SCOTTISH VISITOR ATTRACTION MONITOR

2024

EDITION

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ACKNOWLEDGEMENTS

The authors would like to acknowledge the support and assistance of the representatives and operators in the attraction sector who completed the 2024 Survey of Visits to Visitor Attractions and the monthly returns for the Visitor Attraction Barometer, without such contribution this publication would not have been possible.

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Produced by the Moffat Centre for Travel and Tourism Business Development Glasgow School for Business and Society Glasgow Caledonian University

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Definition of a Visitor Attraction

"An attraction whose primary purpose is sightseeing; a visitor attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. Also, the attraction must be a single business, under single management, so that it is capable of answering the economic questions on revenue, employment, etc."

Confidentiality

Visit figures are not published in the report if the tourist attraction operator/respondent indicated figures should remain confidential. However, they are used in aggregate figures and other calculations.

Admission

Where there is no admission charge, 'F' denotes free entry to the main element of the attraction. Such attractions may include elements with an admission charge, but the majority of visits to an attraction noted 'F' will be free of charge.

Percentage Change

Percentage changes in 2024/2023 are rounded to a maximum of two decimal points.

Monthly visits

A monthly breakdown of visits is only used to show the distribution of visits/seasonality across the year. Attractions providing monthly breakdowns may provide exact figures for part of their operation and exclude estimated figures for the total site. Hence sometimes these figures do not reflect total visits.

Analysis Variables & Changes to Methodology

Variables used in this report to analyse 2024 data are the same as those used in the 2023 report. Further details are included in the Appendices.

THE YEAR 2024

Visitors to Scottish attractions in 2024 recorded an increase of 3.9% compared to 2023.

In 2024, the underlying consumer economic situation in the UK continued with the cost-of-living trend. Increasing interest rates to control inflation impacted domestic household budgets, while international inbound travellers benefited from a stronger currency exchange rate. Inflation started to stabilise towards the end of the year. Evidence from the Domestic Sentiment Tracker published by the GB National Tourist Boards showed that the Cost of Living, the weather and personal financial situation were the main concerns when planning and booking a leisure break. However, domestic residents' outbound travel was returning to normal patterns. Regarding domestic trips, overnight visits within Scotland were down in volume and spending compared to 2023, while day trips within Scotland were comparable to the previous year.

Data from UNWTO noted that an estimated 1.4 billion International tourists (overnight visitors) were recorded around the world in 2024, an increase of 11% over 2023. International tourism recovered 88% of pre-pandemic levels, supported by strong pent-up demand. Europe welcomed 747 million of the 1.4 billion travellers recorded globally in 2024. It was the world's most visited destination region, and saw a 1% increase when compared to 2019 and a 5% increase compared to 2023. These increases were supported by robust intra-regional demand.

According to the US National Travel and Tourism Office (NTTO), US travel to Europe grew 10.1% through October (compared to 2023) and represented 21.3% of total US overseas travel.

International visits to Scotland posted strong recovery in 2024 with Trips and Spend both exceeding that seen in 2023 & 2019. Europe and North America made up the majority of inbound visitors.

Domestically, figures taken from the Great Britain Tourism Survey recorded 12.6 million GB residents took overnight trips in Scotland in 2024, down -6% on 2023. There were 34.6 million nights and generated £3.2 billion in expenditure, a drop of -7% compared to the previous year. Average spend per trip in 2024 was £251 and average length of stay was 2.7 nights. Day Trips by GB residents in Scotland during 2024 were comparable to 2023 with 92.9 million visits generating £3.9 billion spend, these only -2% and -1% down on the previous year. Average spend per trip £42.

Domestic Sentiment Tracker, published by the GB National Tourist Boards for 2024, showed that Scotland remained a popular destination over the year for domestic trips, being in the top 5 destinations in Britain. GB residents travel decisions were influenced by their personal financial situation which perhaps led to fewer overnight trips, trading down in accommodation and activities and seeking more value for money options. Travel intention remained strong however and visitor segments that had stronger financial positions continued to represent the robust visitor class over the year, such as Retirees.

THE YEAR 2024

In summary, the UK public took fewer overnight domestic trips in 2024 than in 2023, which is understandable given the household financial situation. Financial pressures and growing inflation also impacted Day trips. Both Paid and Free Attractions recorded an increase in visitor numbers in 2024 compared to 2023, Free attractions had the higher volume. Additionally, the majority of attraction sectors saw an increase in visitor numbers, with heritage and culture showing the largest growth.

Regional Attractions Summary, 2024

Former VisitScotland Regions

The change in the number of visits varied across Scotland, with attractions located in the Inland Regions experiencing the most significant percentage increase in visitor numbers. The Former VisitScotland Regions of Perthshire saw increases of over 17.5%. The Former VisitScotland Region of Ayrshire & Arran experienced the largest percentage decrease (-5.16%) in terms of the number of visits recorded.

Attraction Category

When exploring visits to attraction categories, the Heritage Centres category experienced the largest percentage increase in visits at 12.95% comparing 2024 with 2023.

Admission

Free admission attractions welcomed 63.8% of all visits to attractions in Scotland in 2024. However, paid admission attractions saw an increase of just over 2% compared with 2023. Greater Glasgow & Clyde Valley welcomed over 10.2 million visits to free admission visitor attractions. Those free admission attractions with over 100,000 annual visits, welcomed the majority of all visits.

Overseas and Domestic Visitation

The Orkney Islands, Places of Worship/Spiritual Attractions, Accessible Small Towns and Island-based Attractions welcomed the greatest proportion of Overseas visits in 2024.

THE YEAR 2024

Visitors from England, Northern Ireland and Wales constituted the biggest segment of visits to attractions in the Dumfries & Galloway Region, reflecting the continuing strong UK 'staycation' demand.

Ayrshire & Arran, Outdoors/Nature Attractions, Other Urban Areas and attractions welcoming between 50,000 and 99,000 visits per year received a predominantly local market.

Staffing

Employment in Visitor Attractions shows that Unpaid Volunteers represent 43.3% of the total workforce for 2024.

METHODOLOGY

From 1998 until 2009, the Visitor Attraction Monitor (VAM) research was undertaken and published on behalf of VisitScotland by the Moffat Centre for Travel and Tourism Business Development, Glasgow Caledonian University. Since May 2010 the Moffat Centre has undertaken this valuable research independently.

For the VAM 2024, survey questionnaires were distributed to 863 visitor attractions across Scotland. Some 641 responses were received, providing an overall response rate of 74.3% (see Table 1 below). Attractions included in the 2024 VAM are those where visits can be reasonably accurately recorded.

This report provides valuable performance-related information on visitor attractions in Scotland for the the calendar year 2024.

Table 1 Breakdown of Survey Responses

RESPONSE TYPE	SAMPLE
Cannot complete	5
Completed	619
Does not want to/Refused to complete	0
Permanently Closed	3
Temporarily closed	6

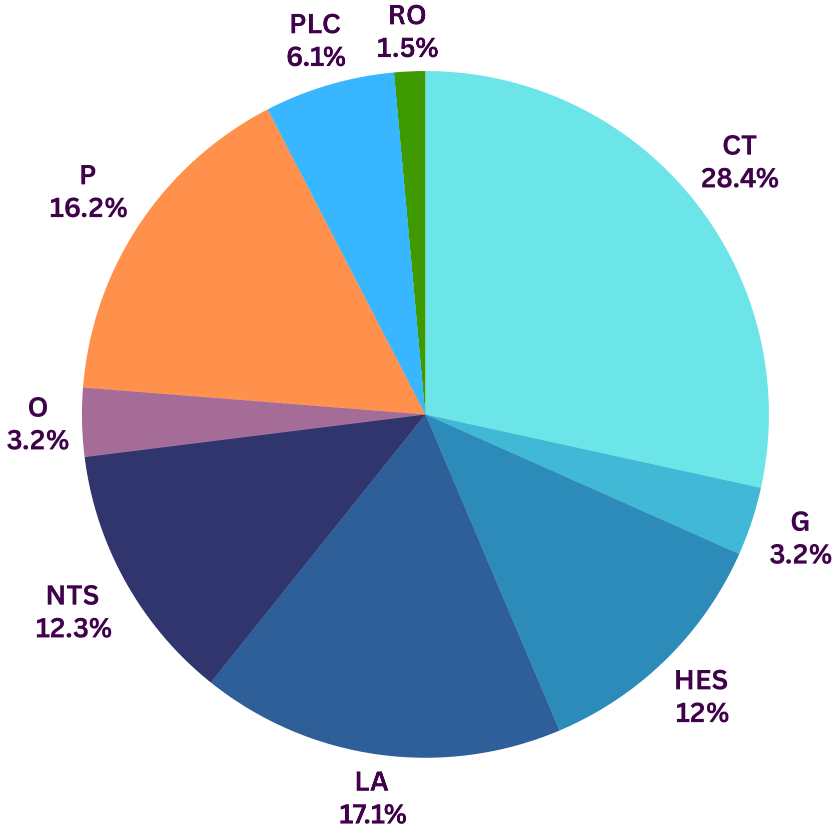
Some 170 attraction operators asked for their data to be kept confidential. I want you to know that this request is respected, and such attractions are not individually identified or their data identifiable in this report.

Operators who provided visits figures that achieved 'most visited in Scotland' status were asked to confirm the accuracy of the visits figures they submitted before publication.

Ownership of responding attractions is illustrated in the graph below:

As shown in the graph below, the attraction sector is dominated by the not-for-profit sector with Charitable Organisations (28.4%) and Local Authorities (17.1%) accounting for just over 45% of ownership.

Figure 1 Breakdown of Attractions by Ownership



Comparative Analysis of Total Visits to Scottish Visitor Attractions 2024/2023

2024 2023

Some 610 attraction operators provided total visits figures for both years 2024 and 2023.

The following table compares visits performance in 2024 with 2023.

Visitor attractions in Scotland experienced an increase of 3.9% in visits when comparing 2024 with 2023 .

