

SCOTTISH VISITOR ATTRACTION BAROMETER

AUGUST
2024 EDITION
24/23

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SCOTLAND OVERVIEW

593

Comparable
Attractions

August 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 August 2024 and August 2023. Some 599 attraction operators provided figures for August 2024 with 593 attractions providing comparable visits figures. The total number of visits for the responding 593 barometer attractions in Scotland for August 2024 was 6,250,562. Compared to data from the previous year of 6,347,561 visits, this shows a visit decrease of 1.5%.



1.5%

National visits compared to August 2023

6,250,562

Total Visits in August 2024



4.1%

National visits year to date vs. 2023

32,857,934

Total Visits in 2024 to date



EXECUTIVE SUMMARY

The August 2024 Scottish Visitor Attraction Barometer showed growth stalled in visitor numbers to attractions in Scotland compared to the same period in 2023. Scotland's visitor attractions saw a 1.5% decrease in visitors in August 2024 compared to the same time in 2023.

Other Urban Areas saw a significant increase in visits compared to August 2023, and the North Ayrshire Local Authority area (reporting 3+ attractions) saw a 23.5% increase, compared to August 2023. Looking at specific sectors, the Historic Houses/Palaces (15.0%) and Places of Heritage Centre (14.0%) attraction categories continued to record the most substantial visitor growth. Attractions in the Industrial/Workplaces category showed a 15.6% decrease in visits compared to the same period in 2023.

Data from the Met Office showed that Scotland experienced over one-and-a-half times its average August rainfall (162%). Over the Summer season, Scotland experienced 373.8mm of rainfall – 18% more than its average.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to August 2024 is 2.2%, unchanged from July. The inflation 12-month rate (%) for August 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.0%. Inflation rates for restaurants and cafes were 4.3% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in August, however, compared to the 5.6% increase in August 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of August 2023, when they had increased by 8.6%.

Domestic consumer sentiment provided by the GB National Tourist Boards for August 2024 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the July 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the July 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, 33% of UK adults intended to take a domestic overnight trip in the August to September sector of 2024 and 79% 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 three key 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 as mentioned earlier have been consistent across previously published GB National Tourist Surveys (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation grew in August 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 1% increase when compared to the same period in 2023, however, UK air connectivity saw a 5% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for August 2024 global air passenger demand, measured by revenue per kilometer, was up 8.6% compared to August 2023. International demand rose 10.6% over the same period with domestic demand increasing 5.6%. Asia-Pacific region was the biggest driver of international air passenger growth in August 2024 compared to Europe at 7.8%

Chris Greenwood

Senior Research Fellow

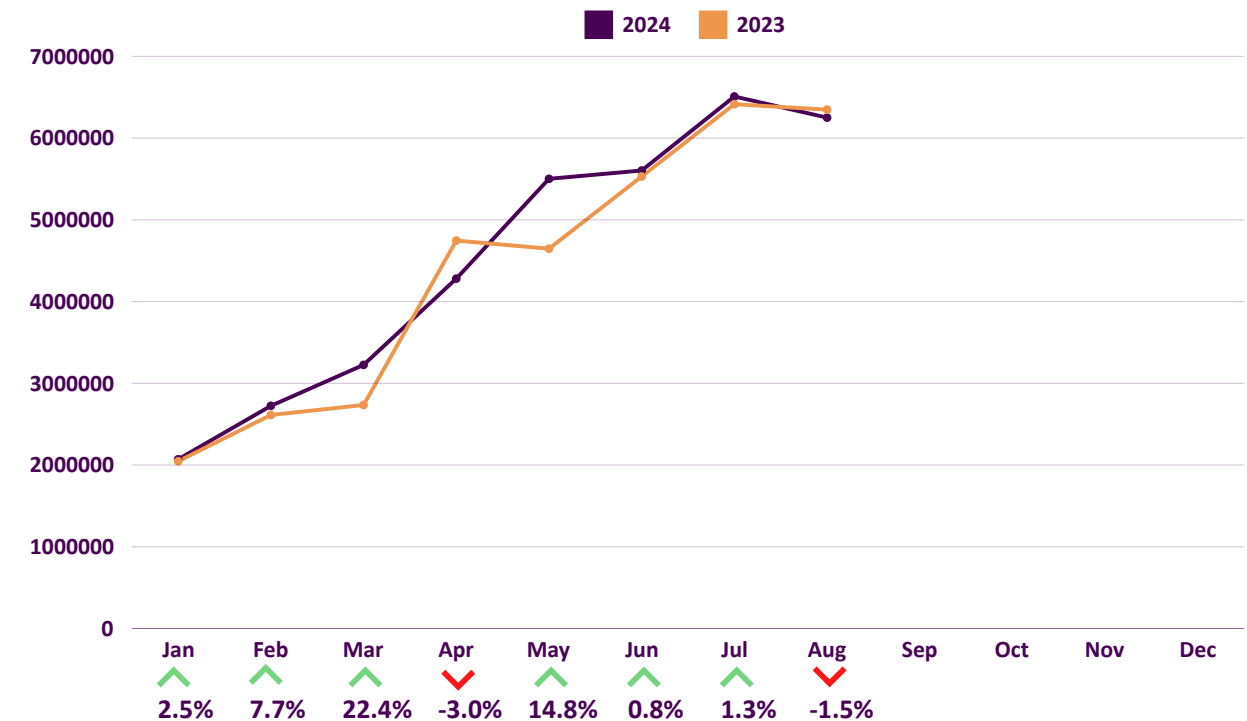
Moffat Centre for Travel and Tourism Business Development

Glasgow Caledonian University



HIGHLIGHTS

Monthly Comparison



The largest percentage increase in visits recorded by former VisitScotland Regions for August 2024 was experienced by visitor attractions in the Perthshire Region.

The largest percentage decrease in visits recorded by former VisitScotland Regions for August 2024 was experienced by visitor attractions in the Scottish Borders Region.

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

During this period, attractions in the Historic Houses/Palaces category recorded the largest percentage increase in visits.

Attractions in the Industrial/Workplaces category recorded the greatest percentage decrease in visits compared to August 2023.

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

Attractions in Other Urban Areas saw the most significant increase when comparing August 2024 with August 2023.

