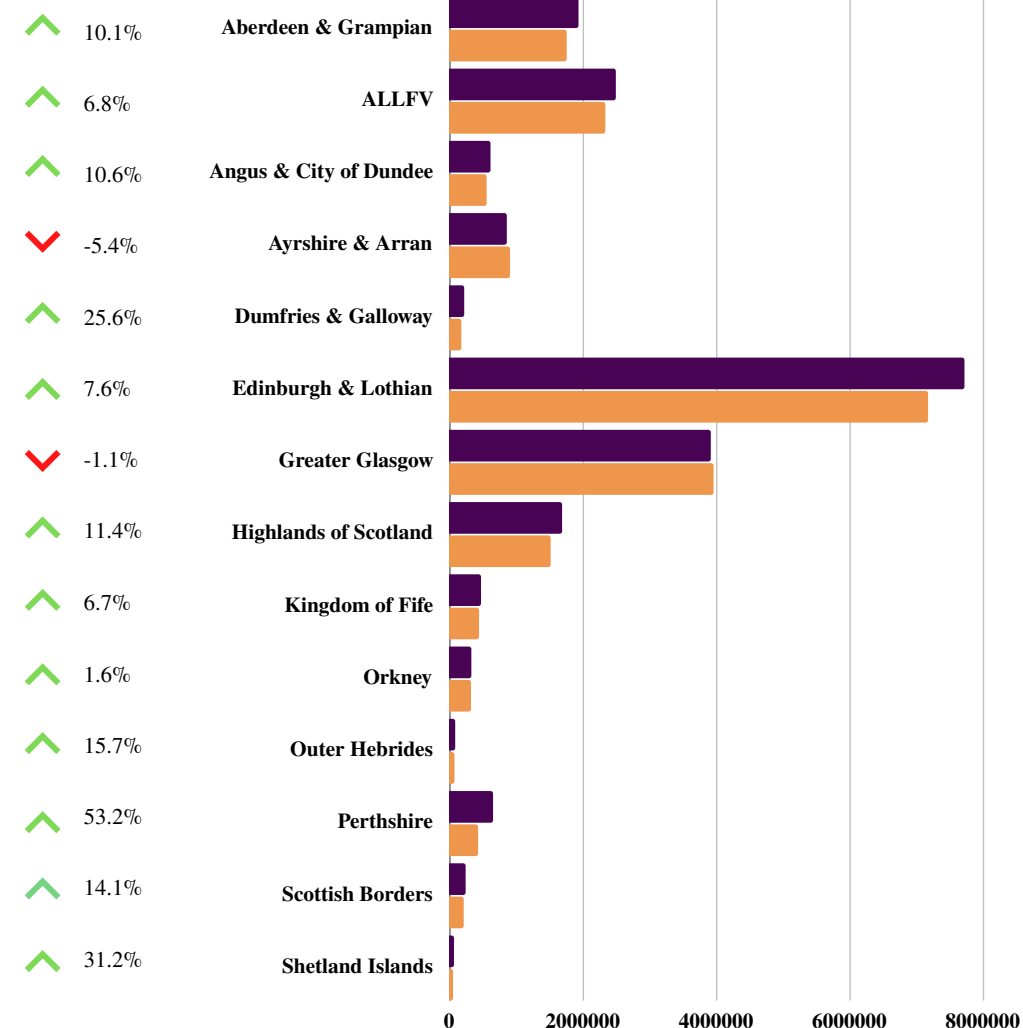
PERFORMANCE

By Former Visit Scotland Area

2024 June (vs. 2023)



2024 Year to Date (vs. 2023)





2024

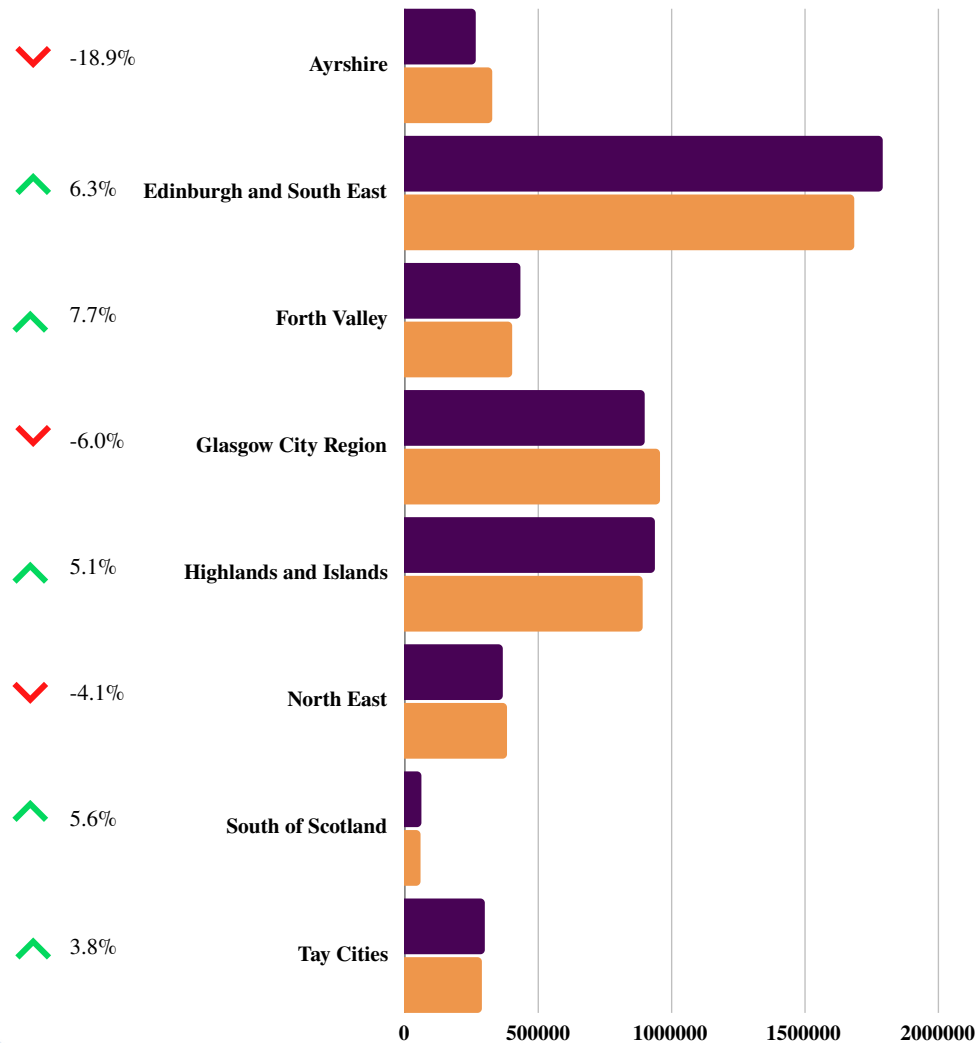


2023

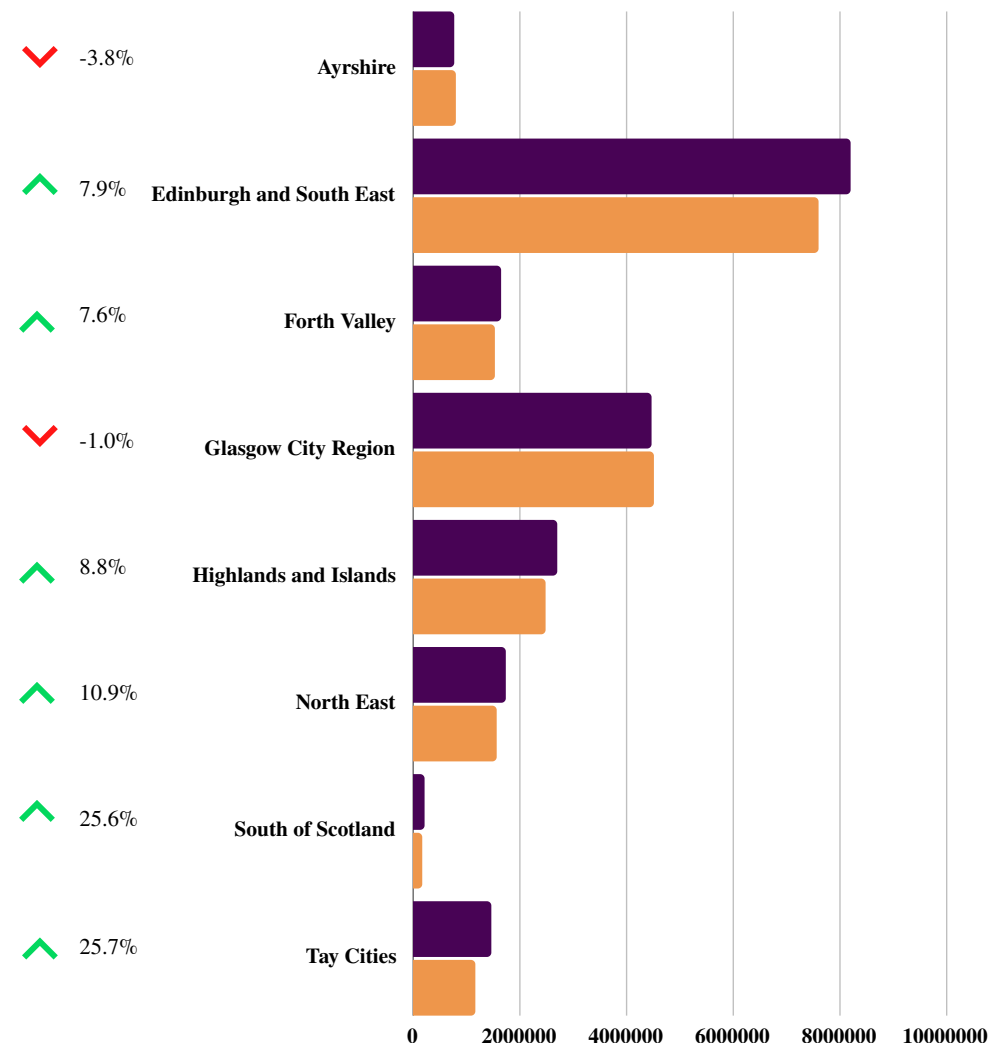
PERFORMANCE

By Regional Economic Partnerships

2024 June (vs. 2023)



2024 Year to Date (vs. 2023)

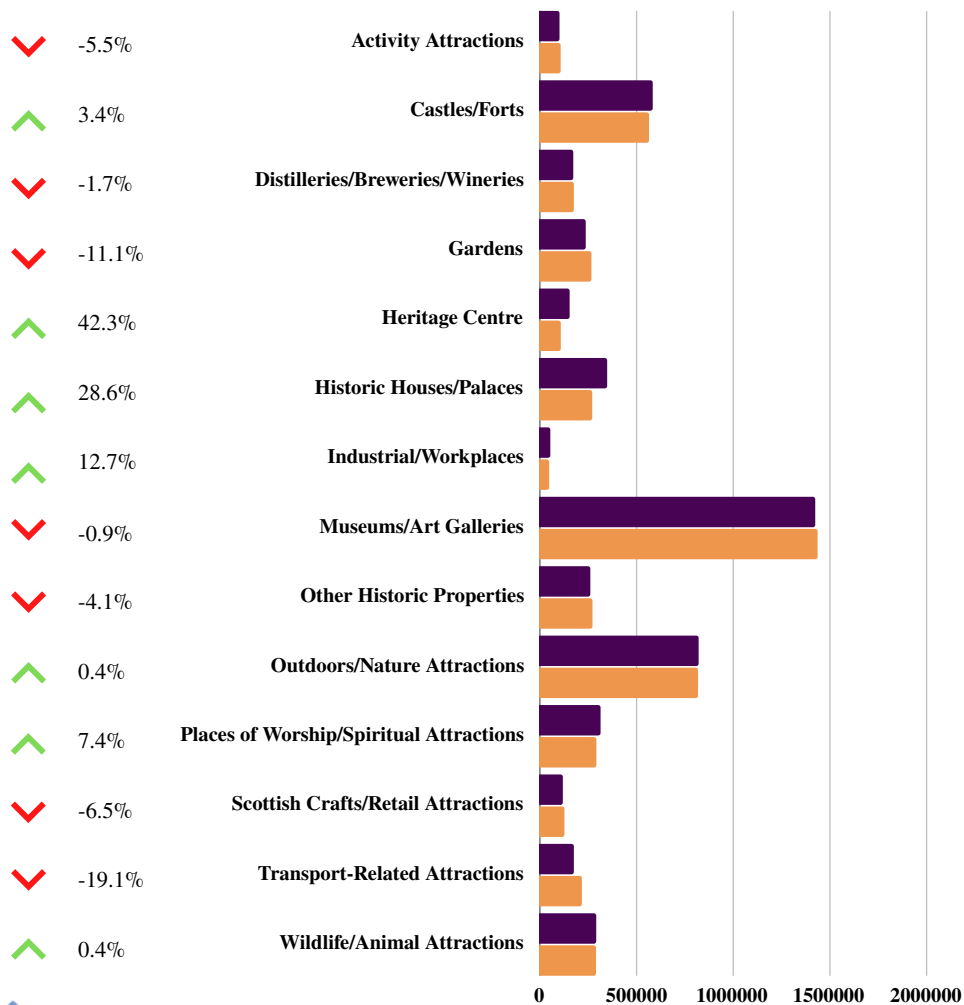




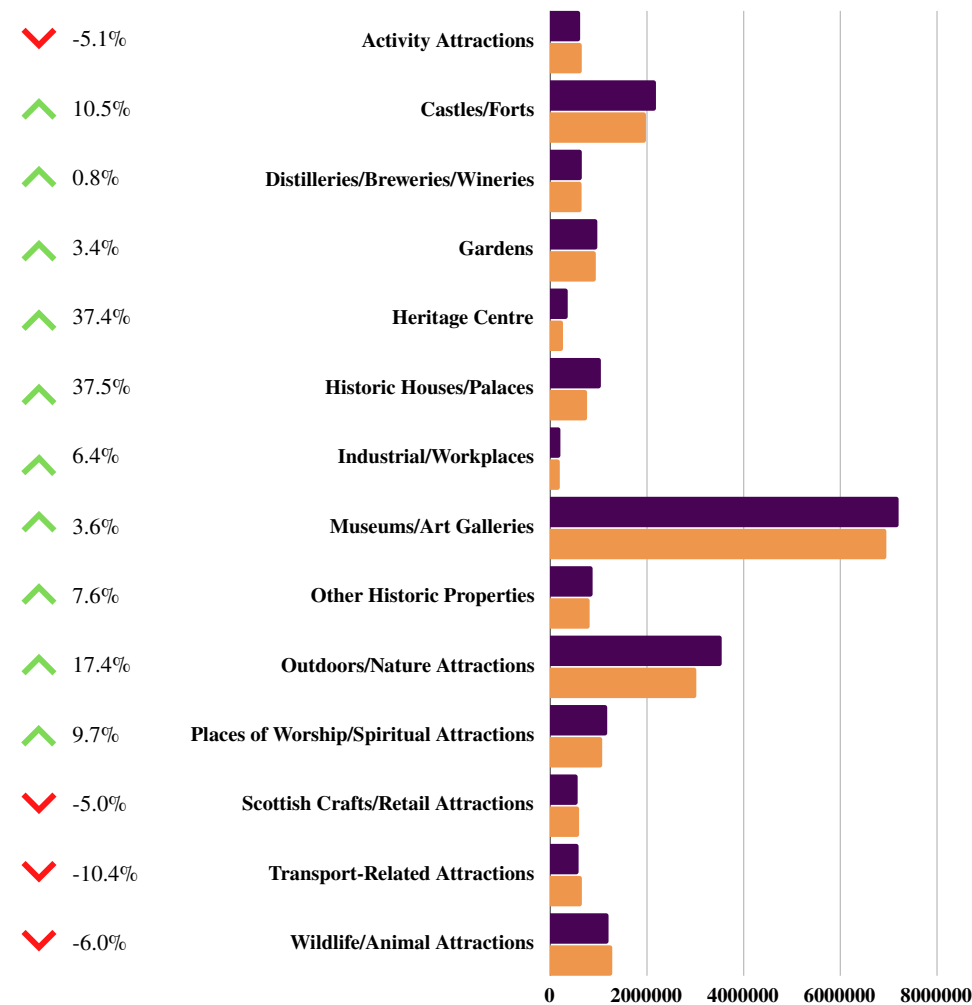
PERFORMANCE

By Attraction Category

2024 June (vs. 2023)



2024 Year to Date (vs. 2023)





PERFORMANCE

By Location Accessibility & Density

2024 June (vs. 2023)

-1%

Accessible Rural

80%

Accessible Small Towns

-1%

Large Urban Areas

9%

Other Urban Areas

-10%

Remote Rural

26%

Remote Small Towns

2024 Year to Date (vs. 2023)

5%

Accessible Rural

77%

Accessible Small Towns

4%