Figure 2 Admission Policy 2024/2023 - Overview

Admission Policy - Overview

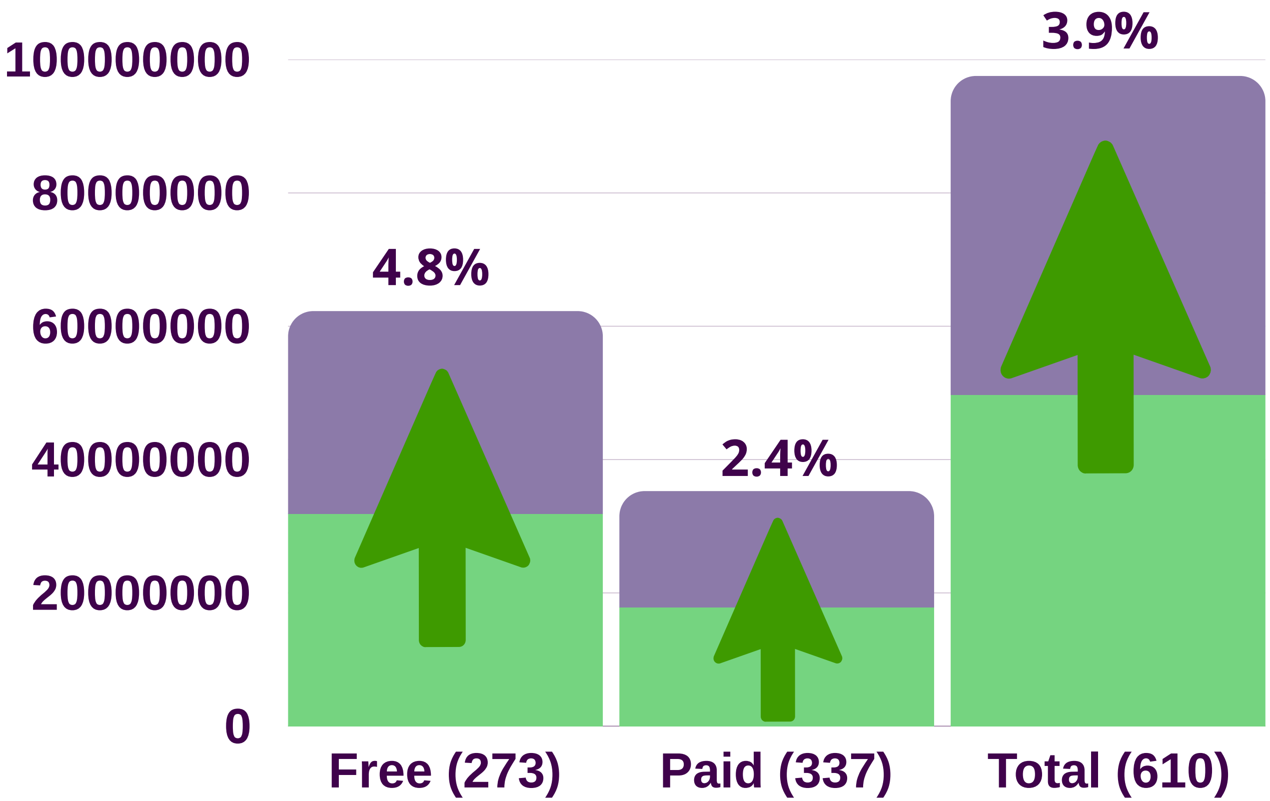


Figure 3 Total Visits 2024/2023 - Overview

Total Visits 2024/2023 - Overview

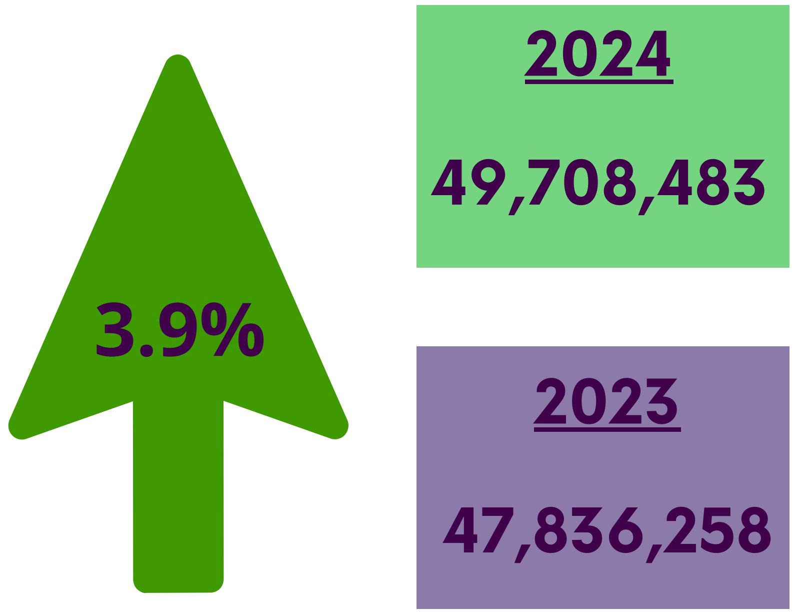
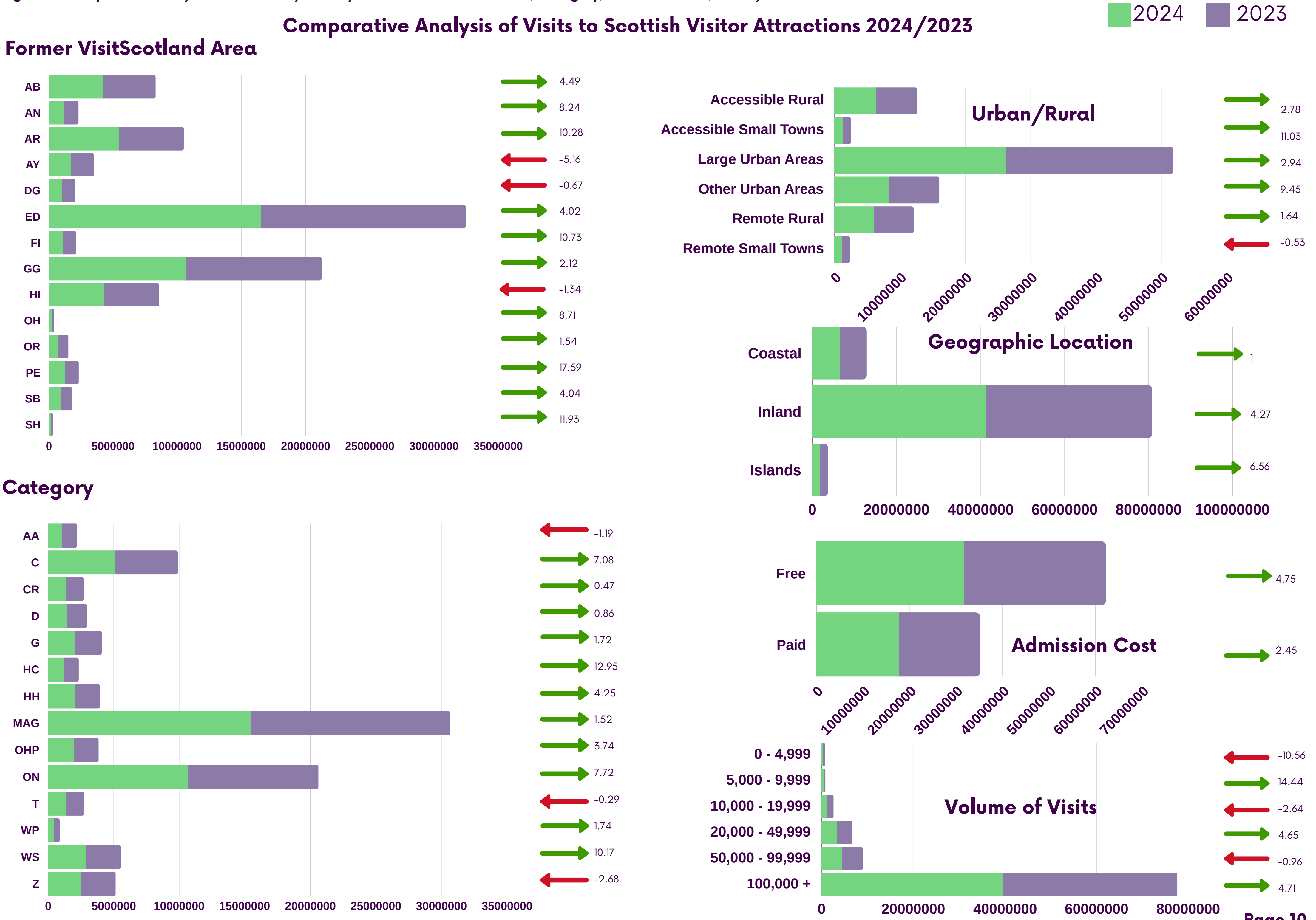


Figure 6 Comparative Analysis of Visits 2024/2023 by: Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location