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

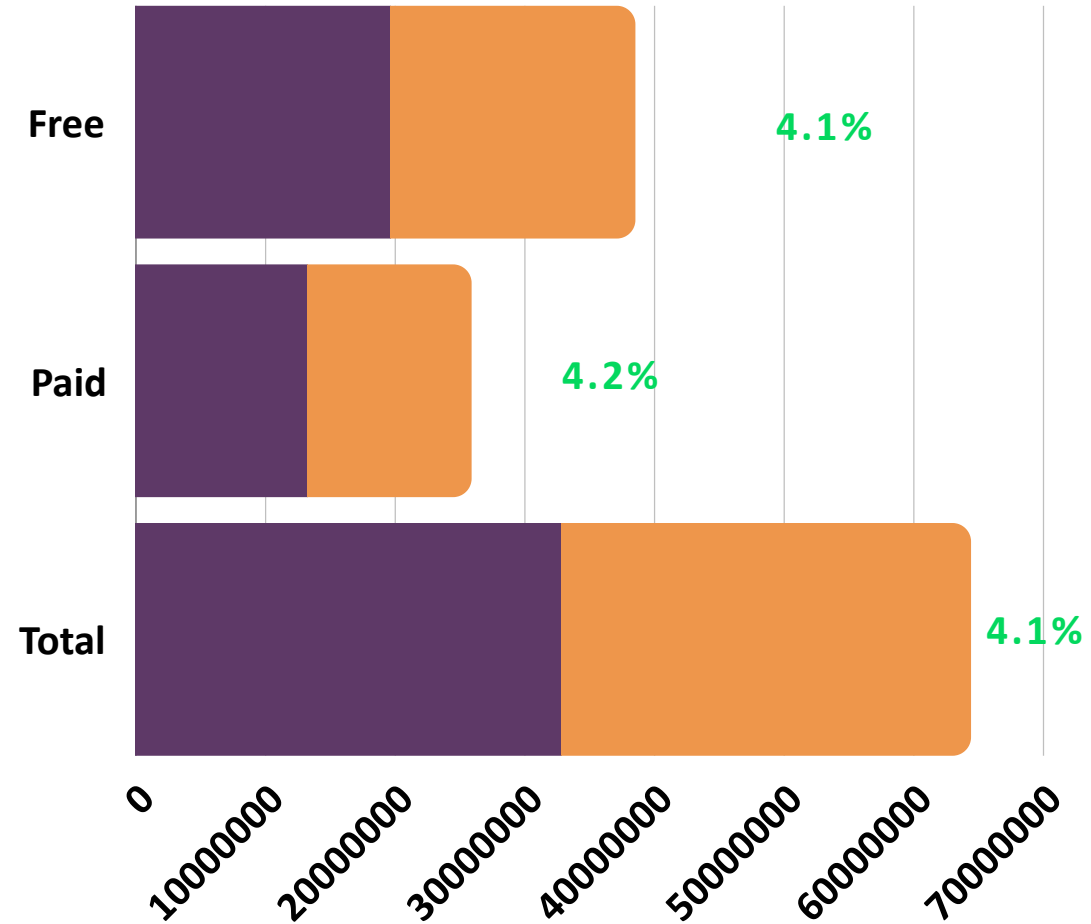
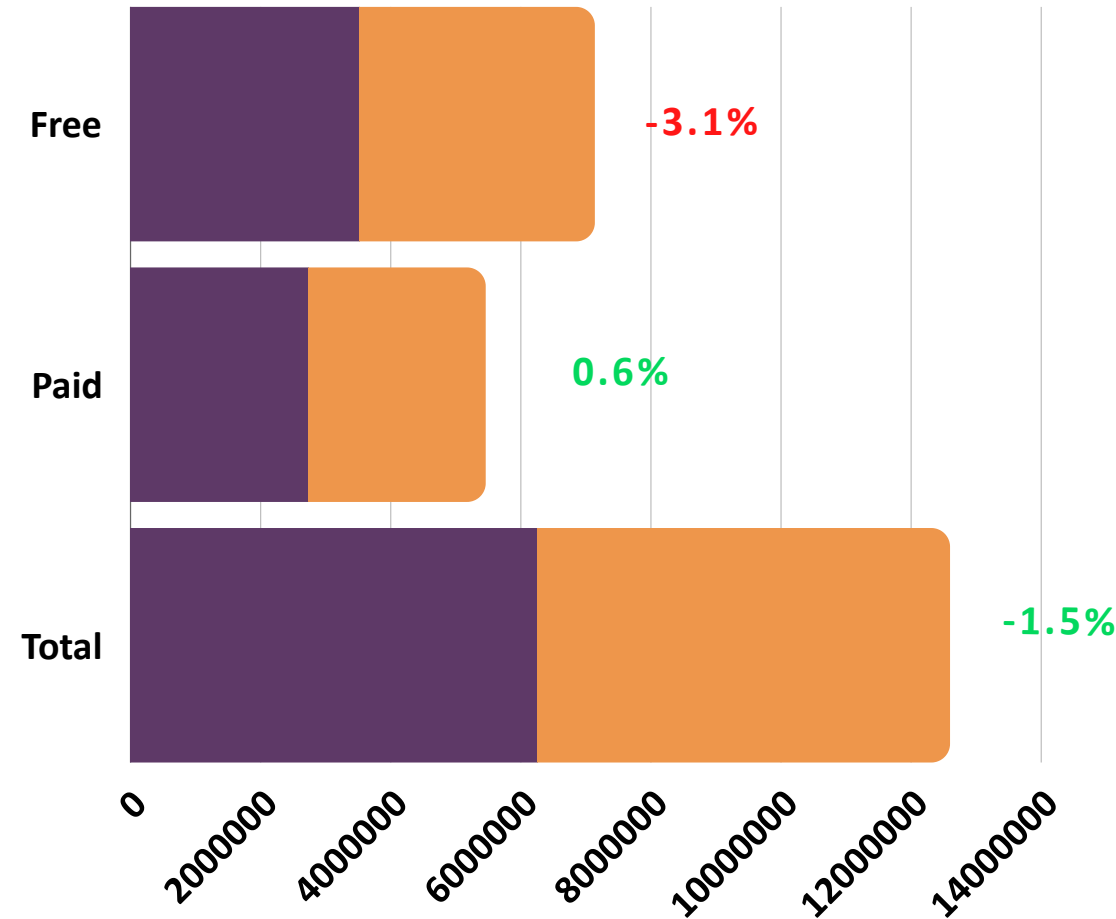
ADMISSIONS