Large Urban Areas

11%

Other Urban Areas

6%

Remote Rural

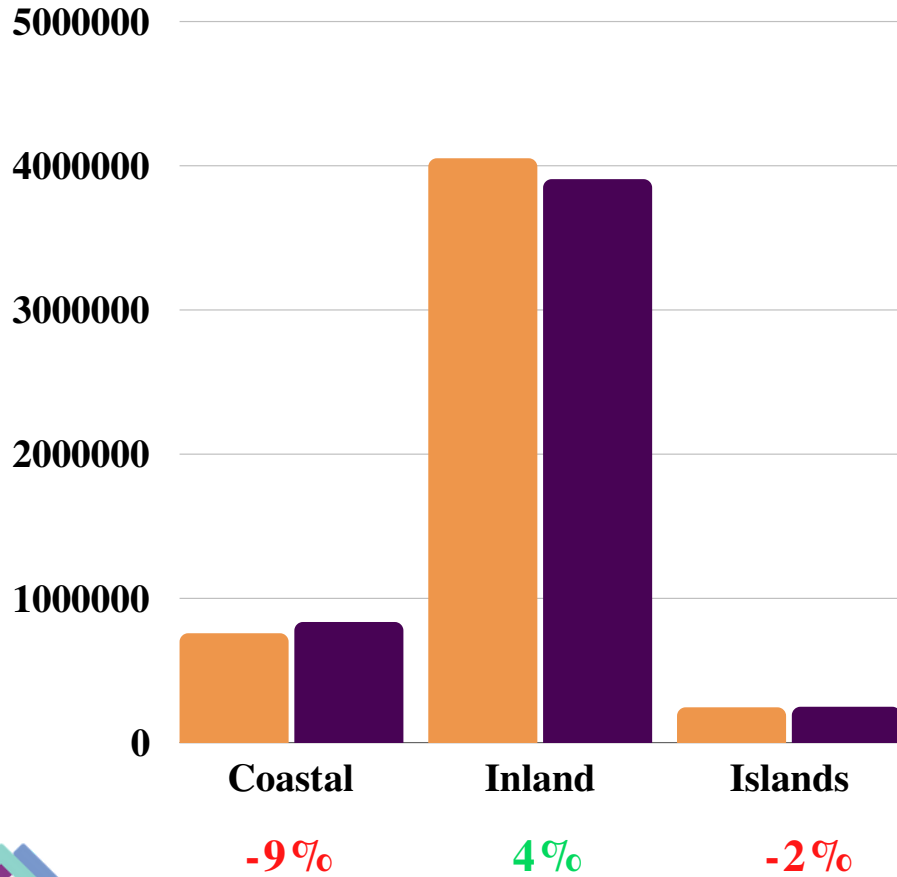
9%

Remote Small Towns

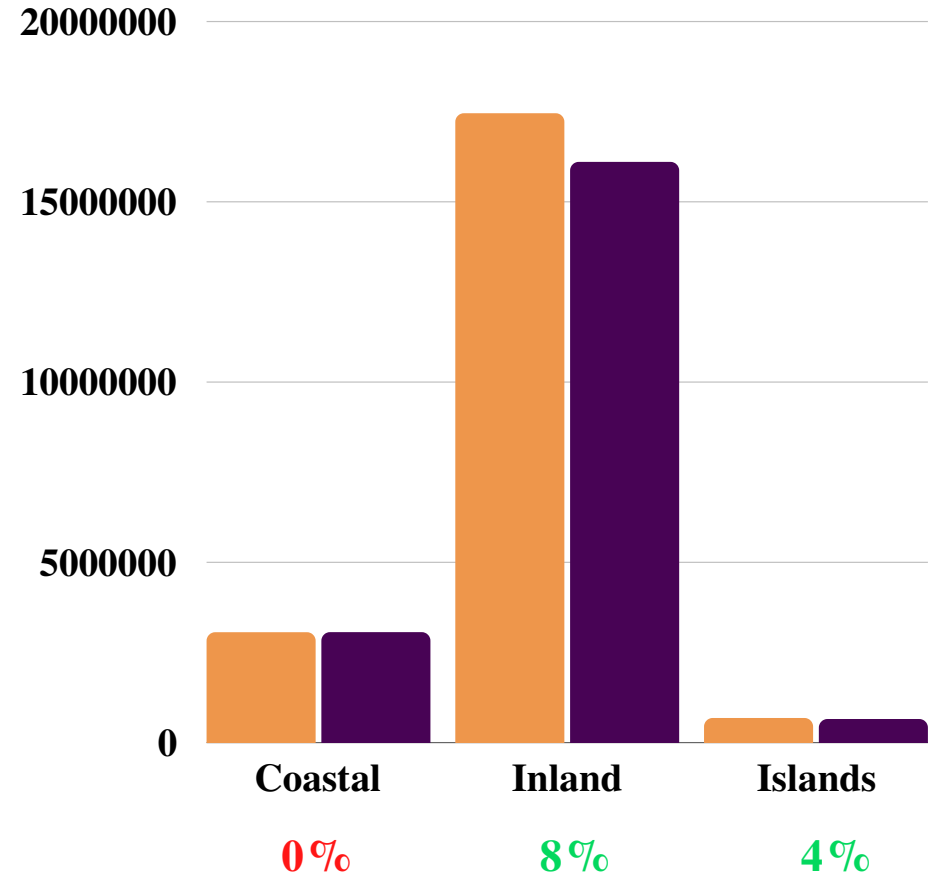
PERFORMANCE

By Geographic Location

2024 June (vs. 2023)



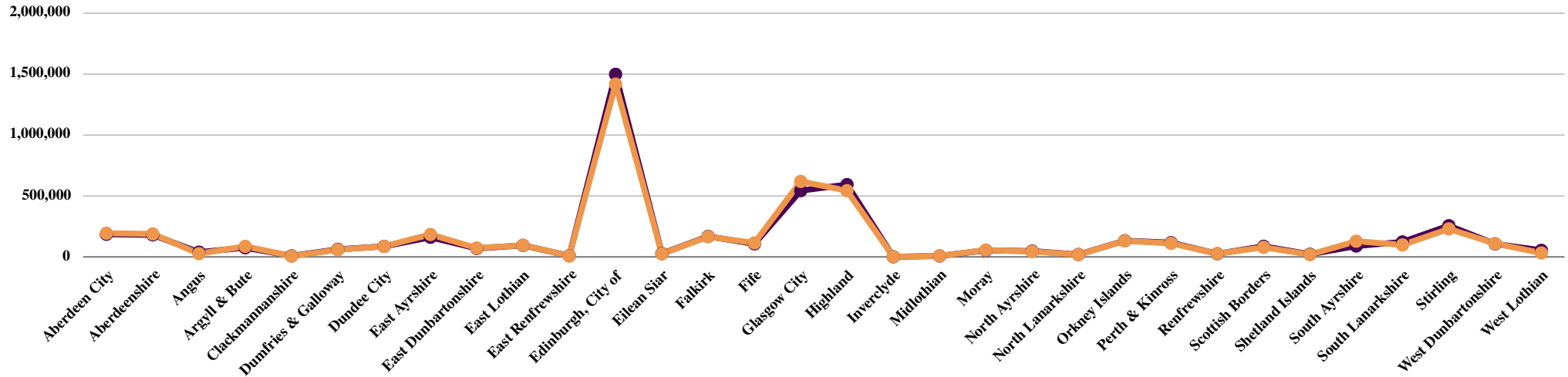
2024 Year to Date (vs. 2023)



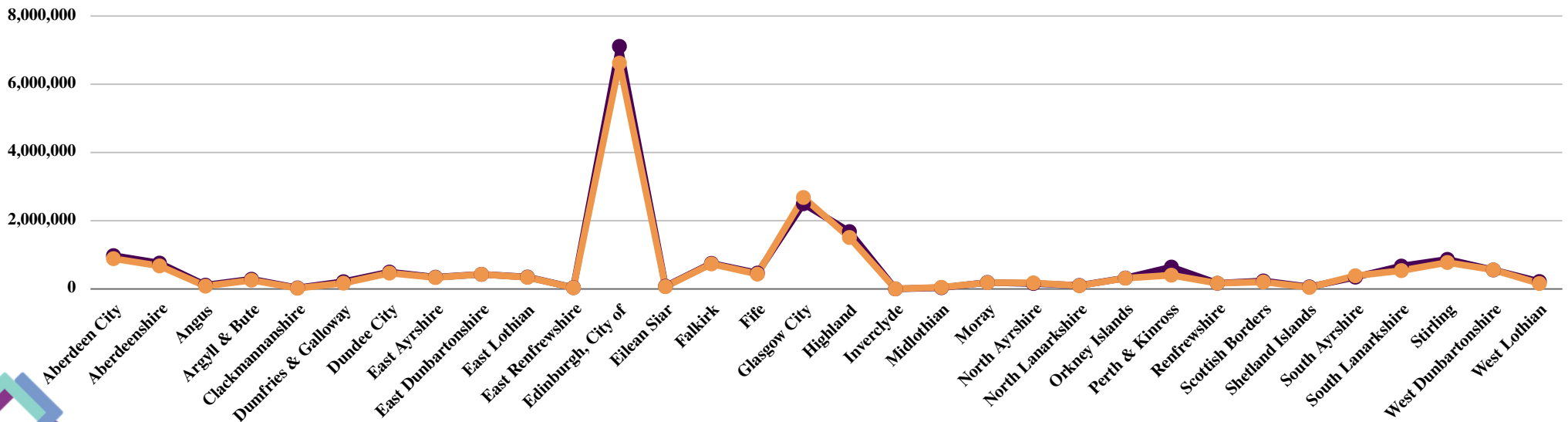
PERFORMANCE

By Council Area

2024 June (vs. 2023)



2024 Year to Date (vs. 2023)



PERFORMANCE

By Visit Scotland Area

2024 June (vs. 2023)

VSRegion Long	No of Attractions	2024	2023	% Change
Aberdeen & Grampian	80	420999	439045	-4.1%
ALLFV	76	615519	595475	3.4%
Angus & City of Dundee	30	125607	113838	10.3%
Ayrshire & Arran	25	298223	357037	-16.5%
Dumfries & Galloway	38	61923	58628	5.6%
Edinburgh & Lothian	84	1654798	1554769	6.4%
Greater Glasgow	53	792053	846803	-6.5%