Monthly Distribution of Visits

Figure 7 Monthly Distribution of Visits (%) by Admission

Monthly Distribution of Visits by Admission 2024/2023

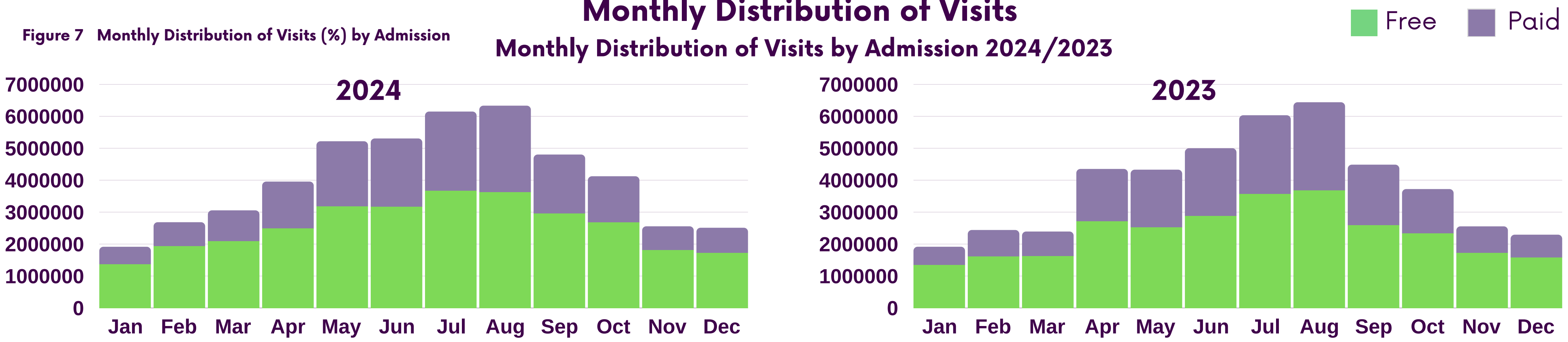
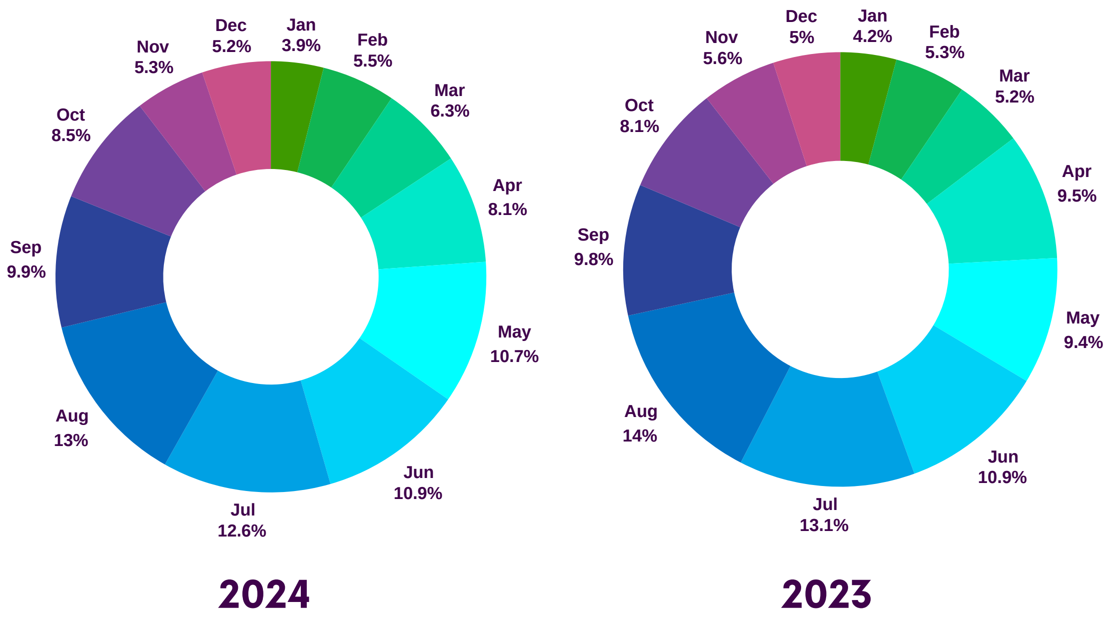
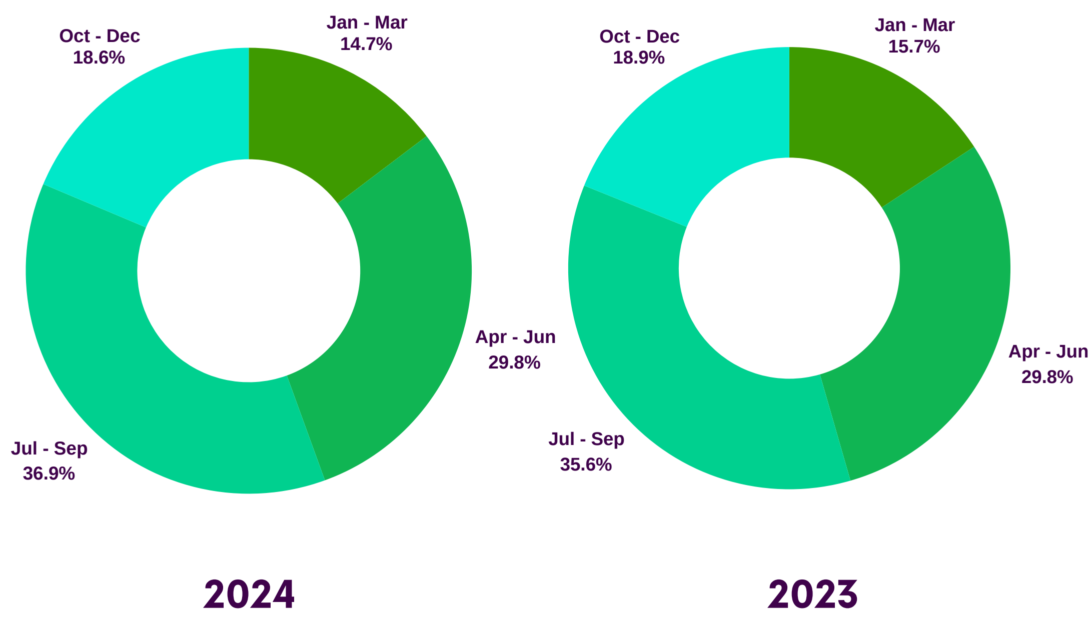


Figure 8 Monthly / Quarterly Distribution of Visits (%)

Monthly Distribution of Visits 2024/2023



Quarterly Distribution of Visits



Distribution of visits remains comparable within the majority of the peak season (July - August) 2024 and 2023.

Just over two-thirds of visits in 2024 took place in quarters two & three of the year, August saw visits peaking similar to that of 2023.

Quarterly Seasonal Analysis

Table 2 Comparative Analysis of Visits 2024/2020 by: Category and Former VisitScotland Area

Quarterly Seasonal Analysis (%) by Attraction Category

2024

Category Short	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec
AA	21.0%	27.6%	34.4%	17.0%
C	12.4%	31.7%	39.7%	16.1%
CR	16.6%	26.7%	31.5%	25.2%
D	12.6%	32.8%	36.3%	18.4%
G	15.7%	32.9%	34.4%	17.1%
HC	10.2%	33.7%	40.1%	16.0%
HH	8.9%	33.3%	43.6%	14.2%
MAG	19.2%	27.1%	33.8%	20.0%
OHP	9.6%	33.3%	41.6%	15.5%
ON	18.2%	30.3%	29.8%	21.7%
T	7.1%	29.9%	45.6%	17.3%
WP	15.4%	31.7%	34.4%	18.4%
WS	12.2%	30.6%	39.7%	17.5%
Z	13.4%	30.1%	39.7%	16.8%

2023

	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec
AA	18.8%	27.7%	35.3%	18.2%
C	10.9%	32.2%	40.6%	16.2%
CR	17.5%	27.9%	31.6%	23.0%
D	11.8%	32.0%	37.5%	18.7%
G	14.0%	31.7%	32.0%	22.2%
HC	8.8%	28.1%	49.0%	14.1%
HH	8.4%	32.1%	46.0%	13.6%
MAG	17.4%	27.2%	35.4%	20.0%
OHP	9.7%	33.3%	42.1%	14.9%
ON	17.1%	30.1%	32.2%	20.5%
T	7.6%	30.8%	44.7%	16.8%
WP	16.0%	31.6%	34.2%	18.2%
WS	11.6%	31.7%	39.5%	17.2%
Z	13.7%	31.7%	39.5%	15.1%

The Museums/Art Galleries category seasonality was noticeably similar to 2023.

The Visitation Analysis identified that Transport attractions saw over 45% of all recorded visits occurring during the third quarter of the year

Quarterly Seasonal Analysis (%) by Former VS Region

2024

VS Region - Short	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec
AB	18.0%	29.3%	33.2%	19.5%
AN	19.1%	28.6%	31.6%	20.6%
AR	11.6%	30.7%	38.8%	18.9%
AY	18.0%	30.5%	33.4%	18.2%
DG	11.8%	31.4%	40.2%	16.6%
ED	17.1%	27.9%	34.4%	20.6%
FI	15.1%	28.2%	38.6%	18.1%
GG	18.5%	29.7%	31.8%	19.9%
HI	7.4%	34.1%	43.6%	14.8%
OH	4.0%	36.3%	48.6%	11.1%
OR	3.7%	37.9%	51.1%	7.3%
PE	25.0%	28.7%	31.5%	14.8%
SB	7.8%	36.9%	43.0%	12.3%
SH	6.8%	40.1%	44.6%	8.5%

2023

	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec
AB	15.7%	29.1%	35.1%	20.1%
AN	16.5%	27.7%	33.8%	22.0%
AR	12.6%	30.3%	39.6%	17.5%
AY	13.5%	32.2%	34.9%	19.4%
DG	8.5%	33.4%	41.3%	16.8%
ED	13.7%	28.6%	36.1%	21.6%
FI	17.6%	28.6%	36.3%	17.5%
GG	16.3%	32.5%	31.2%	20.0%
HI	6.7%	30.0%	49.1%	14.2%
OH	8.5%	29.8%	43.3%	18.4%
OR	2.8%	36.4%	51.4%	9.4%
PE	2.8%	35.8%	53.8%	7.6%
SB	11.8%	34.2%	37.0%	17.0%
SH	5.8%	30.9%	42.5%	20.8%

The Outer Hebrides, Shetland Islands and the Orkney Islands recorded the most marked seasonal pattern, with over 84% of all recorded visits occurring during the second and third quarters.

The Perthshire region saw high seasonal levels of visitors in the first quarter with the Angus & City of Dundee and Edindurgh & Lothian seeing the highest seasonal levels in the fourth quarter.

VISITS 2024

This section analyses visits using the data supplied by attractions that submitted completed questionnaires for 2024. Some 619 operators provided visits figures for 2024. The following tables compare visits performance between both Paid and Free Admission attractions.

Highlights:

· Free Admission attractions welcomed 63.8% of all visits in 2024.

· Over 67% of all participating Greater Glasgow & Clyde Valley attractions are free admission attractions.

· Greater Glasgow & Clyde Valley's free attractions welcomed the highest number of visits at over 9.7 million.

· Attractions welcoming over 100,000+ annual visits welcomed 79.2% of reported visits.

· Free Attractions with 100,000 + annual visits welcomed over 55% of all reported visits to attractions in 2024

· Activity Attractions, Castles/Forts, Distilleries/Breweries/Wineries, Historic Houses/Palaces, Transport-Related and Wildlife/Animal Attractions, remain predominantly paid attractions whilst the reverse is true of Museums/Art Galleries, Outdoors/Nature Attractions, Places of Worship/Spiritual Attractions and Scottish Craft/Retail Attractions.

· Free Attractions in Large Urban areas welcomed 38.3% of all visits, with only 14.6% of visits to Paid Attractions in the equivalent area.

· Free admission Inland Attractions (175) welcomed over half of all visits (55.7%), when compared to Inland Paid Admission Attractions (207) who welcomed just over a quarter pf all visits at 27.4%.