Policy Overview

2024 2023

August 2024 vs. August 2023 Comparison

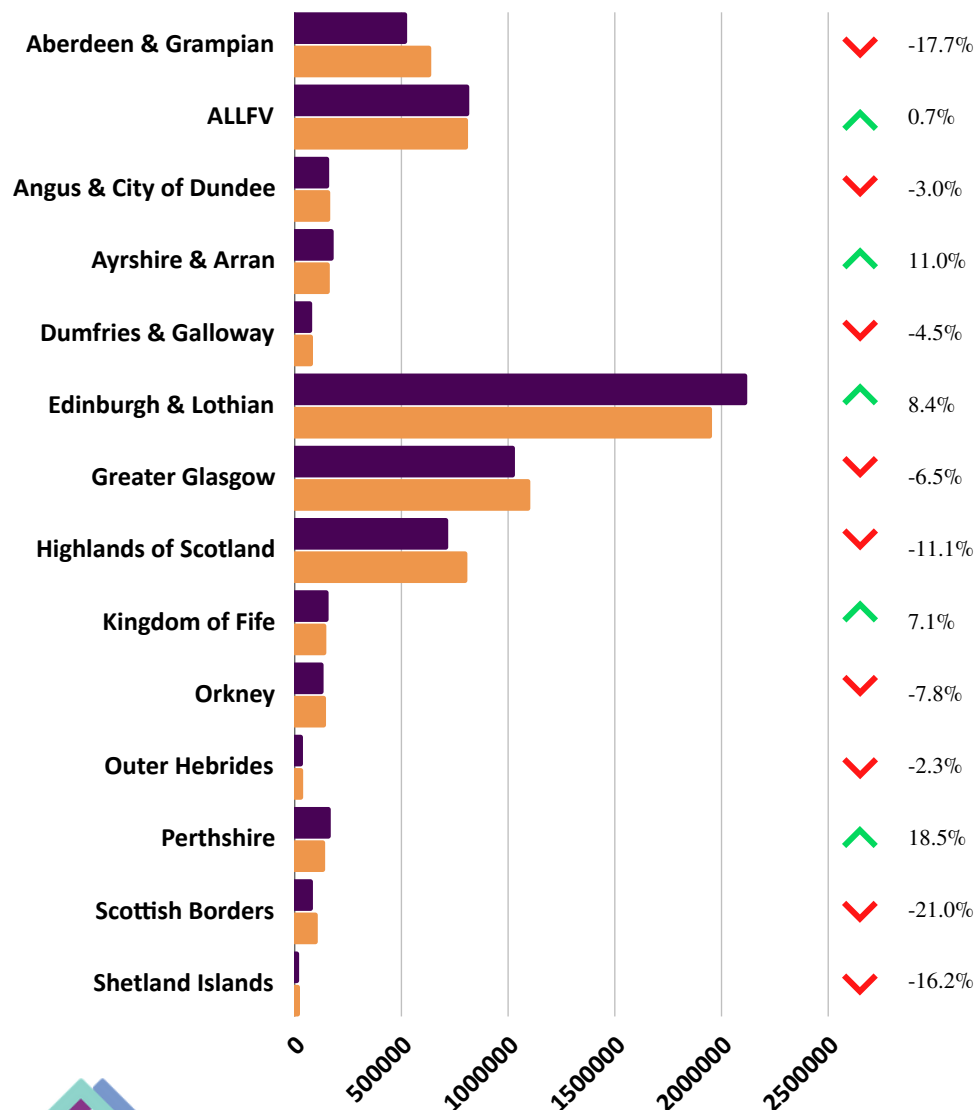
Year to Date 24 vs. 23 Comparison



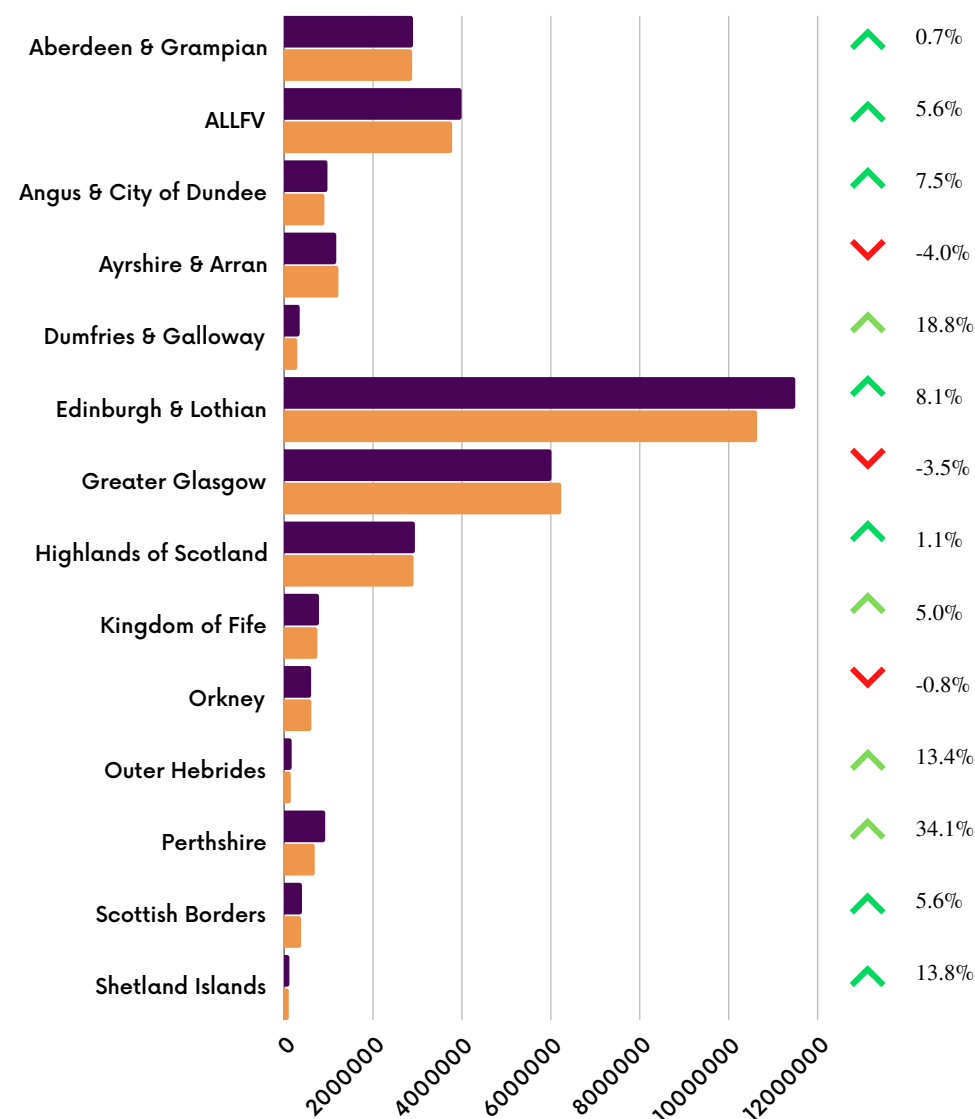
PERFORMANCE

By Former Visit Scotland Area

2024 August (vs. 2023)



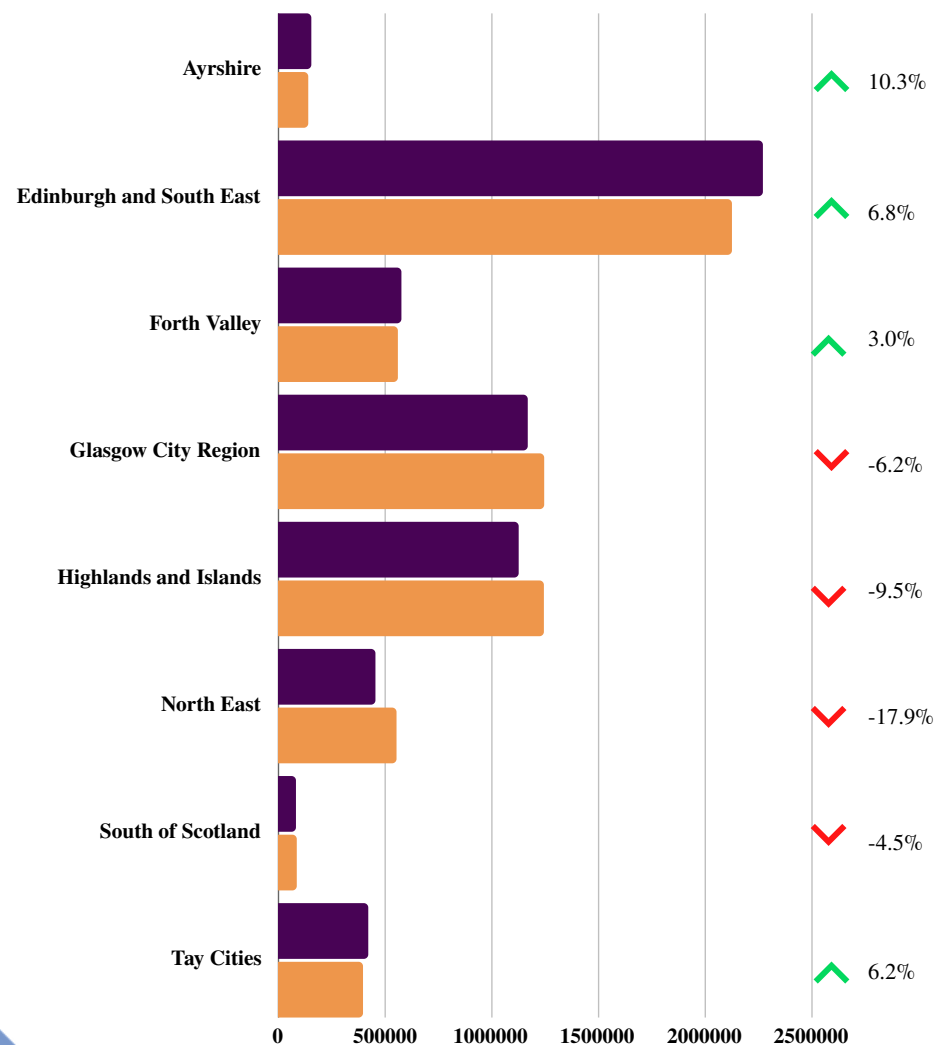
2024 Year to Date (vs. 2023)