Highlands of Scotland	60	593388	543507	9.2%
Kingdom of Fife	34	107252	114492	-6.3%
Orkney	23	132904	131406	1.1%
Outer Hebrides	12	26987	25176	7.2%
Perthshire	28	116470	113889	2.3%
Scottish Borders	31	86800	78910	10.0%

Year to Date 2024/2023

VSRegion Long	No of Attractions	2024	2023	% Change
Aberdeen & Grampian	80	1927419	1750659	10.1%
ALLFV	76	2487042	2329641	6.8%
Angus & City of Dundee	30	607903	549488	10.6%
Ayrshire & Arran	25	852188	900562	-5.4%
Dumfries & Galloway	38	213472	169949	25.6%
Edinburgh & Lothian	84	7714741	7169288	7.6%
Greater Glasgow	53	3910795	3952829	-1.1%
Highlands of Scotland	60	1681337	1509567	11.4%
Kingdom of Fife	34	465402	436162	6.7%
Orkney	23	320617	315423	1.6%
Outer Hebrides	12	78357	67703	15.7%
Perthshire	28	646053	421663	53.2%
Scottish Borders	31	234723	205790	14.1%
Shetland Islands	12	60477	46108	31.2%

By Regional Economic Partnerships

2024 June (vs. 2023)

Sgrep	No of Attractions	2024	2023	% Change
Ayrshire	20	265631	327431	-18.9%
Edinburgh and South East	130	1791327	1684592	6.3%
Forth Valley	35	433075	402159	7.7%
Glasgow City Region	59	898966	956364	-6.0%
Highlands and Islands	174	937196	891355	5.1%
North East	54	367041	382811	-4.1%
South of Scotland	38	61923	58628	5.6%
Tay Cities	76	299600	288600	3.8%

Year to Date 2024/2023

Sgrep	No of Attractions	2024	2023	% Change
Ayrshire	20	769588	800014	-3.8%
Edinburgh and South East	130	8199214	7598643	7.9%
Forth Valley	35	1648283	1531335	7.6%
Glasgow City Region	59	4468153	4512342	-1.0%
Highlands and Islands	174	2700678	2481804	8.8%
North East	54	1736111	1565385	10.9%
South of Scotland	38	213472	169949	25.6%
Tay Cities	76	1465027	1165360	25.7%