Figure 9 Analysis of Visits 2024 by Admission Policy - Overview

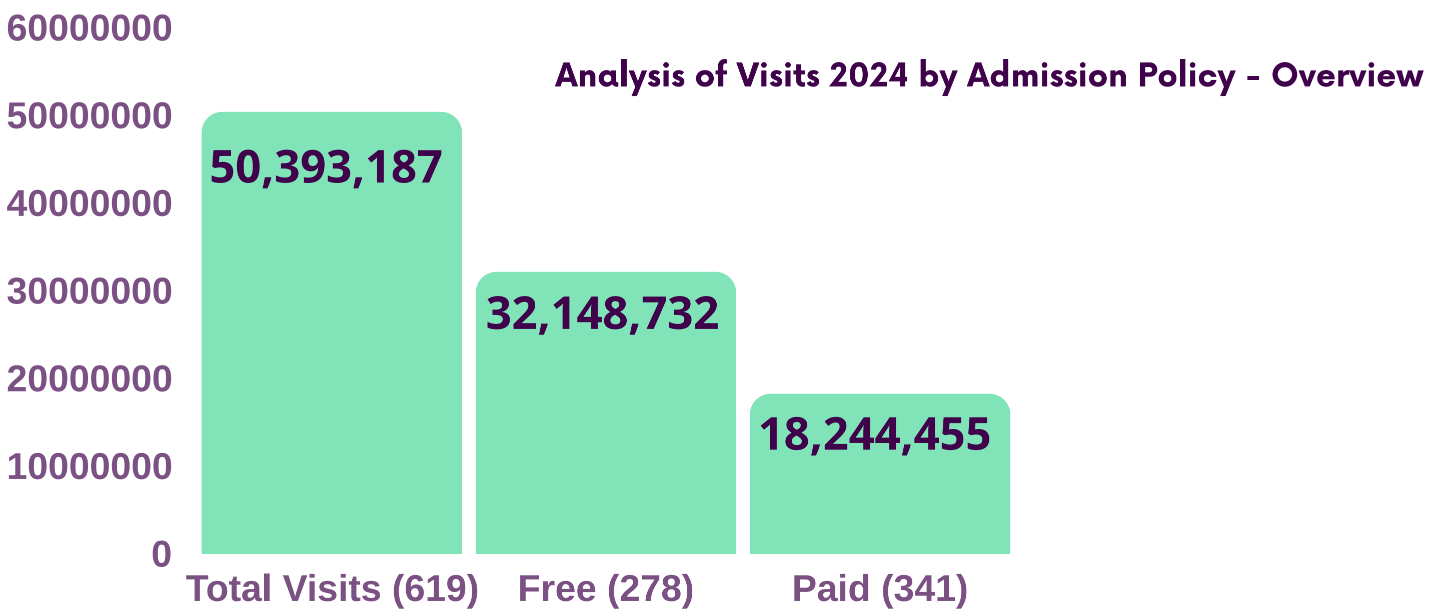
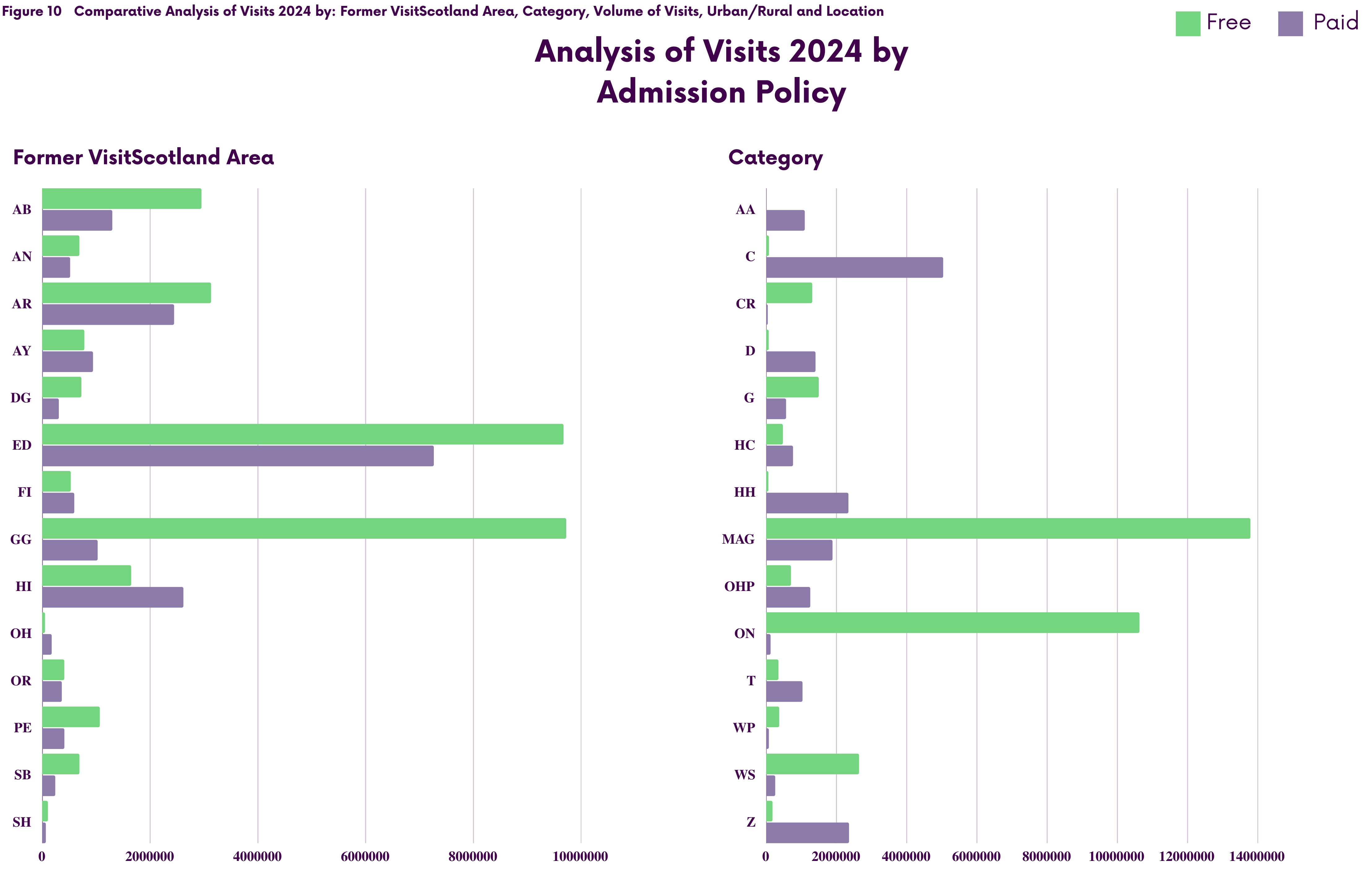


Figure 10 Comparative Analysis of Visits 2024 by: Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location

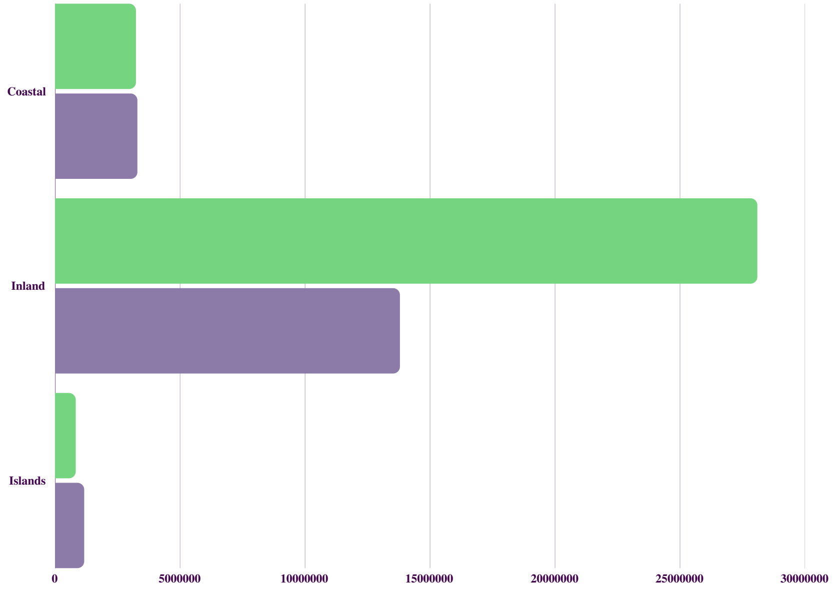
Analysis of Visits 2024 by Admission Policy



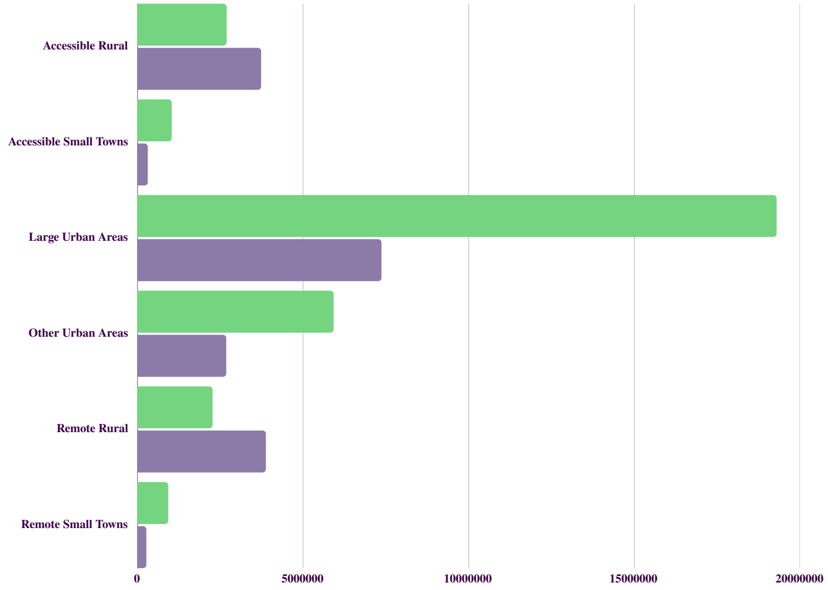
Analysis of Visits 2024 by Admission Policy