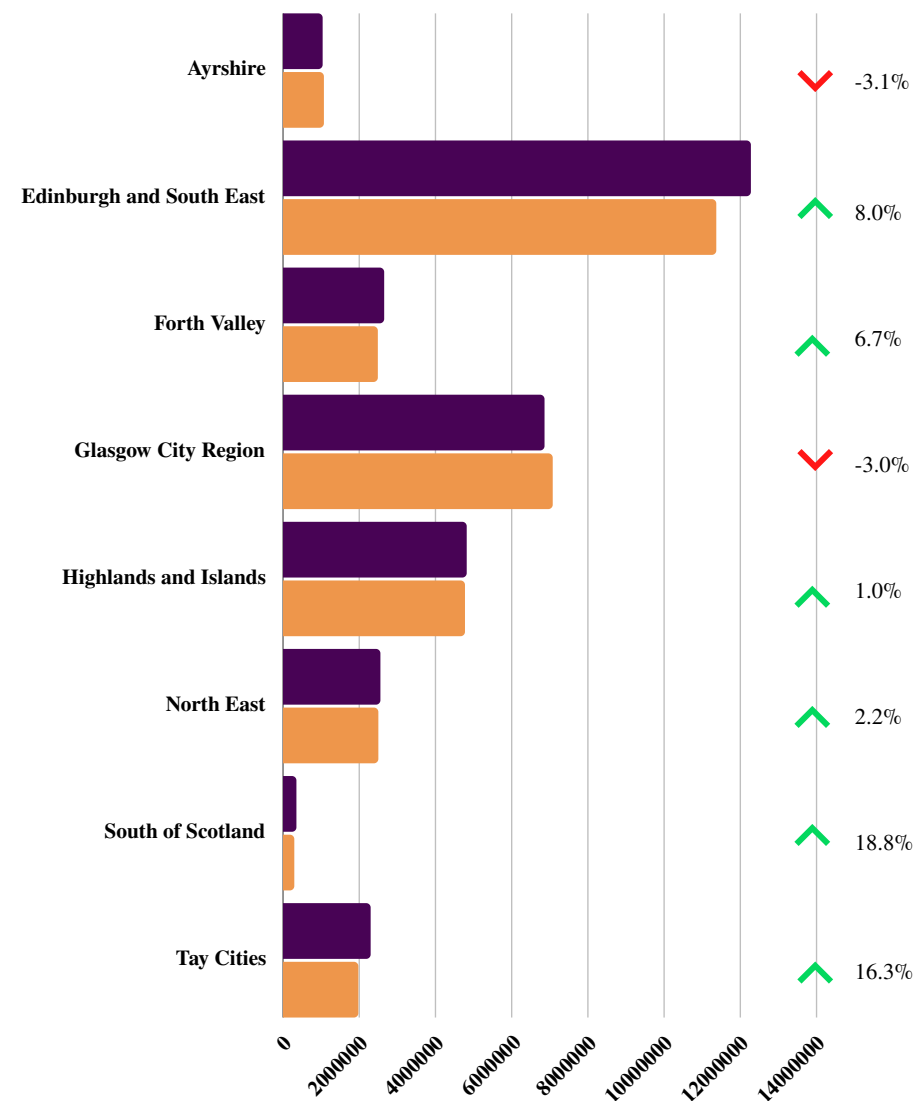
PERFORMANCE

By Regional Economic Partnerships

2024 August (vs. 2023)



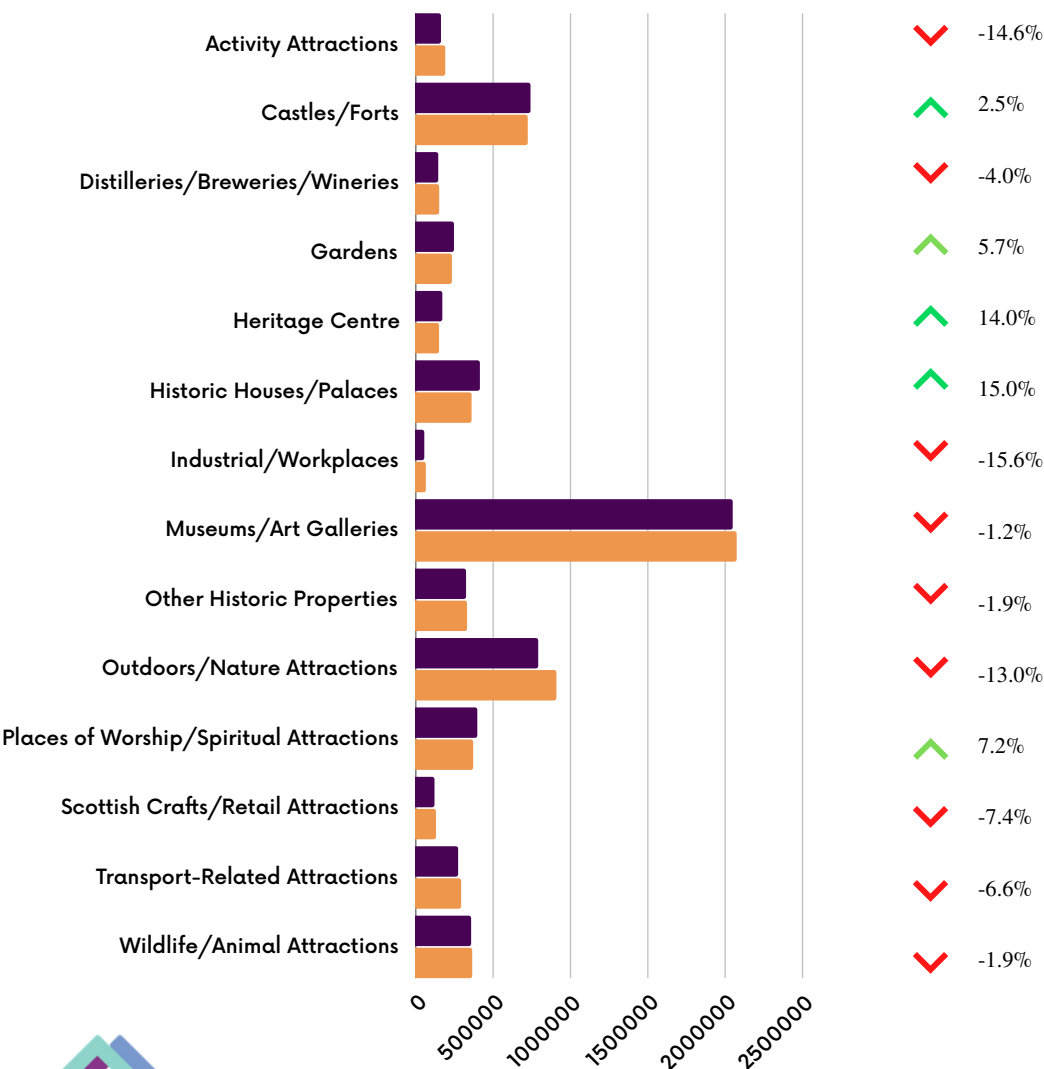
2024 Year to Date (vs. 2023)