PERFORMANCE

By Attraction Category

2024 June (vs. 2023)

Category Long	No of Attractions	2024	2023	% Change
Activity Attractions	12	101386	107253	-5.5%
Castles/Forts	54	583530	564331	3.4%
Distilleries/Breweries/Wineries	55	172580	175516	-1.7%
Gardens	26	236992	266443	-11.1%
Heritage Centre	20	153767	108085	42.3%
Historic Houses/Palaces	43	347851	270436	28.6%
Industrial/Workplaces	9	53867	47807	12.7%
Museums/Art Galleries	222	1423985	1436283	-0.9%
Other Historic Properties	56	260761	271829	-4.1%
Outdoors/Nature Attractions	40	820891	817849	0.4%
Places of Worship/Spiritual Attractions	15	313679	292095	7.4%
Scottish Crafts/Retail Attractions	4	118595	126883	-6.5%
Transport-Related Attractions	8	175597	217005	-19.1%
Wildlife/Animal Attractions	22	291278	290125	0.4%

Year to Date 2024/2023

Category Long	No of Attractions	2024	2023	% Change
Activity Attractions	12	617313	650611	-5.1%
Castles/Forts	54	2185471	1978567	10.5%
Distilleries/Breweries/Wineries	55	651581	646480	0.8%
Gardens	26	972637	941107	3.4%
Heritage Centre	20	360230	262219	37.4%
Historic Houses/Palaces	43	1046007	760658	37.5%
Industrial/Workplaces	9	208784	196186	6.4%
Museums/Art Galleries	222	7205578	6951914	3.6%
Other Historic Properties	56	874982	813412	7.6%
Outdoors/Nature Attractions	40	3545371	3020503	17.4%
Places of Worship/Spiritual Attractions	15	1177286	1073437	9.7%
Scottish Crafts/Retail Attractions	4	565648	595397	-5.0%
Transport-Related Attractions	8	584962	652717	-10.4%
Wildlife/Animal Attractions	22	1204676	1281624	-6.0%

By Admission Charges

2024 June (vs. 2023)

Admission	No of Attractions	2024	2023	% Change
Free	259	2853016	2868032	-0.5%
Paid	327	2201743	2123908	3.7%
Total	586	5054759	4991940	1.3%

Year to Date 2024/2023

Admission	No of Attractions	2024	2023	% Change
Free	259	12996470	12094843	7.5%
Paid	327	8204056	7729989	6.1%
Total	586	21200526	19824832	6.9%

PERFORMANCE

By Volume of Visits

2024 June (vs. 2023)

VolumeVisits	No of Attractions	2024	2023	% Change
0 - 4,999	161	56744	41941	35.3%
5,000 - 9,999	79	79372	58898	34.8%
10,000 - 19,999	75	128508	123758	3.8%
20,000 - 49,999	106	448368	383575	16.9%
50,000 - 99,999	69	567413	549786	3.2%
100,000 +	95	3772610	3831799	-1.5%

Year to Date 2024/2023

VolumeVisits	No of Attractions	2024	2023	% Change
0 - 4,999	161	161401	113818	41.8%
5,000 - 9,999	79	249520	197742	26.2%
10,000 - 19,999	75	432750	396896	9.0%
20,000 - 49,999	106	1612938	1359840	18.6%
50,000 - 99,999	69	2058039	1865073	10.3%
100,000 +	95	16681653	15886578	5.0%

By Location/Density

2024 June (vs. 2023)

UrbanRural	No of Attractions	2024	2023	% Change
Accessible Rural	119	696049	704874	-1.3%
Accessible Small Towns	40	104867	58279	79.9%
Large Urban Areas	114	2372307	2385201	-0.5%
Other Urban Areas	103	1040463	952816	9.2%
Remote Rural	171	700648	778956	-10.1%
Remote Small Towns	39	140425	111814	25.6%

Year to Date 2024/2023

UrbanRural	No of Attractions	2024	2023	% Change
Accessible Rural	119	2636699	2506695	5.2%
Accessible Small Towns	40	610313	344745	77.0%
Large Urban Areas	114	11288005	10860720	3.9%
Other Urban Areas	103	3957940	3560120	11.2%
Remote Rural	171	2368912	2242550	5.6%
Remote Small Towns	39	338657	310002	9.2%

By Geographic Area

2024 June (vs. 2023)

Location	No of Attractions	2024	2023	% Change
Coastal	156	758253	836281	-9.3%
Inland	357	4051900	3907123	3.7%
Islands	73	244606	248536	-1.6%

Year to Date 2024/2023

Location	No of Attractions	2024	2023	% Change
Coastal	156	3061496	3063587	-0.1%
Inland	357	17456443	16107131	8.4%
Islands	73	682587	654114	4.4%

PERFORMANCE

By Council Area

2024 June (vs. 2023)

Council	No of Attractions	2024	2023	% Change
Aberdeen City	15	186018	194205	-4.2%
Aberdeenshire	39	181023	188606	-4.0%
Angus	17	38751	26685	45.2%
Argyll & Bute	36	75531	86461	-12.6%
Clackmannanshire	4	8549	6585	29.8%
Dumfries & Galloway	38	61923	58628	5.6%
Dundee City	12	86629	86914	-0.3%
East Ayrshire	6	161227	184159	-12.5%
East Dunbartonshire	3	69510	72523	-4.2%
East Lothian	19	94685	95614	-1.0%
East Renfrewshire	2	9173	9150	0.3%
Edinburgh, City of	53	1498671	1418288	5.7%
Eilean Siar	12	26987	25176	7.2%
Falkirk	11	168385	165889	1.5%
Fife	34	107252	114492	-6.3%
Glasgow City	27	543992	619325	-12.2%
Highland	60	593388	543507	9.2%
Inverclyde	2	913	1552	-41.2%
Midlothian	3	7754	8498	-8.8%
Moray	26	53958	56234	-4.0%
North Ayrshire	9	47615	44181	7.8%
North Lanarkshire	4	19831	19038	4.2%
Orkney Islands	23	132904	131406	1.1%
Perth & Kinross	28	116697	111422	4.7%
Renfrewshire	6	25778	26612	-3.1%
Scottish Borders	31	86800	78910	10.0%
Shetland Islands	12	21836	18965	15.1%
South Ayrshire	10	89381	128697	-30.5%
South Lanarkshire	9	122856	98603	24.6%
Stirling	20	256141	229685	11.5%
West Dunbartonshire	6	106913	109561	-2.4%
West Lothian	9	53688	32369	65.9%

2024 Year to Date (vs. 2023)

Council	No of Attractions	2024	2023	% Change
Aberdeen City	15	977443	889033	9.9%
Aberdeenshire	39	758668	676352	12.2%
Angus	17	111810	83781	33.5%
Argyll & Bute	36	285982	257181	11.2%
Clackmannanshire	4	30418	21199	43.5%
Dumfries & Galloway	38	213472	169949	25.6%
Dundee City	12	495457	465182	6.5%
East Ayrshire	6	344309	335306	2.7%
East Dunbartonshire	3	429798	428476	0.3%
East Lothian	19	349317	341566	2.3%
East Renfrewshire	2	39729	36988	7.4%
Edinburgh, City of	53	7109250	6618427	7.4%
Eilean Siar	12	78357	67703	15.7%
Falkirk	11	750408	734158	2.2%
Fife	34	465402	436162	6.7%
Glasgow City	27	2497888	2681354	-6.8%
Highland	60	1681337	1509567	11.4%
Inverclyde	2	2478	3738	-33.7%
Midlothian	3	37653	48582	-22.5%
Moray	26	191308	185274	3.3%
North Ayrshire	9	160604	178254	-9.9%
North Lanarkshire	4	103081	96677	6.6%
Orkney Islands	23	320617	315423	1.6%
Perth & Kinross	28	642108	403800	59.0%
Renfrewshire	6	166847	167607	-0.5%
Scottish Borders	31	234723	205790	14.1%
Shetland Islands	12	60477	46108	31.2%
South Ayrshire	10	347275	387002	-10.3%
South Lanarkshire	9	670974	537989	24.7%
Stirling	20	867457	775978	11.8%
West Dunbartonshire	6	557358	559513	-0.4%
West Lothian	9	218521	160713	36.0%