Free Paid

Geographic Location



Urban/Rural



Volume of Visits

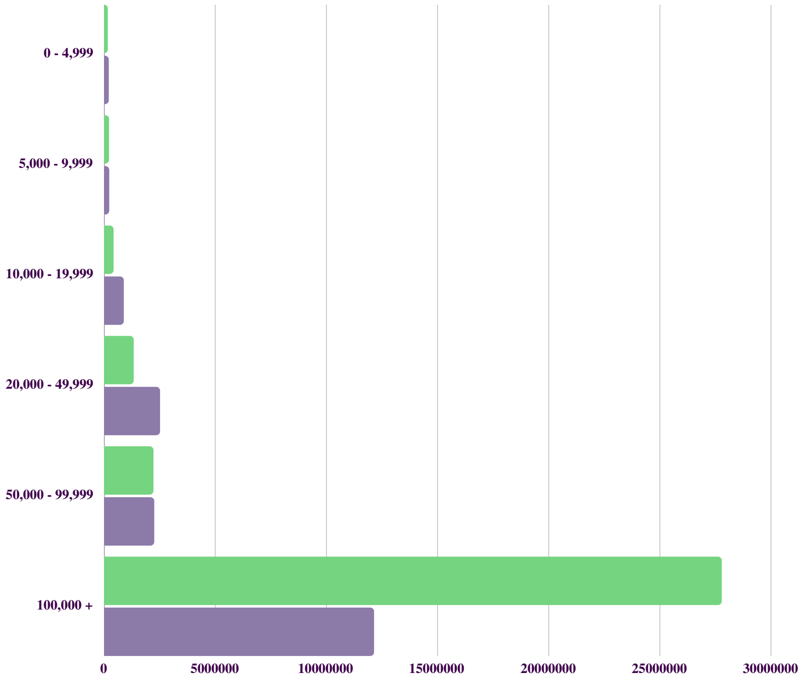
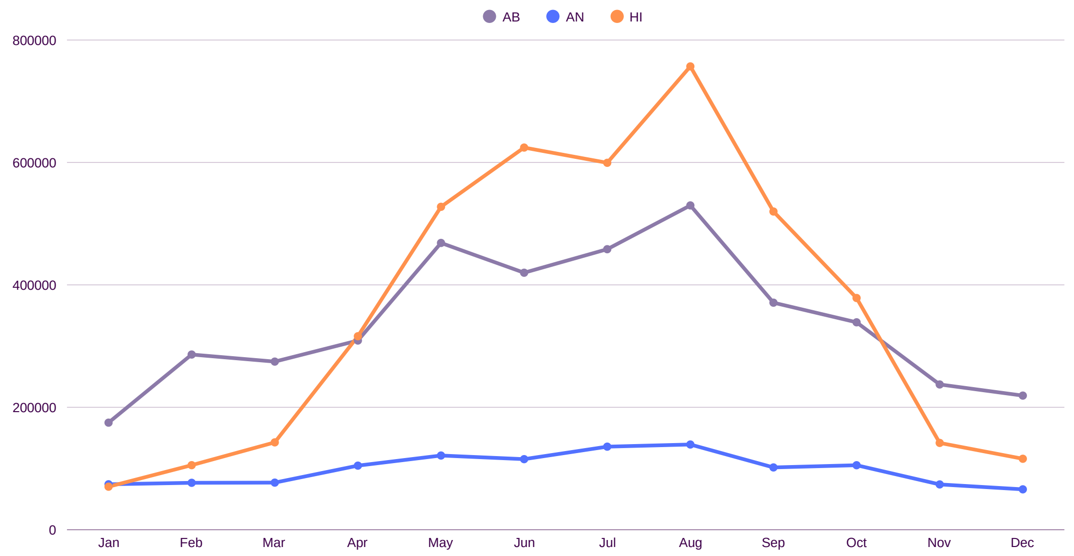
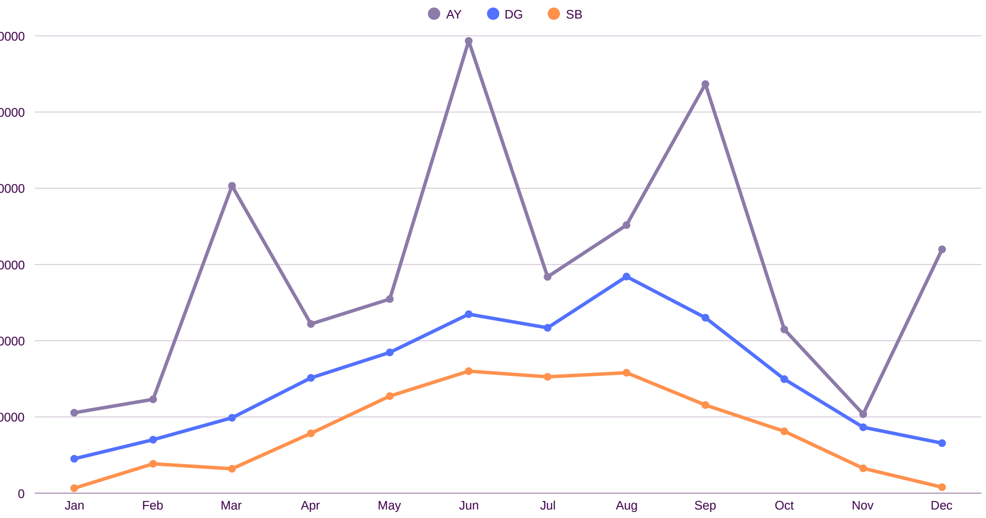


Figure 11 Monthly Visitation Patterns by: Former VisitScotland Area

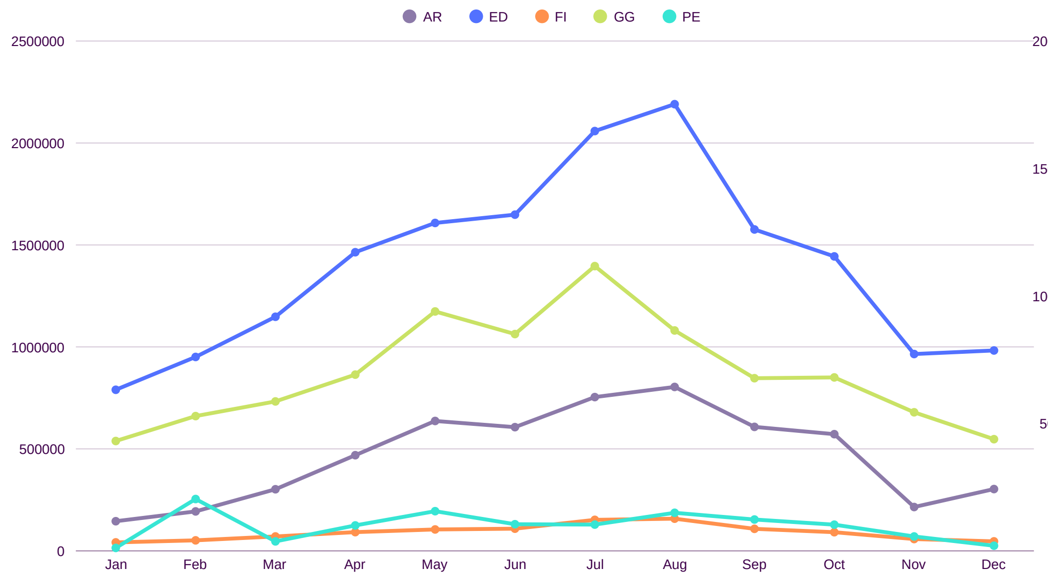
Monthly Visitation Patterns to Aberdeen & Grampian, Angus & the City of Dundee and the Highlands of Scotland



Monthly Visitation Patterns to Ayrshire & Arran, Dumfries & Galloway and the Scottish Borders



Monthly Visitation Patterns to Edinburgh & Lothians and Greater Glasgow & Clyde Valley, Kingdom of Fife, Perthshire and ALLFV