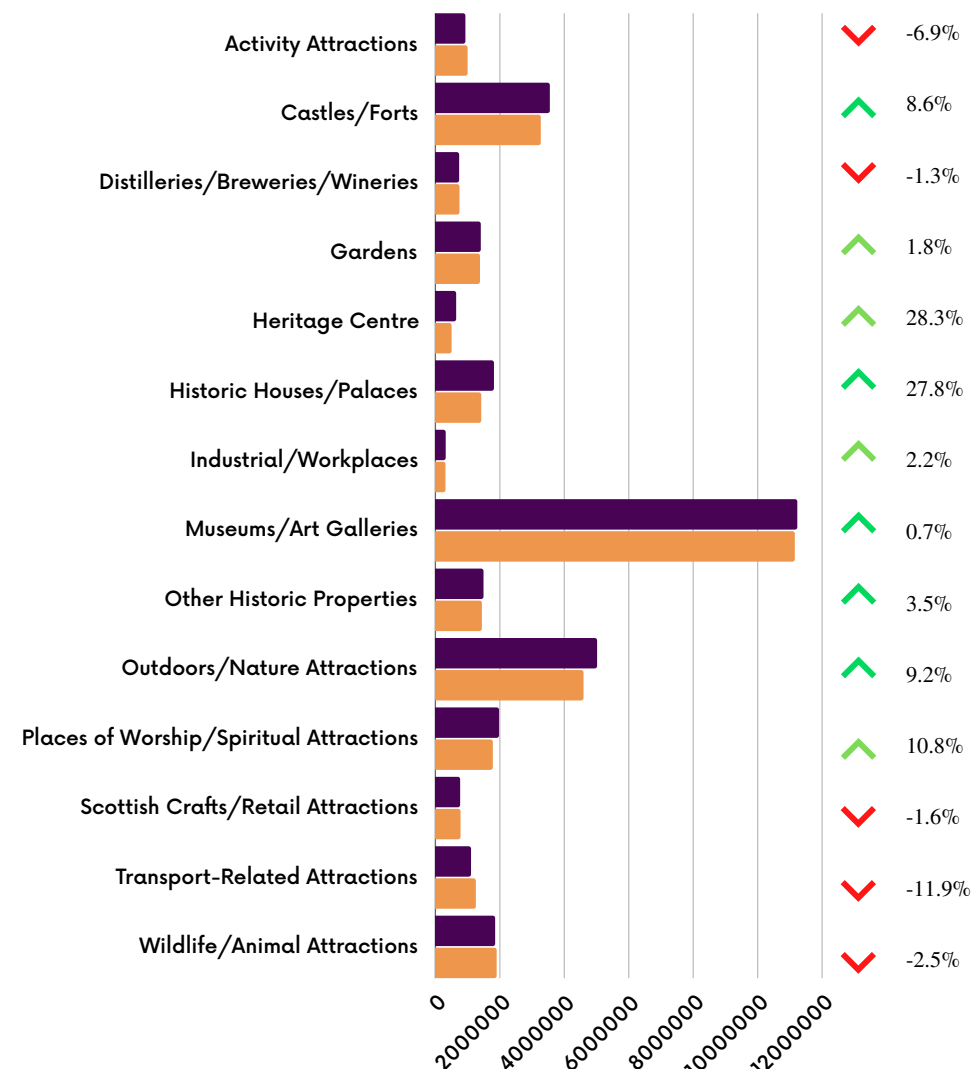
PERFORMANCE

By Attraction Category

2024 August (vs. 2023)



2024 Year to Date (vs. 2023)



PERFORMANCE

By Location Accessibility & Density

2024 August (vs. 2023)

-6%

Accessible Rural

-12%

Accessible Small Towns

2%

Large Urban Areas

4%

Other Urban Areas

-10%

Remote Rural

-21%

Remote Small Towns

2024 Year to Date (vs. 2023)

3%

Accessible Rural

58%

Accessible Small Towns

3%

Large Urban Areas

8%

Other Urban Areas

-1%

Remote Rural

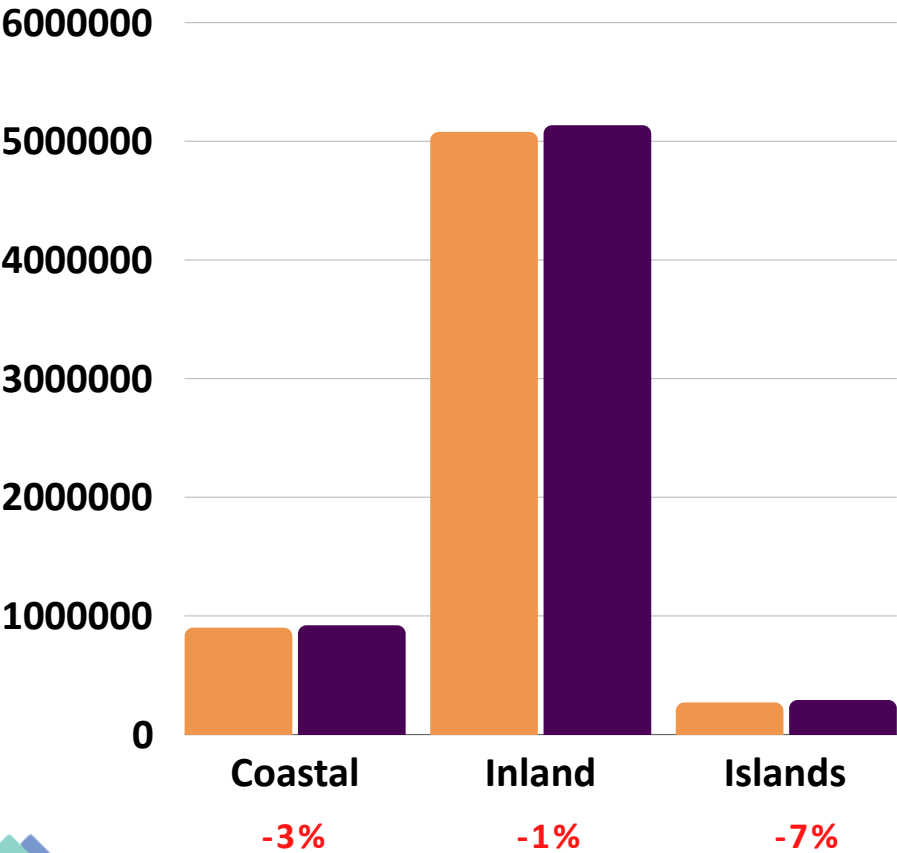
0%

Remote Small Towns

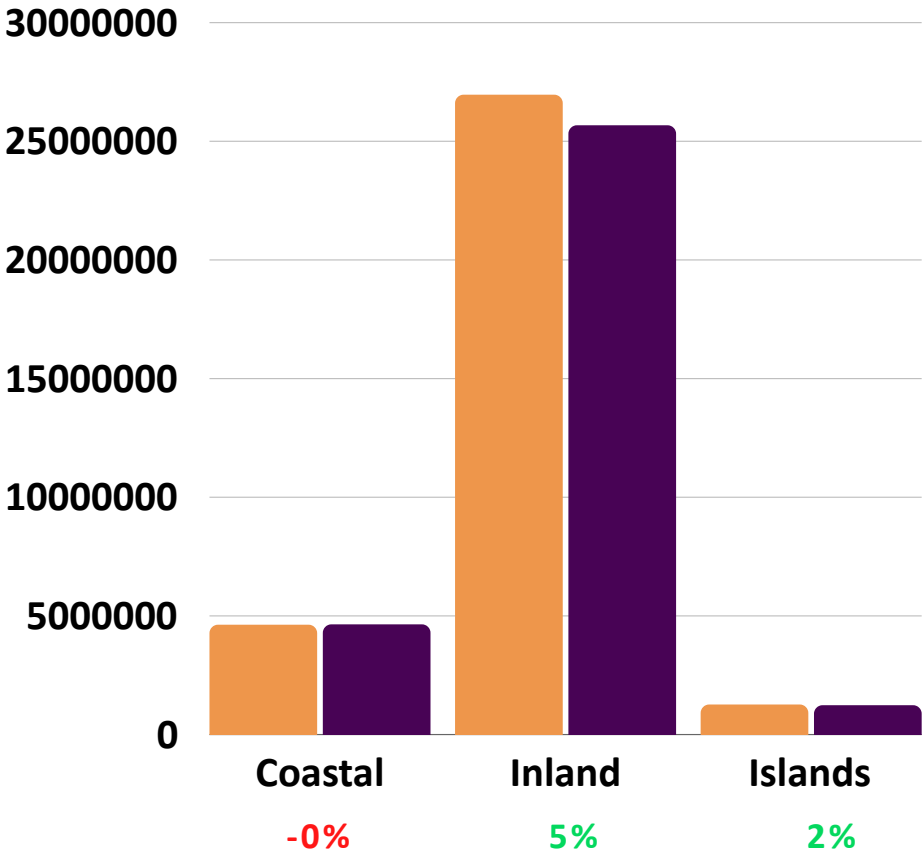
PERFORMANCE

By Geographic Location

2024 August (vs. 2023)



2024 Year to Date (vs. 2023)



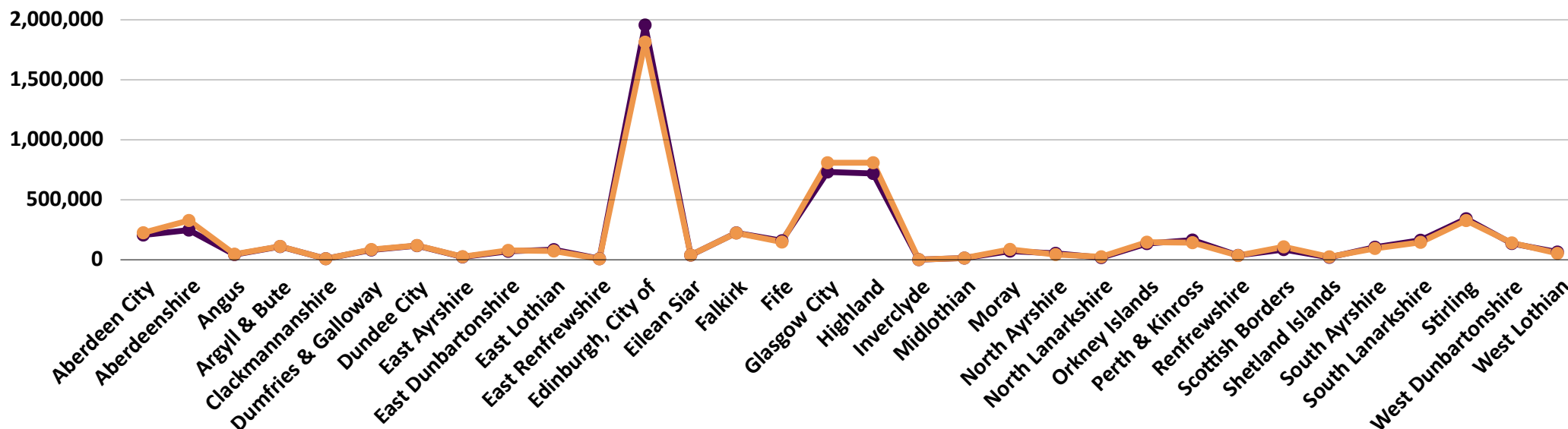
PERFORMANCE

2024

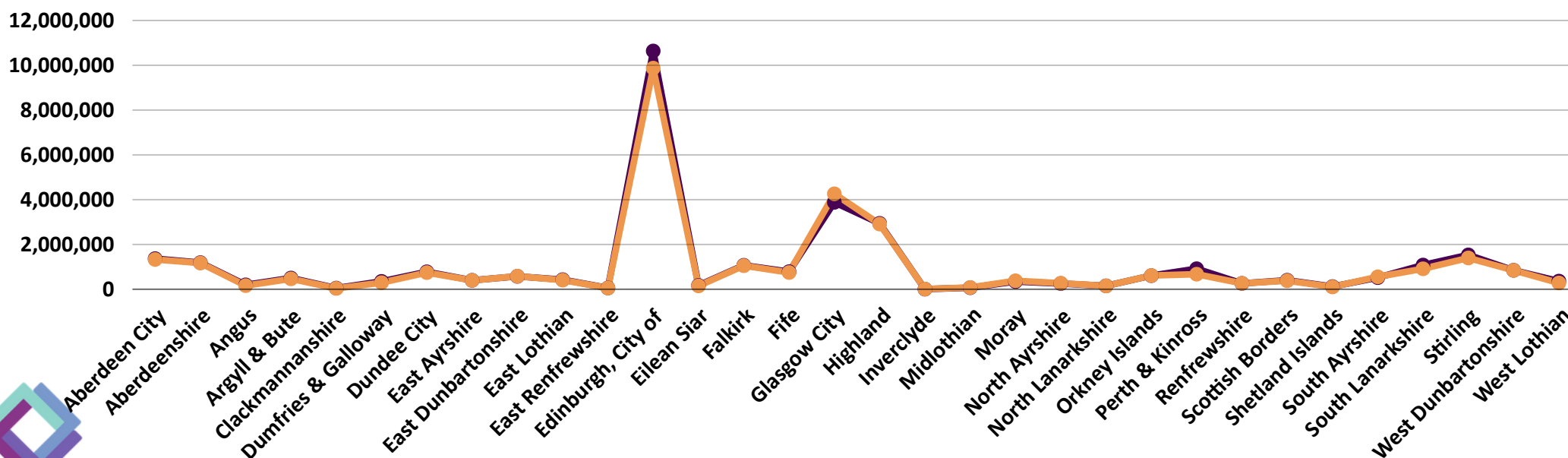
2023

By Council Area

2024 August (vs. 2023)



2024 Year to Date (vs. 2023)



PERFORMANCE

By Visit Scotland Area

2024 August (vs. 2023)

Admission By Region				
Region	No of Attractions	2024	2023	% Change
Aberdeen & Grampian	80	526829	639804	-17.7%
ALLFV	73	818021	812239	0.7%
Angus & City of Dundee	32	161550	166483	-3.0%
Ayrshire & Arran	26	182573	164469	11.0%
Dumfries & Galloway	38	81863	85695	-4.5%
Edinburgh & Lothian	85	2120544	1955540	8.4%
Greater Glasgow	57	1032021	1104095	-6.5%
Highlands of Scotland	57	719321	809178	-11.1%
Kingdom of Fife	35	158778	148241	7.1%
Orkney	22	135271	146740	-7.8%
Outer Hebrides	14	38706	39605	-2.3%
Perthshire	28	168962	142624	18.5%
Scottish Borders	31	85385	108104	-21.0%
Shetland Islands	15	20738	24744	-16.2%

Year to Date 2024/2023

Ytd Admission By Region				
Region	No of Attractions	2024	2023	% Change
Aberdeen & Grampian	80	2899909	2880086	0.7%
ALLFV	73	3991773	3779215	5.6%
Angus & City of Dundee	32	975451	907072	7.5%
Ayrshire & Arran	26	1173583	1222205	-4.0%
Dumfries & Galloway	38	351150	295595	18.8%
Edinburgh & Lothian	85	11497951	10639157	8.1%
Greater Glasgow	57	6015009	6233068	-3.5%
Highlands of Scotland	57	2942708	2911119	1.1%
Kingdom of Fife	35	785036	747944	5.0%
Orkney	22	608192	613131	-0.8%
Outer Hebrides	14	170900	150707	13.4%
Perthshire	28	924793	689400	34.1%
Scottish Borders	31	402206	381037	5.6%
Shetland Islands	15	119273	104845	13.8%

By Regional Economic Partnerships

2024 August (vs. 2023)

Admission By Sgrop				
SGREP	No of Attractions	2024	2023	% Change
Ayrshire	21	153883	139508	10.3%
Edinburgh and South East	131	2269961	2124918	6.8%
Forth Valley	34	576072	559465	3.0%
Glasgow City Region	63	1168097	1245106	-6.2%
Highlands and Islands	173	1125601	1243666	-9.5%
North East	54	454357	553129	-17.9%
South of Scotland	38	81863	85695	-4.5%
Tay Cities	79	420728	396074	6.2%