CURRENCY - OVERVIEW

Currency Trends

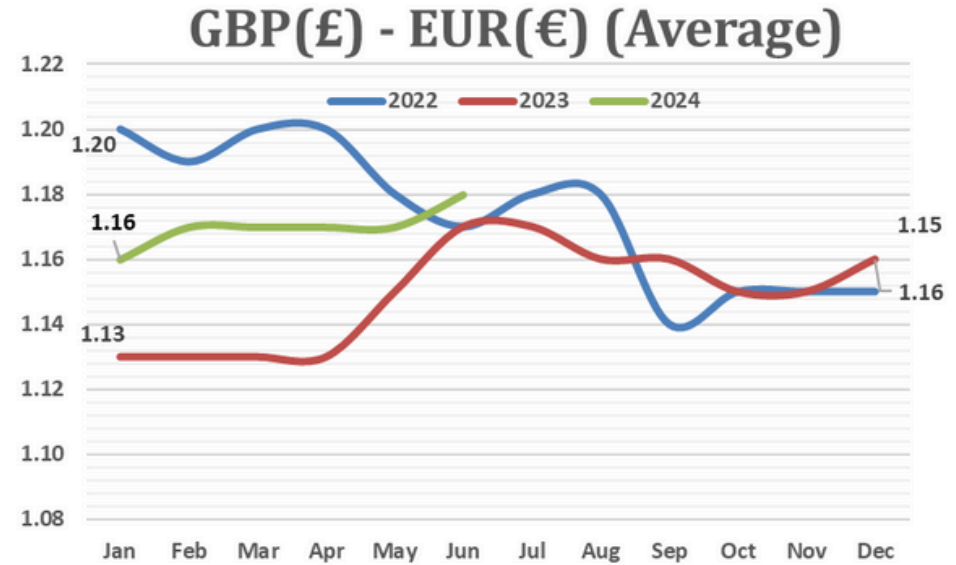


£ GBP to € EUR

June
2024 vs. 2023

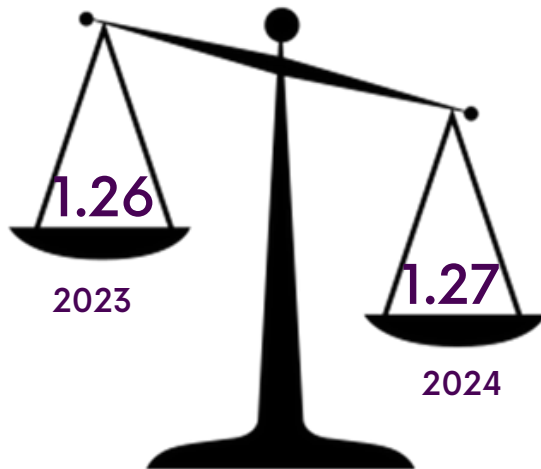


£ GBP to € EUR - 3 Year Average

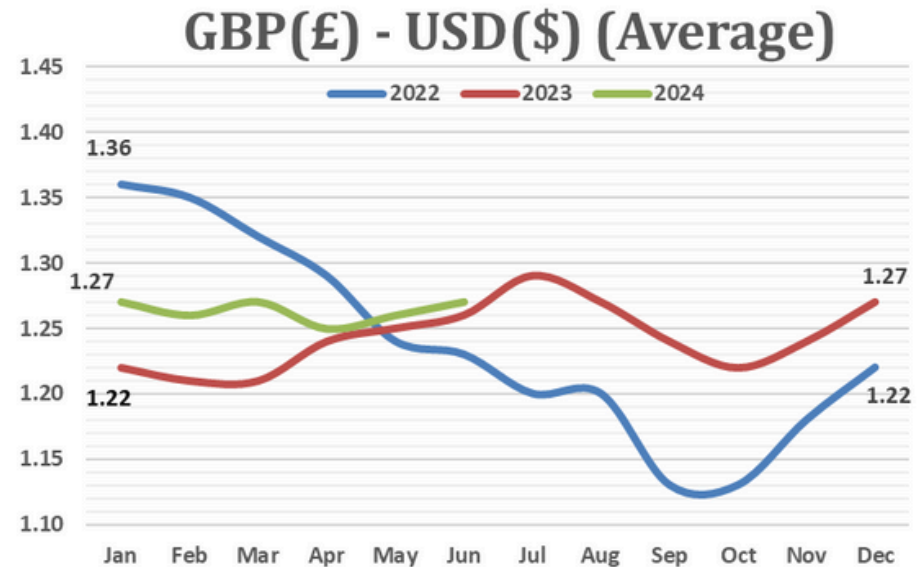


£ GBP to \$ USD

June
2024 vs. 2023



£ GBP to \$ USD - 3 Year Average



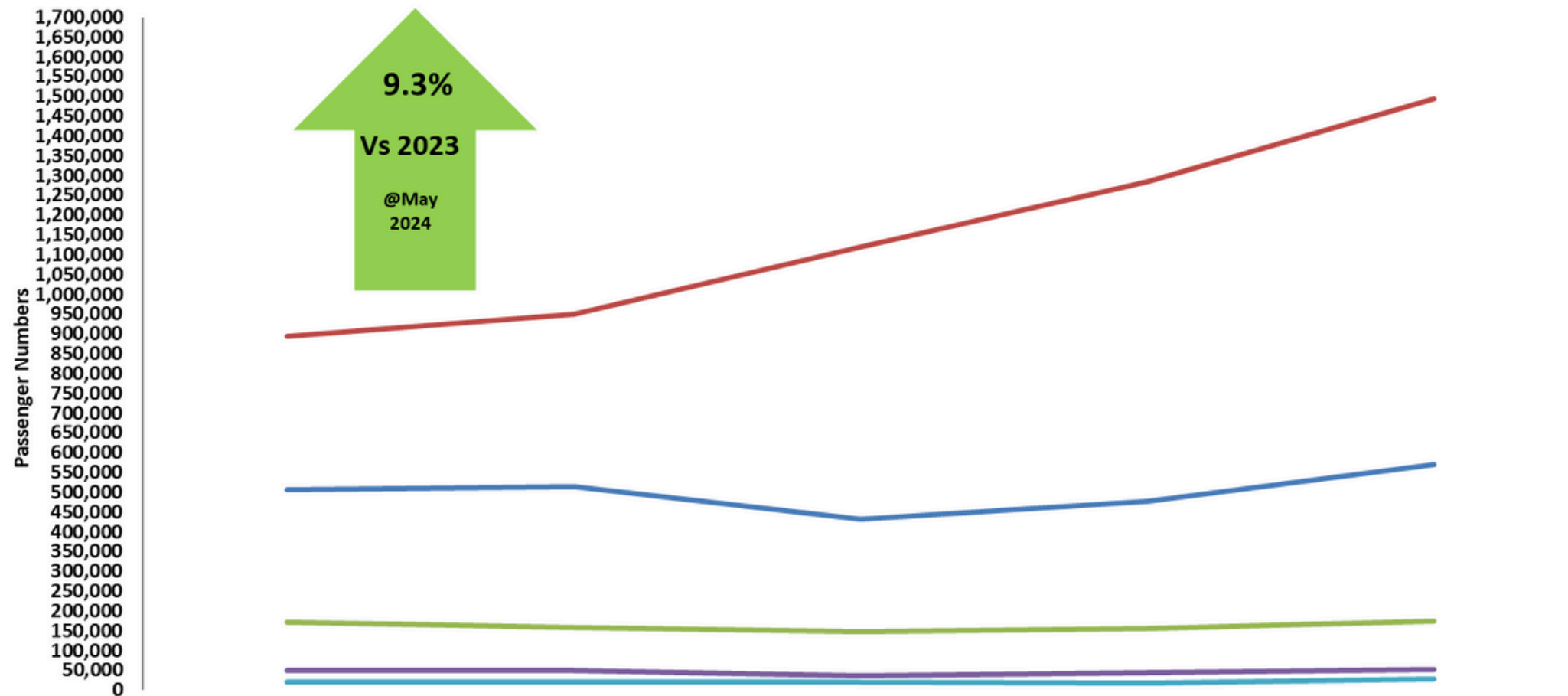
AIRPORT PASSENGER - OVERVIEW



Top Five Scottish Airports

Source: Civil Aviation Authority