Monthly Visitation Patterns to Orkney, Shetland and the Outer Hebrides

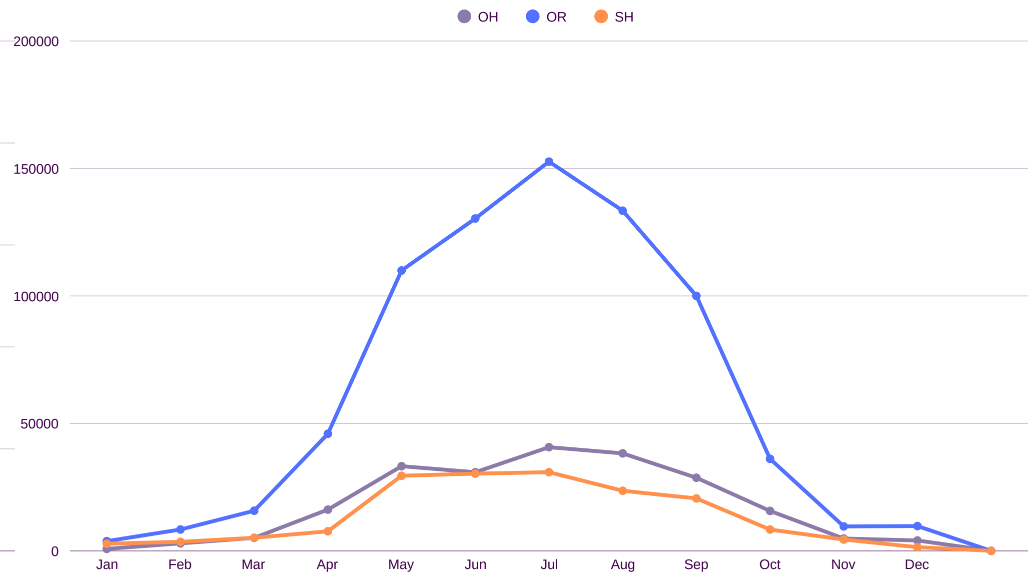
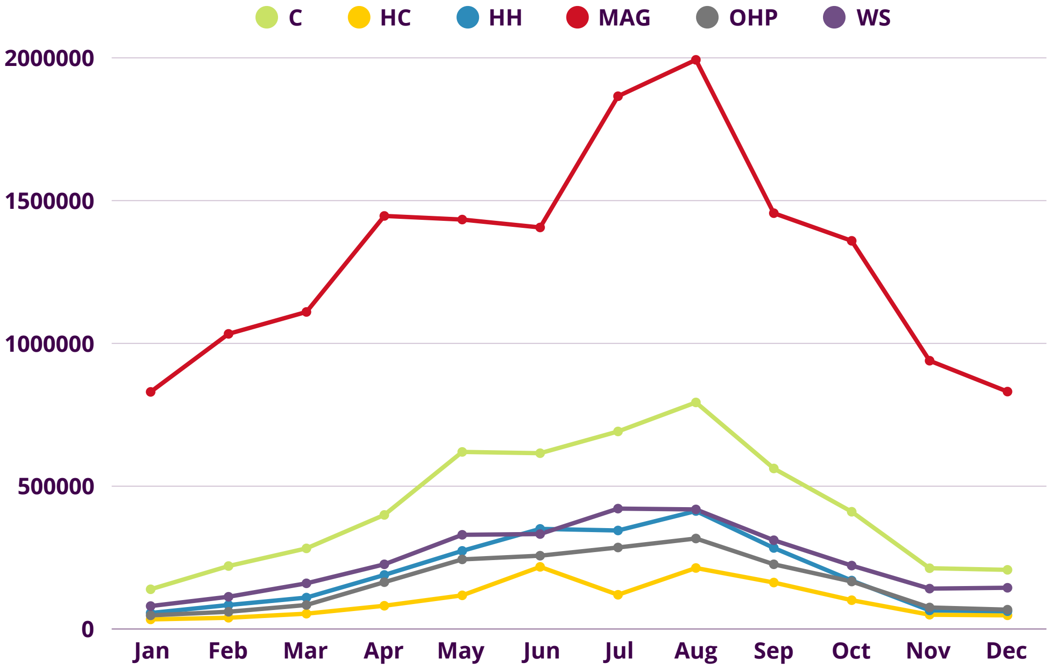
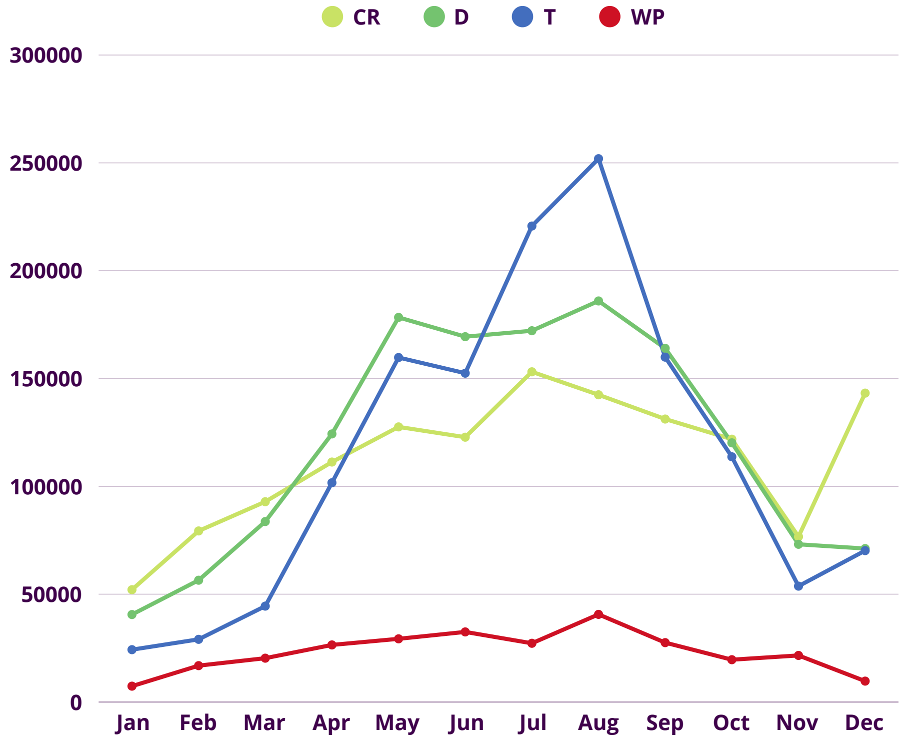


Figure 12 Monthly Visitation Patterns by: Category

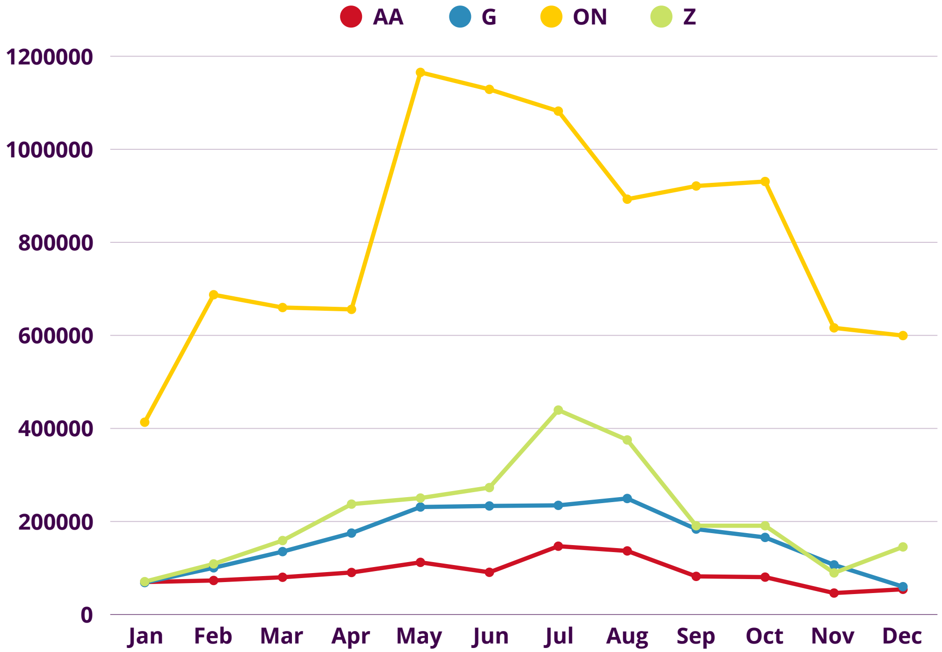
Monthly Visitation Patterns to Heritage-Related Attractions



Monthly Visitation Patterns to Industrial/Workplaces, Retail-Oriented Attractions and Transport-Related Attractions



Monthly Visitation Patterns to Outdoors Attractions



VISITOR PROFILE INFORMATION 2024

Highlights:

- Greater Glasgow welcomed the highest percentage of children in 2024, while Perthshire welcomed the highest proportion of adult visitors.

- Visits to Distilleries/Breweries/Wineries were made predominantly by adults (93.5%), with the Industrial/Workplaces category having the largest percentage of child visits in 2024 at 37.5%.

- Overall, school visits comprised 0.2% of all reported visits to Scottish visitor attractions in 2024.

- Edinburgh & Lothian, Museums/Art Galleries, Large Urban Areas and those attracting 100,000+ visits recorded the greatest number of visits from schools in 2024.

- Angus & City of Dundee, attractions welcoming between 50,000 and 99,999 visits, Accessible Rural and Wildlife/Animal Attractions recorded the greatest proportion of school visits in 2024.

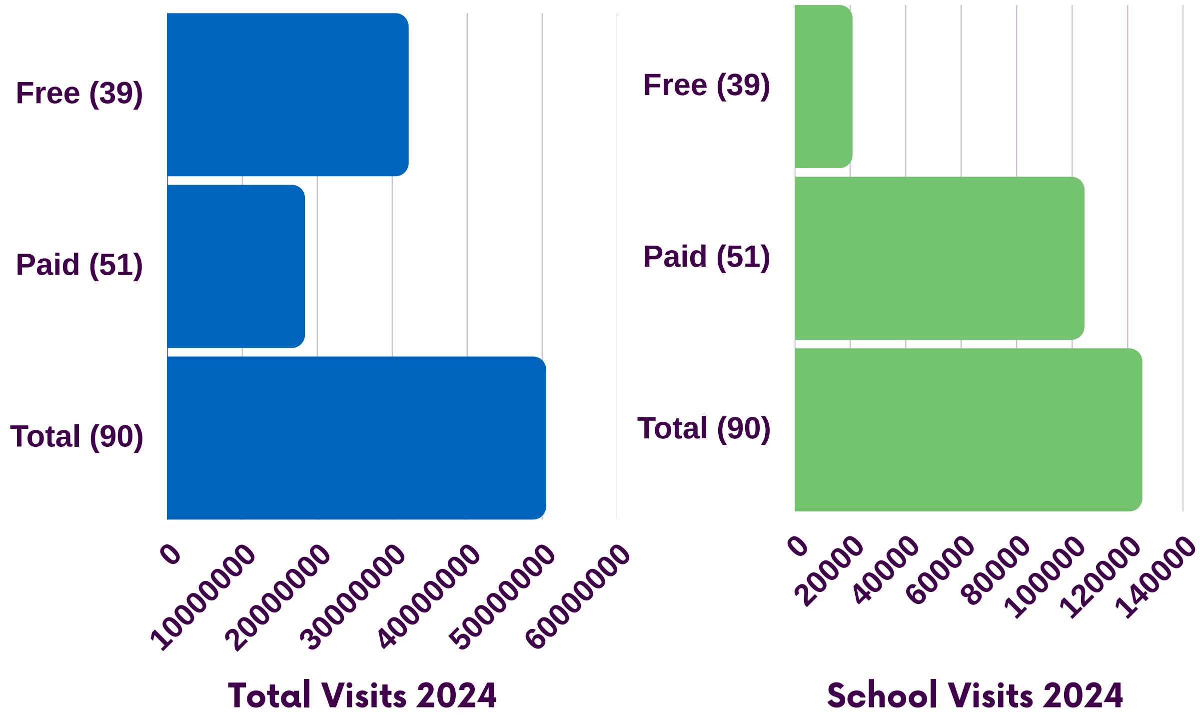
- The Orkney Islands, Places of Worship/Spiritual Attractions, Accessible Small Towns and Island-based Attractions welcomed the greatest proportion of Overseas visits in 2024.

- The Region of Ayrshire & Arran, Outdoors/Nature Attractions, Other Urban Areas and attractions welcoming between 50,000 and 99,000 visits per year received most of their visits from Locals.

- Visitors from England, Northern Ireland and Wales constituted the biggest segment of visitors to attractions in the Dumfries & Galloway Region, in Accessible Small Towns and from the category of Transport-Related Attractions.