Year to Date 2024/2023

Admission By Sgrop				
SGREP	No of Attractions	2024	2023	% Change
Ayrshire	21	1039311	1072367	-3.1%
Edinburgh and South East	131	12277362	11369309	8.0%
Forth Valley	34	2654103	2487666	6.7%
Glasgow City Region	63	6861879	7076920	-3.0%
Highlands and Islands	173	4819974	4774468	1.0%
North East	54	2555191	2501343	2.2%
South of Scotland	38	351150	295595	18.8%
Tay Cities	79	2298964	1976913	16.3%

PERFORMANCE

By Attraction Category

2024 August (vs. 2023)

Admission By Category				
Category	No of Attractions	2024	2023	% Change
Activity Attractions	13	162592	190339	-14.6%
Castles/Forts	53	741550	723729	2.5%
Distilleries/Breweries/Wineries	51	145043	151118	-4.0%
Gardens	24	246752	233384	5.7%
Heritage Centre	18	171429	150429	14.0%
Historic Houses/Palaces	44	414222	360346	15.0%
Industrial/Workplaces	9	54797	64947	-15.6%
Museums/Art Galleries	228	2048631	2074395	-1.2%
Other Historic Properties	58	324815	331183	-1.9%
Outdoors/Nature Attractions	44	791278	909055	-13.0%
Places of Worship/Spiritual Attractions	15	397578	370739	7.2%
Scottish Crafts/Retail Attractions	4	120719	130297	-7.4%
Transport-Related Attractions	10	273562	292970	-6.6%
Wildlife/Animal Attractions	22	357594	364630	-1.9%

Year to Date 2024/2023

Ytd Admission By Category				
Category	No of Attractions	2024	2023	% Change
Activity Attractions	13	931458	1000158	-6.9%
Castles/Forts	53	3551559	3270797	8.6%
Distilleries/Breweries/Wineries	51	737527	747413	-1.3%
Gardens	24	1408929	1384517	1.8%
Heritage Centre	18	644749	502704	28.3%
Historic Houses/Palaces	44	1817263	1422483	27.8%
Industrial/Workplaces	9	320066	313042	2.2%
Museums/Art Galleries	228	11230777	11152953	0.7%
Other Historic Properties	58	1493388	1442923	3.5%
Outdoors/Nature Attractions	44	5017950	4597252	9.2%
Places of Worship/Spiritual Attractions	15	1975088	1782796	10.8%
Scottish Crafts/Retail Attractions	4	768436	780662	-1.6%
Transport-Related Attractions	10	1105978	1255420	-11.9%
Wildlife/Animal Attractions	22	1854766	1901461	-2.5%

By Admission Charges

2024 August (vs. 2023)

Admission By Admission				
Admission	No of Attractions	2024	2023	% Change
Free	263	3512973	3625022	-3.1%
Paid	330	2737589	2722539	0.6%

Year to Date 2024/2023

Ytd Admission By Admission				
Admission	No of Attractions	2024	2023	% Change
Free	263	19648279	18875112	4.1%
Paid	330	13209655	12679469	4.2%

PERFORMANCE

By Volume of Visits

2024 August (vs. 2023)

Admission By Volume Visits				
VolumeVisits	No of Attractions	2024	2023	% Change
0 - 4,999	165	64853	53741	20.7%
5,000 - 9,999	78	92091	85571	7.6%
10,000 - 19,999	80	159399	160193	-0.5%
20,000 - 49,999	106	558192	514353	8.5%
50,000 - 99,999	73	740560	932385	-20.6%
100,000 +	91	4635467	4601318	0.7%

Year to Date 2024/2023

Admission By Volume Visits				
VolumeVisits	No of Attractions	2024	2023	% Change
0 - 4,999	165	289541	216085	34.0%
5,000 - 9,999	78	414488	354946	16.8%
10,000 - 19,999	80	768403	728072	5.5%
20,000 - 49,999	106	2648517	2296768	15.3%
50,000 - 99,999	73	3562570	3574149	-0.3%
100,000 +	91	25174415	24384561	3.2%

By Location/Density

2024 August(vs. 2023)

Admission By Urban Rural				
UrbanRural	No of Attractions	2024	2023	% Change
Accessible Rural	121	881818	936921	-5.9%
Accessible Small Towns	41	118084	134373	-12.1%
Large Urban Areas	121	3091530	3025802	2.2%
Other Urban Areas	100	1119847	1076511	4.0%
Remote Rural	170	905204	1002619	-9.7%
Remote Small Towns	40	134079	171335	-21.7%

Year to Date 2024/2023

Admission By Urban Rural				
UrbanRural	No of Attractions	2024	2023	% Change
Accessible Rural	121	4445900	4321089	2.9%
Accessible Small Towns	41	714979	452159	58.1%
Large Urban Areas	121	17114811	16632705	2.9%
Other Urban Areas	100	5969152	5516581	8.2%
Remote Rural	170	3996408	4015691	-0.5%
Remote Small Towns	40	616684	616356	0.1%

By Geographic Area

2024 August (vs. 2023)

Admission By Location				
Location	No of Attractions	2024	2023	% Change
Coastal	155	900918	920973	-2.2%
Inland	363	5079138	5135247	-1.1%
Islands	75	270506	291341	-7.2%

Year to Date 2024/2023

Ytd Admission By Location				
Location	No of Attractions	2024	2023	% Change
Coastal	155	4628356	4643570	-0.3%
Inland	363	26963363	25674656	5.0%
Islands	75	1266215	1236355	2.4%

PERFORMANCE

By Council Area

2024 August (vs. 2023)

Admission By Council Council	No of Attractions	2024	2023	% Change
Aberdeen City	15	206567	225506	-8.4%
Aberdeenshire	39	247790	327623	-24.4%
Angus	17	43326	46792	-7.4%
Argyll & Bute	34	110403	111763	-1.2%
Clackmannanshire	4	9316	8842	5.4%
Dumfries & Galloway	38	81863	85695	-4.5%
Dundee City	14	117914	119398	-1.2%
East Ayrshire	8	23876	25963	-8.0%
East Dunbartonshire	3	71026	78543	-9.6%
East Lothian	19	84678	73387	15.4%
East Renfrewshire	2	9025	8014	12.6%
Edinburgh, City of	55	1956806	1813767	7.9%
Eilean Siar	14	38706	39605	-2.3%
Falkirk	10	224475	223398	0.5%
Fife	35	158778	148241	7.1%
Glasgow City	26	732082	808782	-9.5%
Highland	57	719321	809178	-11.1%
Inverclyde	2	1567	2059	-23.9%
Midlothian	3	14397	14609	-1.5%
Moray	26	72472	86675	-16.4%
North Ayrshire	9	53986	43710	23.5%
North Lanarkshire	4	18699	25287	-26.1%
Orkney Islands	22	135271	146740	-7.8%
Perth & Kinross	28	164742	142917	15.3%
Renfrewshire	9	36502	35540	2.7%
Scottish Borders	31	85385	108104	-21.0%
Shetland Islands	15	20738	24744	-16.2%
South Ayrshire	9	104711	94796	10.5%
South Lanarkshire	11	163120	145870	11.8%
Stirling	20	342281	327225	4.6%
West Dunbartonshire	6	136076	141011	-3.5%
West Lothian	8	64663	53777	20.2%

2024 Year to Date (vs. 2023)

Admission By Council Council	No of Attractions	2024	2023	% Change
Aberdeen City	15	1366246	1329774	2.7%
Aberdeenshire	39	1188945	1171569	1.5%
Angus	17	195212	161615	20.8%
Argyll & Bute	34	499911	466085	7.3%
Clackmannanshire	4	50827	37450	35.7%
Dumfries & Galloway	38	351150	295595	18.8%
Dundee City	14	779037	744411	4.7%
East Ayrshire	8	399024	396530	0.6%
East Dunbartonshire	3	576912	582677	-1.0%
East Lothian	19	427953	407663	5.0%
East Renfrewshire	2	58232	53985	7.9%
Edinburgh, City of	55	10638657	9872858	7.8%
Eilean Siar	14	170900	150707	13.4%
Falkirk	10	1069711	1053244	1.6%
Fife	35	785036	747944	5.0%
Glasgow City	26	3880945	4261472	-8.9%
Highland	57	2942708	2911119	1.1%
Inverclyde	2	5814	8135	-28.5%
Midlothian	3	68595	77212	-11.2%
Moray	26	344718	378743	-9.0%
North Ayrshire	9	254561	270110	-5.8%
North Lanarkshire	4	151004	148837	1.5%
Orkney Islands	22	608192	613131	-0.8%
Perth & Kinross	28	916884	672058	36.4%
Renfrewshire	9	261451	264330	-1.1%
Scottish Borders	31	402206	381037	5.6%
Shetland Islands	15	119273	104845	13.8%
South Ayrshire	9	519998	555565	-6.4%
South Lanarkshire	11	1080651	913632	18.3%
Stirling	20	1533565	1396972	9.8%
West Dunbartonshire	6	846870	843852	0.4%
West Lothian	8	362746	281424	28.9%