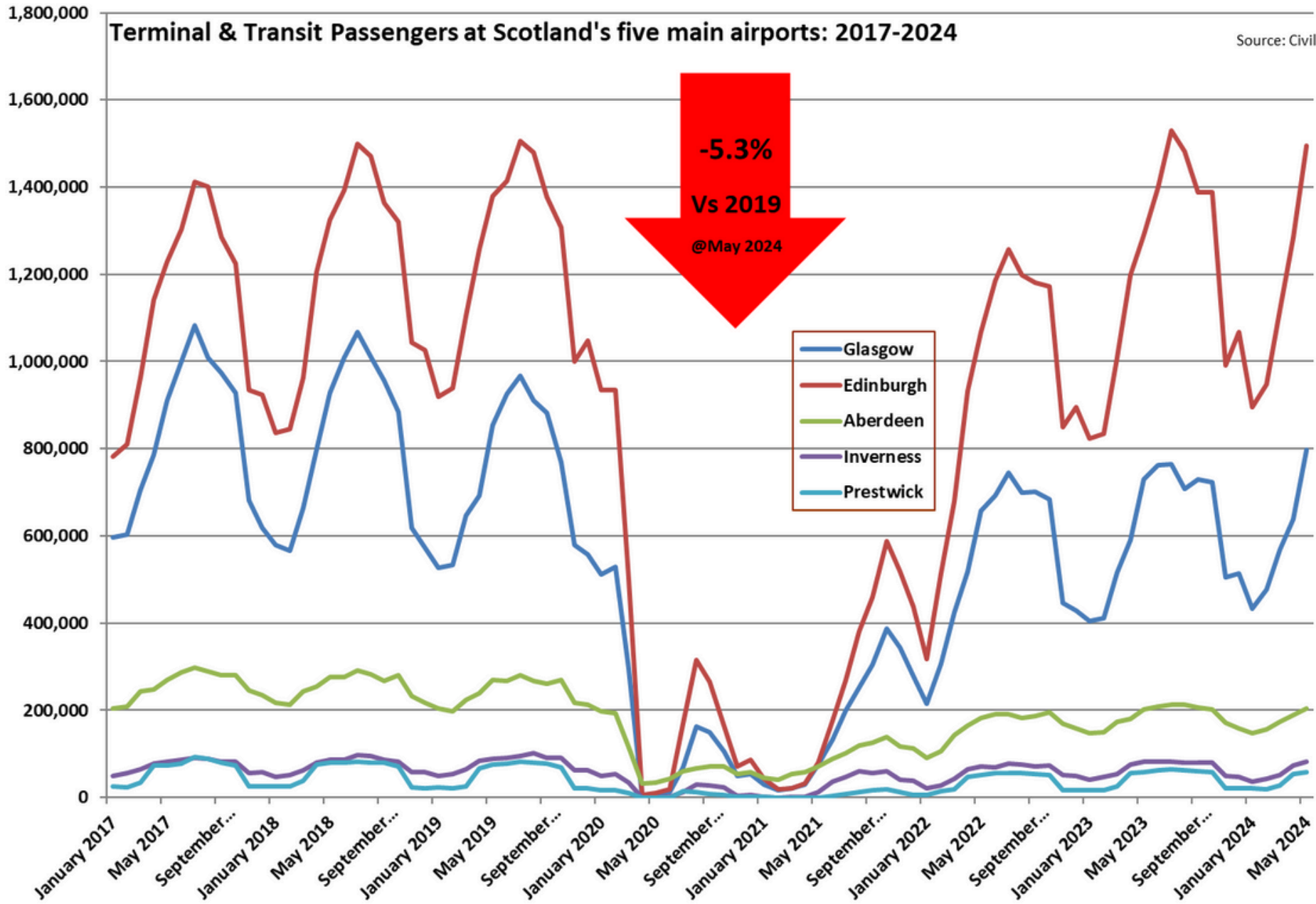
Terminal & Transit Passengers at Scotland's Five Main Airports



	January 2024	February 2024	March 2024	April 2024	May 2024
— Glasgow	505,896	513,234	432,447	475,854	568,517
— Edinburgh	894,763	948,005	1,118,057	1,283,382	1,494,105
— Aberdeen	172,545	158,504	147,266	156,482	174,666
— Inverness	49,932	48,200	37,209	43,964	51,219
— Prestwick	20,664	20,749	20,902	18,110	28,114