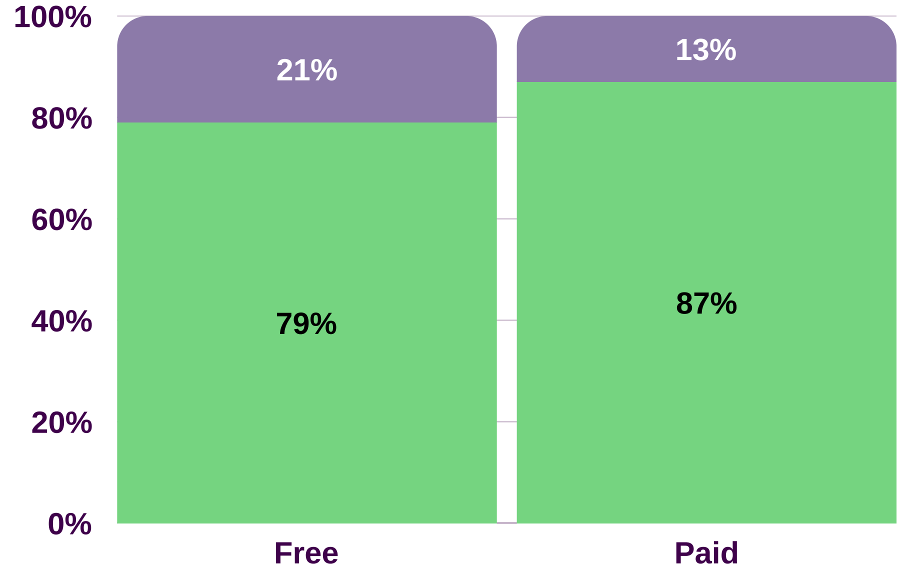
VISITOR PROFILE INFORMATION 2024

Figure 13 School Visits 2024 by: Admission Policy

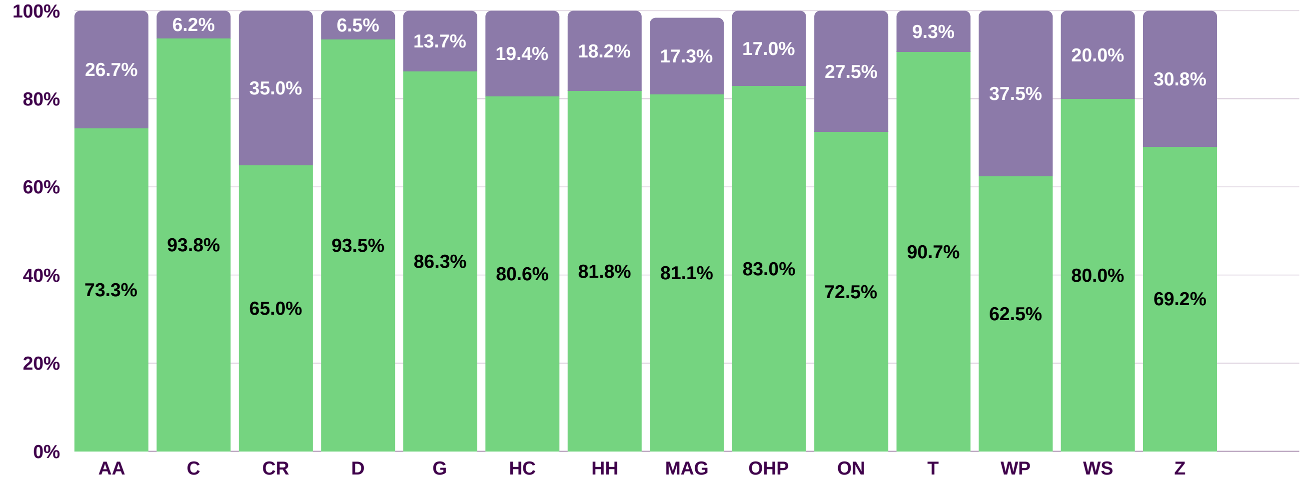


Adult & Child Visitation 2024

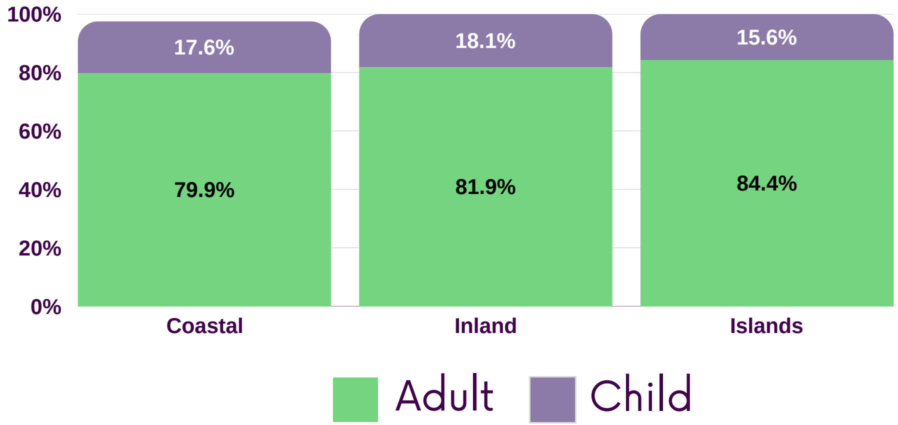
Figure 14 Adult & Child Visitation by: Admission Policy, Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location