CURRENCY - OVERVIEW

Currency Trends



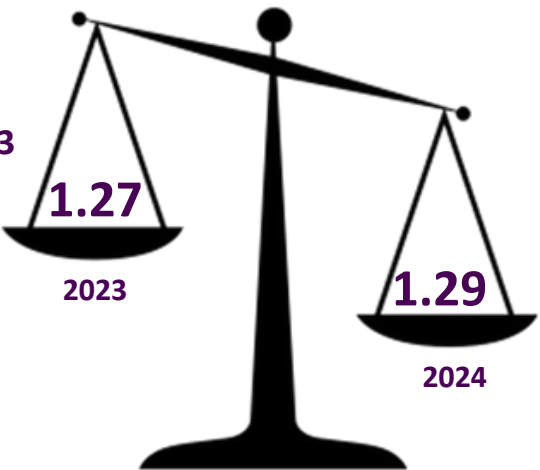
£ GBP to € EUR



August
2024 vs. 2023



£ GBP to \$ USD

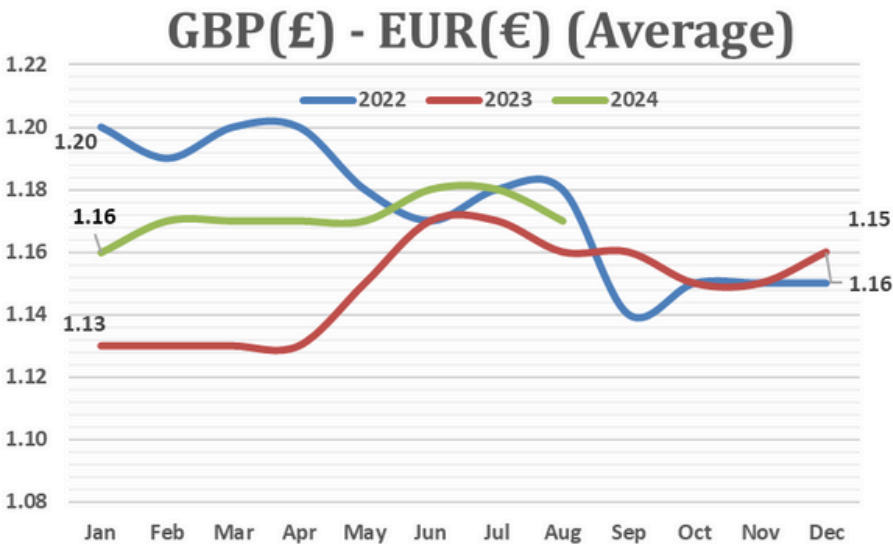


August
2024 vs. 2023

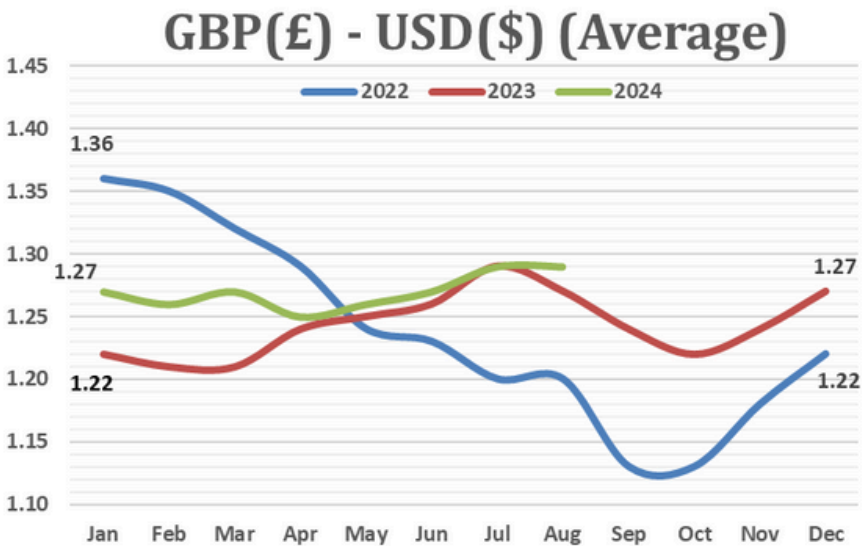


Source: www.ofx.com

£ GBP to € EUR - 3 Year Average



£ GBP to \$ USD - 3 Year Average



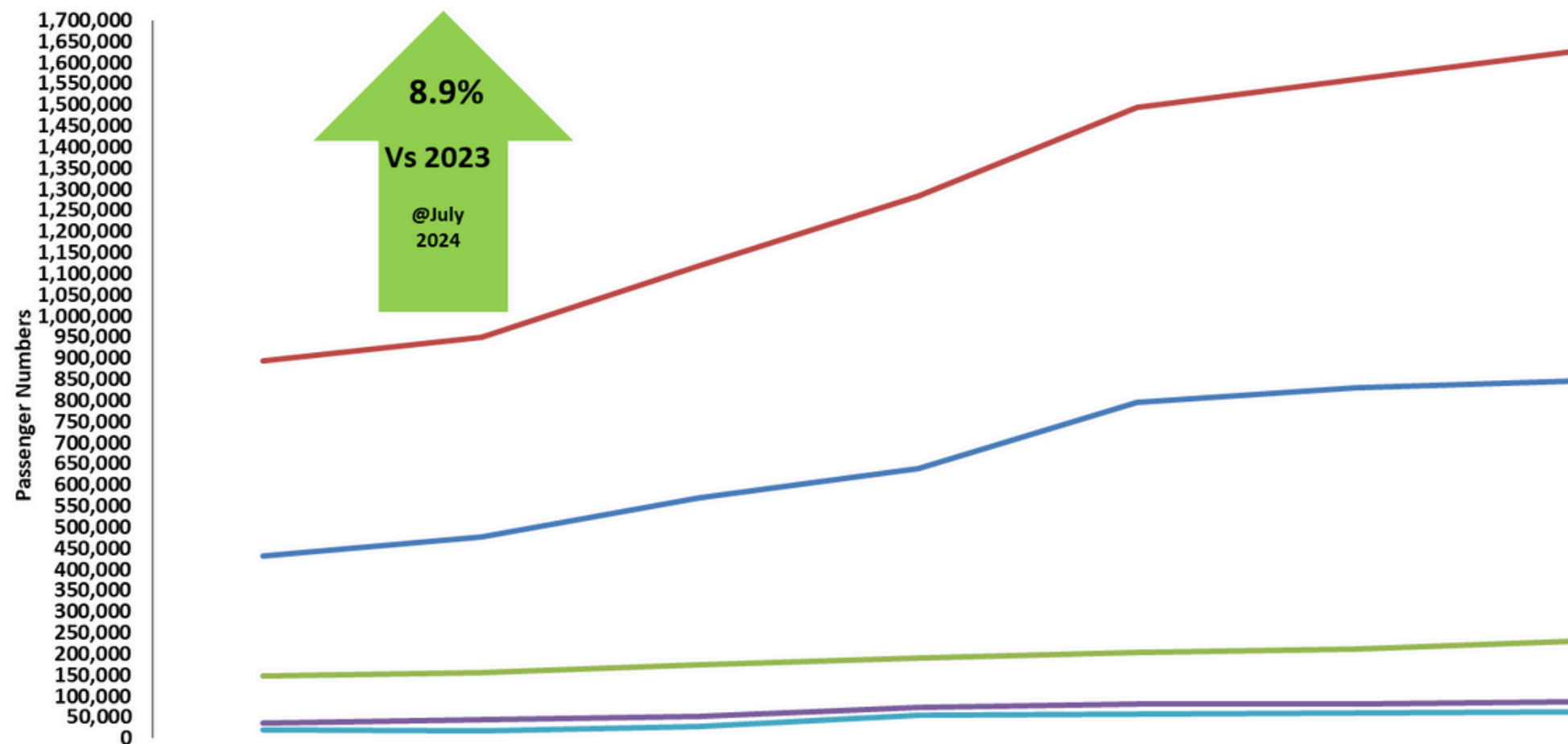
AIRPORT PASSENGER - OVERVIEW



Top Five Scottish Airports

Terminal & Transit Passengers at Scotland's Five Main Airports

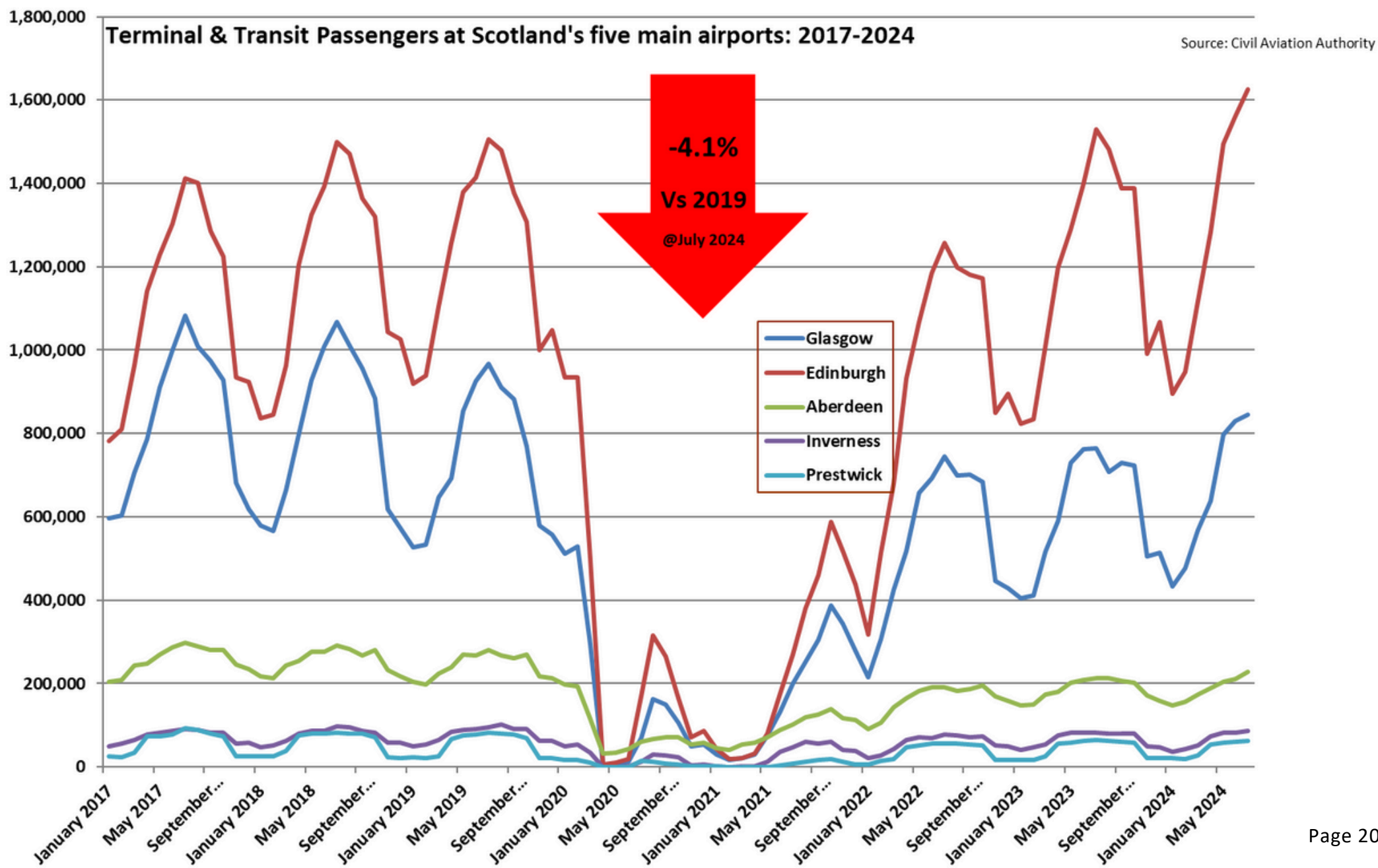
Source: Civil Aviation Authority



	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024
Glasgow	432,447	475,854	568,517	637,960	796,343	830,479	846,250
Edinburgh	894,763	948,005	1,118,057	1,283,382	1,494,105	1,560,119	1,626,726