Top Five Scottish Airports



WEATHER: SCOTLAND - OVERVIEW

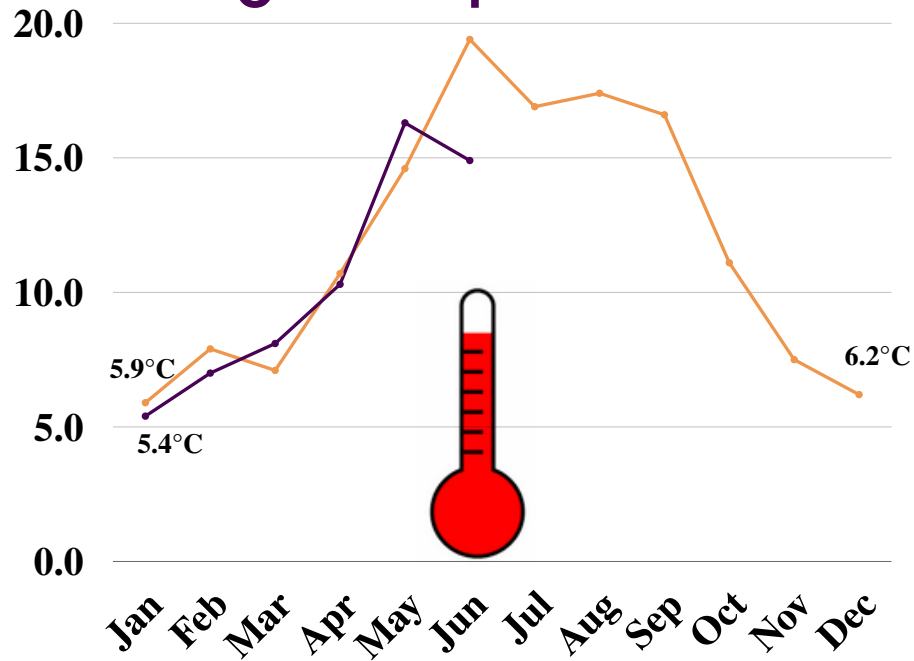


2024

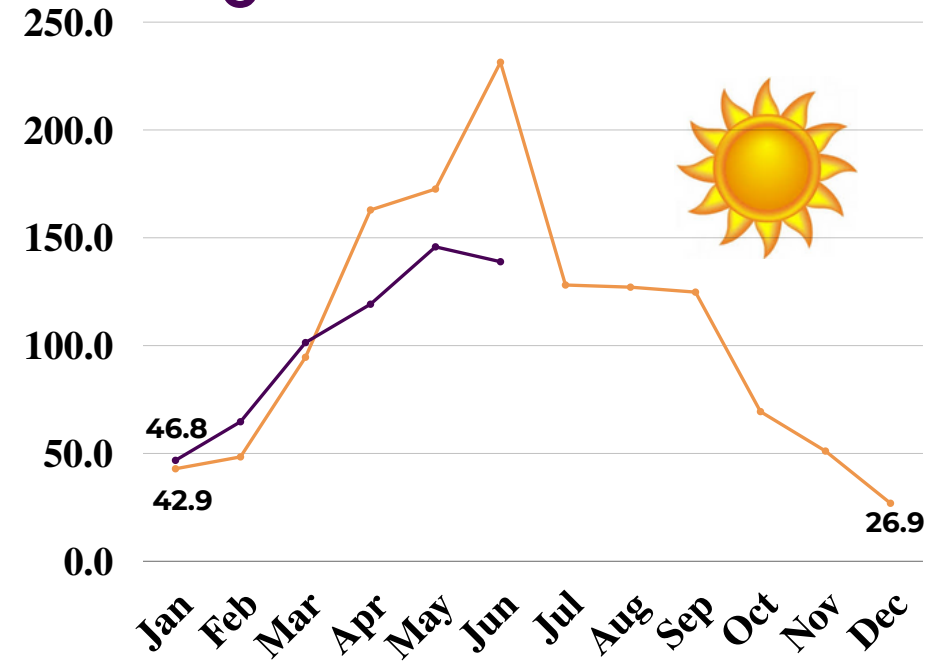


2023

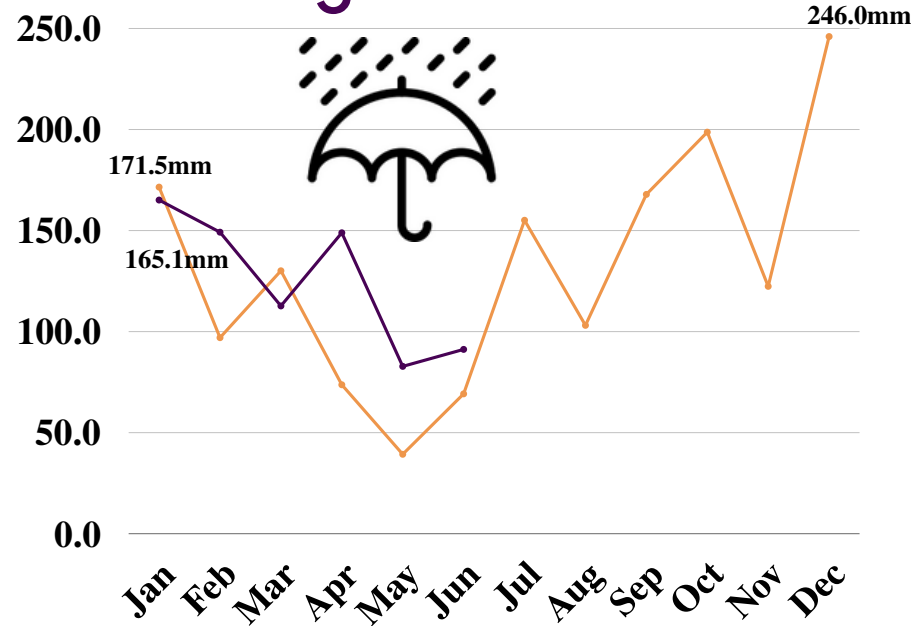
Average Temperature



Average Hours of Sunshine



Average Rainfall



NOTES - 2024

1. On Sunday 28th January 2024, a weather station in a Scottish village, Kinlochewe, in the north-west Highlands recorded 19.6°C.
2. On the 20th of February the Scottish Government launched the Gaelic Tourism Strategy for Scotland 2024-2029.
3. VisitScotland announced that the Quality Assurance (QA) scheme will end on the 31st of March 2025.
4. VisitScotland announced that all 25 information centres (iCentres) will be closed over the next two years, They will be closed via a phased closure programme by the 31st of March 2026.
5. Easter Weekend fell at the end of March (Good Friday was on the 29th).

NOTES - 2023

1. On the 28th of January Flybe, which operated scheduled services from Belfast City, Birmingham and Heathrow to airports across the United Kingdom and to Amsterdam and Geneva entered into administration.
2. The Scottish Government published 'Scotland's Marine Economic Statistics 2020' (<https://www.gov.scot/publications/scotlands-marine-economic-statistics-2020/>).
3. The 17th of February saw Storm Otto cause widespread damage throughout Scotland, especially in the Aberdeenshire area.
4. On the 29th of May Glasgow recorded 15.5 hours of sunshine, meaning, this was the sunniest location in the UK, on the 30th of May Tyndrum documented the highest temperature of the year to date at 24.5°C.
5. Scotland recorded its hottest June on record with the average temperature being 14.3°C, this was 2.7°C higher than average with parts of the Highlands recording a 3.5°C above average temperatures. (Met Office).
6. Banksy's 'Cut & Run' Exhibition took place at Glasgow's Gallery of Modern Art between the 18th of June and the 28th of August 2023, this was Banksy's first solo show in 14 years.
7. The 6th and 7th of October saw exceptional rainfall especially in Southern and Central Scotland along with the East coast. Rail services across Scotland were severely affected with many trains cancelled.
8. Storm Babet (18th - 21st of October) brought rainfall and strong winds (gusting up to 115mph in some areas) to parts of eastern Scotland with 150 to 200mm falling in the wettest areas and the Met Office issuing two red warnings for rain. For the county of Angus - coinciding with this red warning area - 19 October 2023 was, by a wide margin, the wettest day on record in a series from 1891. The main A90 trunk road was closed between Forfar and Brechin after storm Babet damaged a bridge.
9. Storm Debi (12th - 13th November) heavy rain warnings were issued for Aberdeenshire, Aberdeen, Angus and Moray. Network Scotland stated that speed limits were put in place due to the weather. Due to heavy flooding, the line between Dumfries and Sanquhar was closed.
10. December saw a further three storms impact Scotland; Storm Elin (9th) brought strong winds and heavy downpours to parts of the UK and Ireland. The warning covered Dumfries and Galloway, the Scottish Borders, Argyll and Bute, East Ayrshire, North Ayrshire, South Ayrshire and South Lanarkshire. Storm Fergus (10th) brought rain and hail to various areas in Scotland, key areas were Central, Tayside and Fife, Grampian, southwest Scotland, Lothian and Borders and North and South Lanarkshire areas. Storm Gerrit (27th-28th) brought widespread disruption across Scotland, with much of the country battered by snow, high winds and heavy rain.



www.moffatcentre.co.uk



[@moffat_centre](https://twitter.com/moffat_centre)

This report should be quoted as:

Moffat Centre (2024): Scottish Visitor Attraction Barometer Report: June 2024/2023, Glasgow School for Business and Society, Glasgow Caledonian University: Glasgow, UK. Unless explicitly stated otherwise, all rights including Intellectual Property Rights (IPS) and copyright of the content of this report are owned by Glasgow Caledonian University. Except as otherwise permitted under copyright law or Glasgow Caledonian University's Terms of Use, under no circumstances must this report be copied, reproduced, republished, posted online, broadcast, transmitted or disseminated in any way without first obtaining Glasgow Caledonian University's written permission. © Moffat Centre, Glasgow Caledonian University 2024