Aberdeen	147,266	156,482	174,666	189,148	203,708	211,464	229,349
Inverness	37,209	43,964	51,219	74,380	81,413	81,332	87,429
Prestwick	20,902	18,110	28,114	53,446	57,358	60,185	63,619

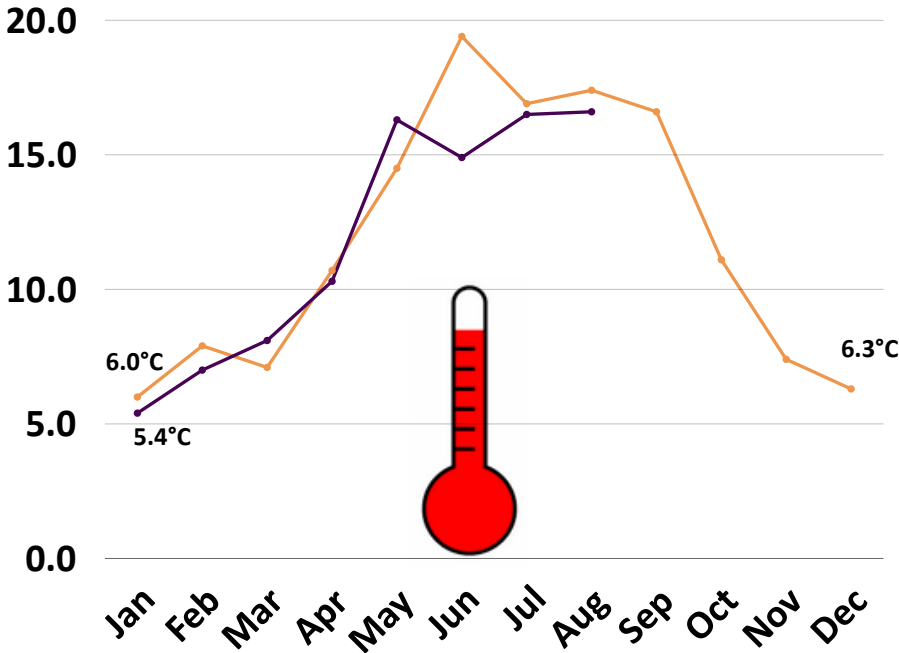


Top Five Scottish Airports

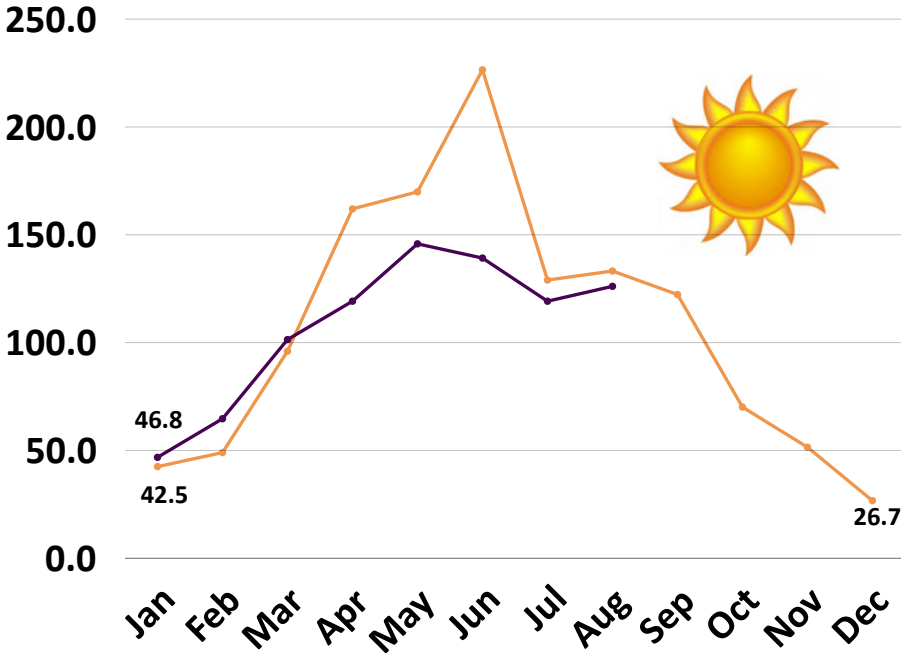


WEATHER: SCOTLAND - OVERVIEW

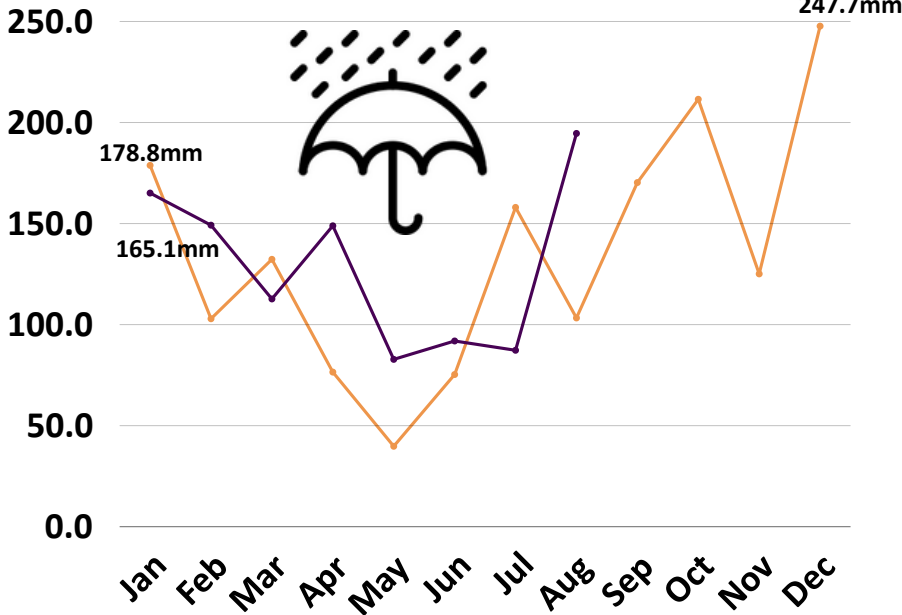
Average Temperature



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.



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This report should be quoted as:

Moffat Centre (2024): Scottish Visitor Attraction Barometer Report: August 2024/2023, Glasgow School for Business and Society, Glasgow Caledonian University: Glasgow, UK.

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