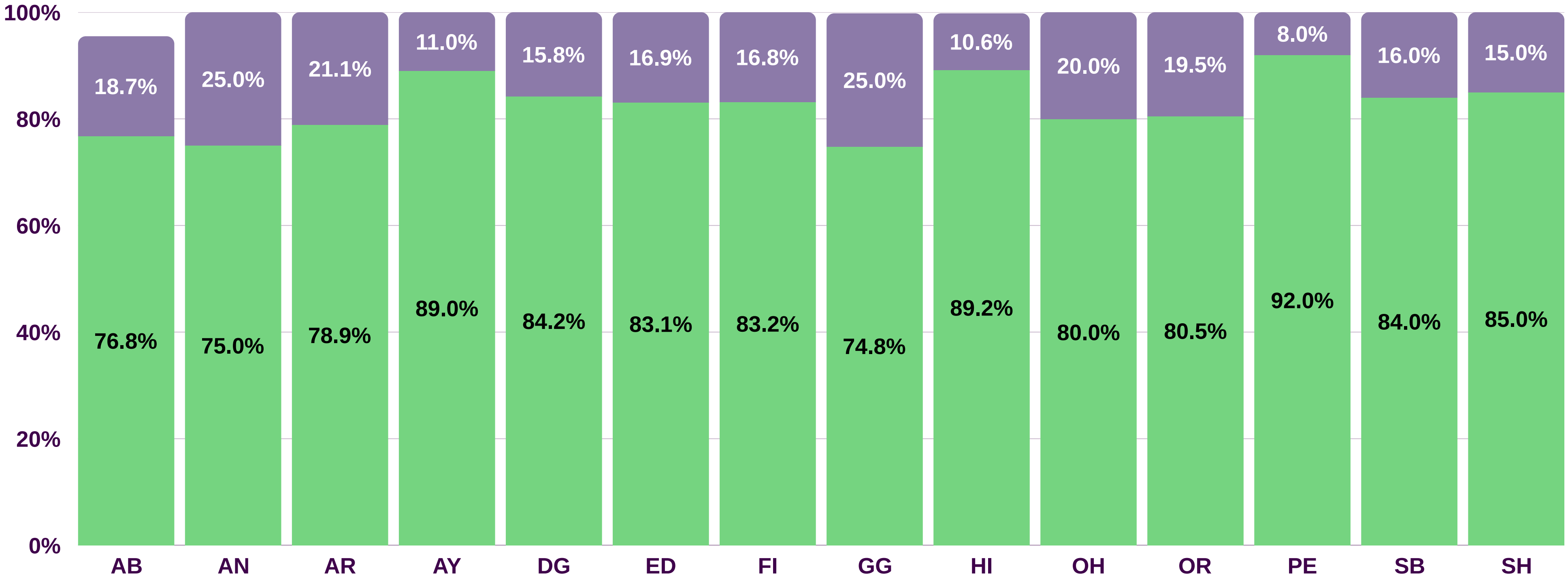
Category



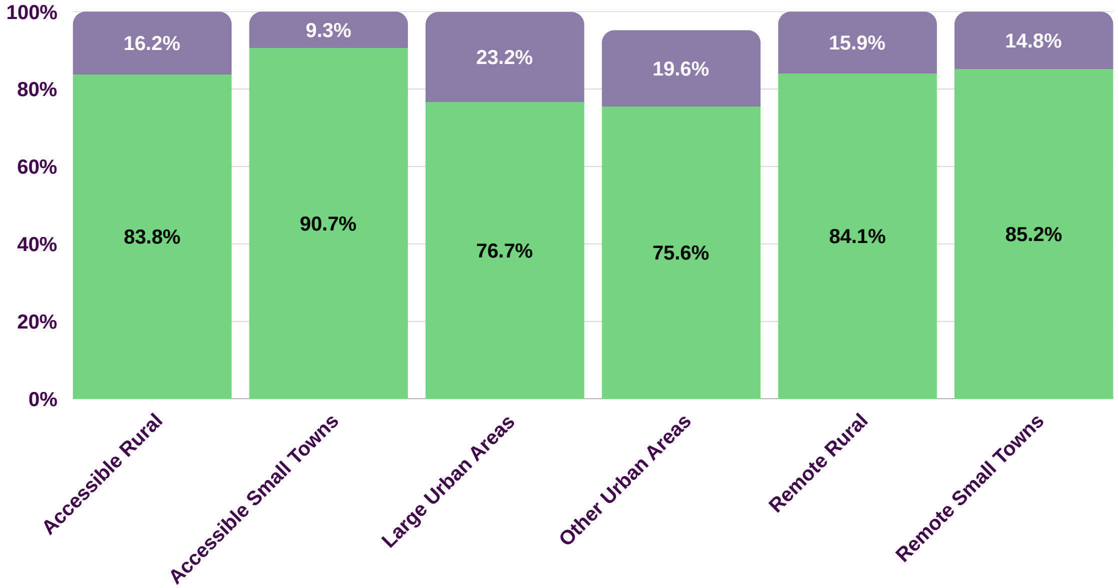
Geographic Location



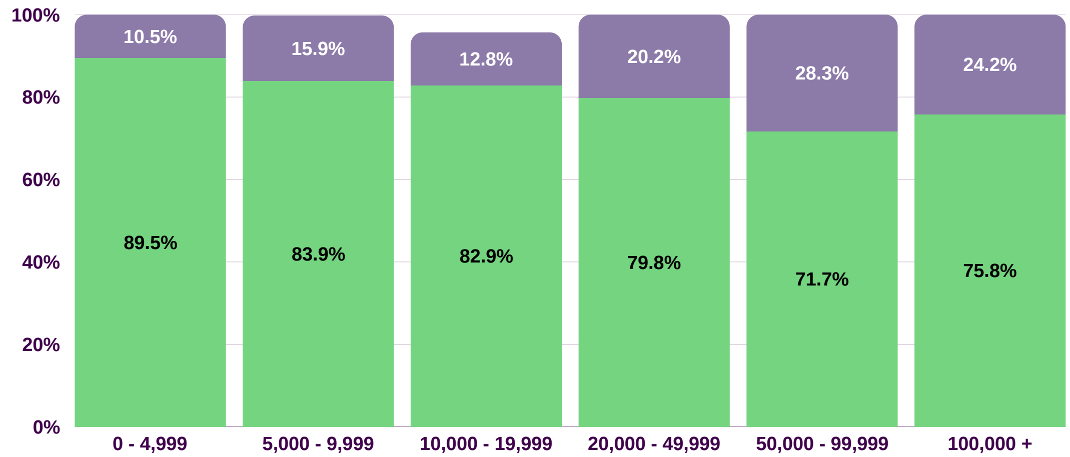
Former VisitScotland Area



Urban/ Rural

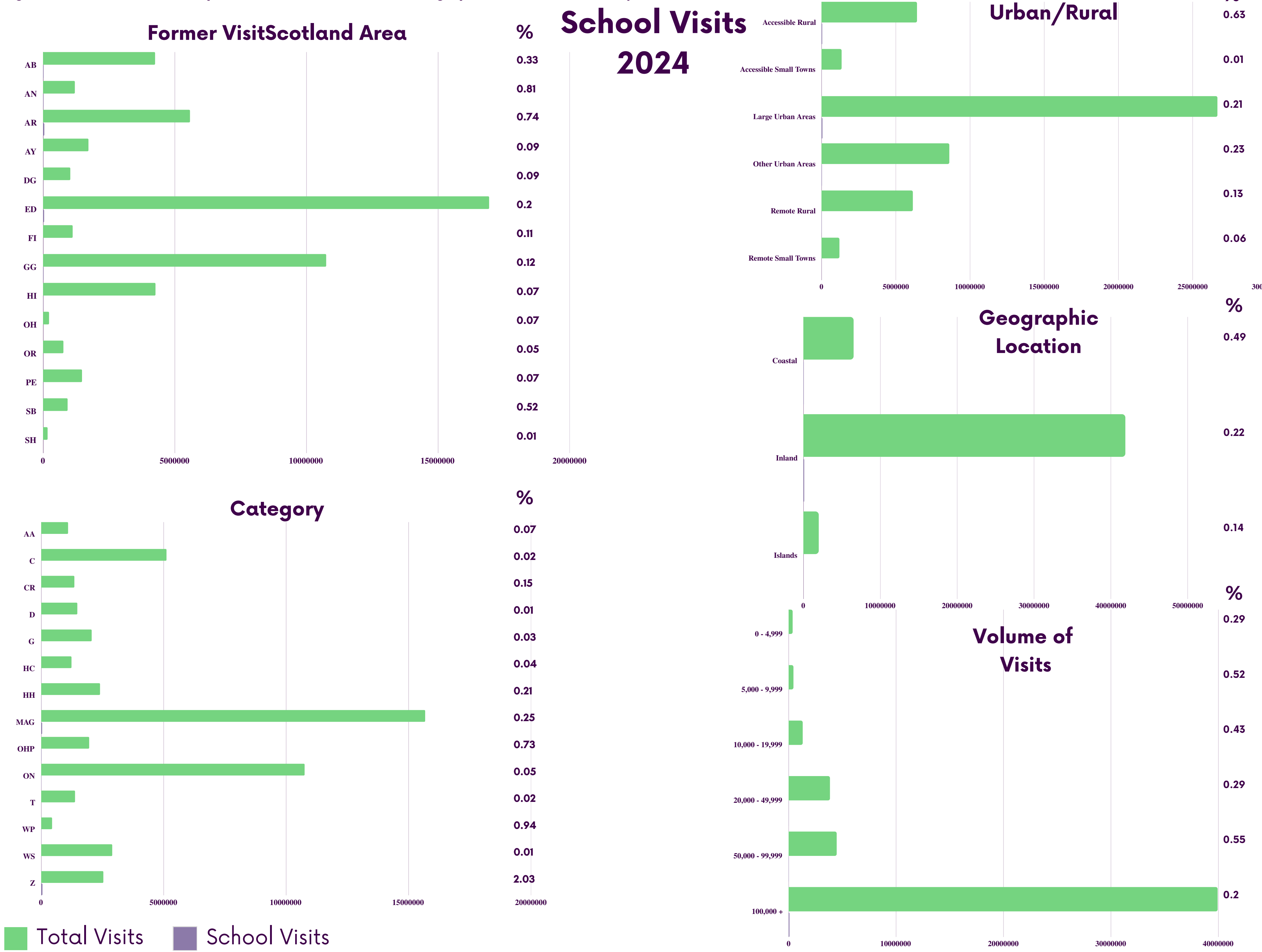


Volume of Visits



Adult Child

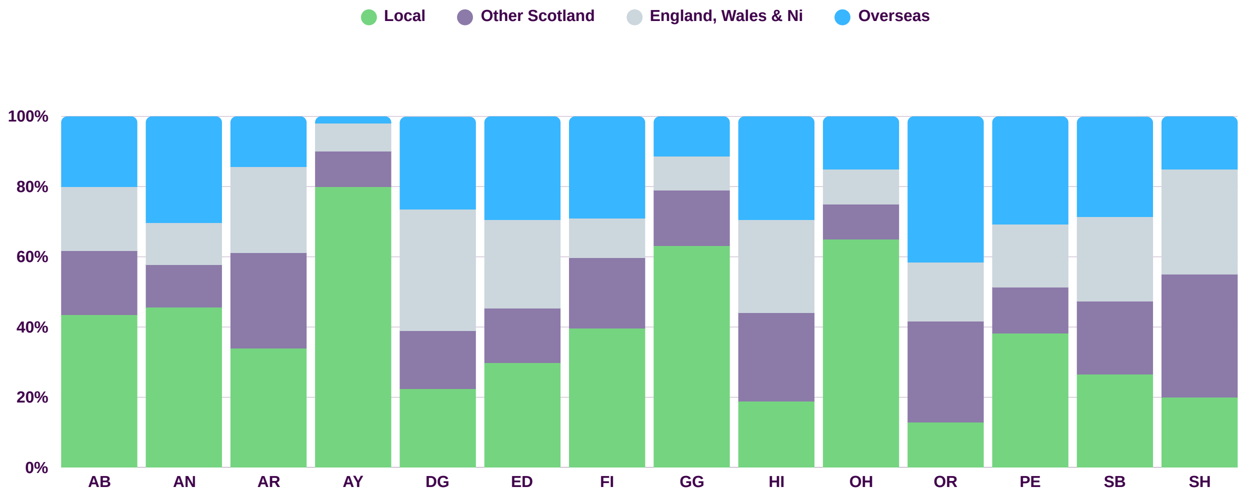
Figure 15 School Visits 2024 by: Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location



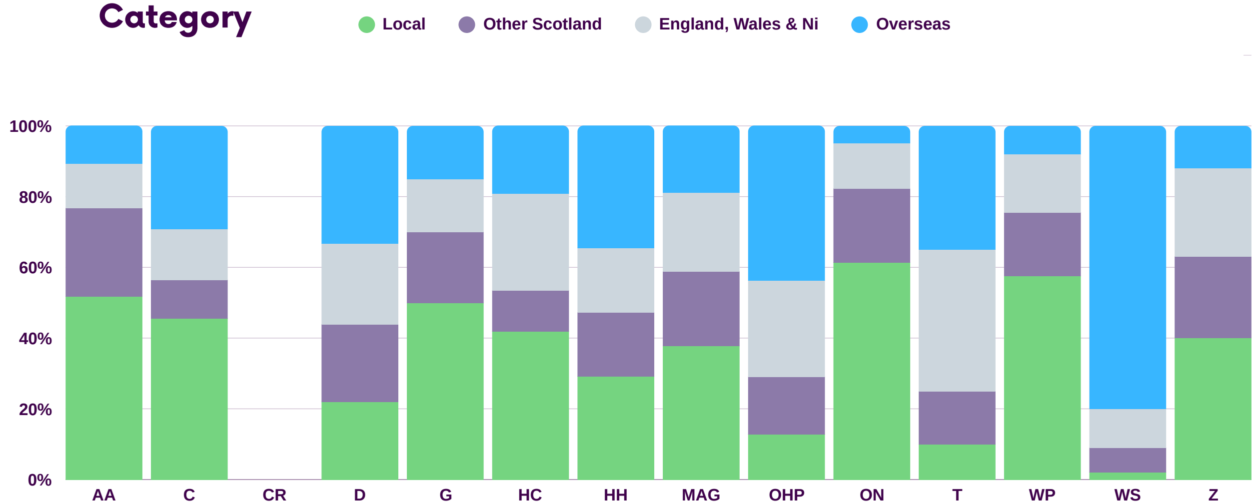
Origin of Visitors 2024

Figure 16 Origin of Visitors (%) 2024 by: Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location

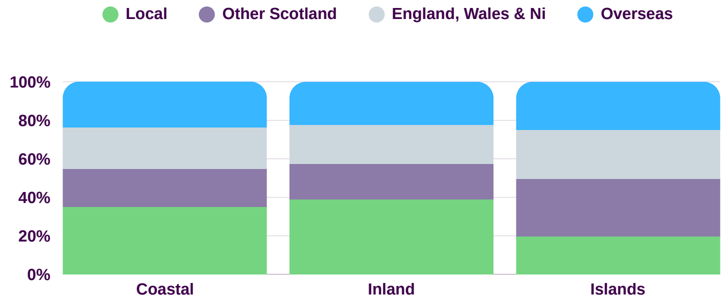
Former VisitScotland Area



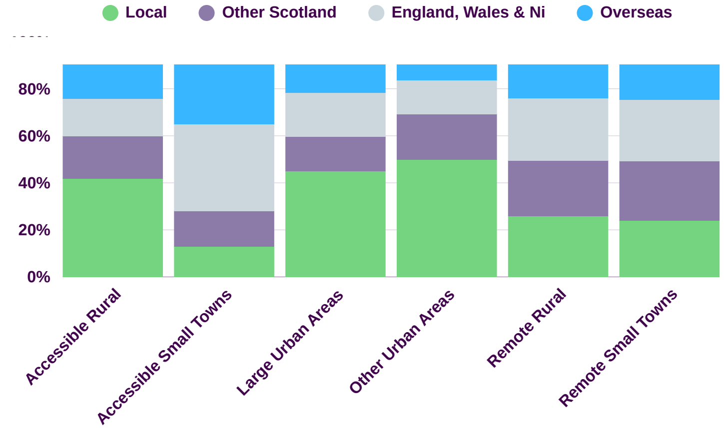
Category



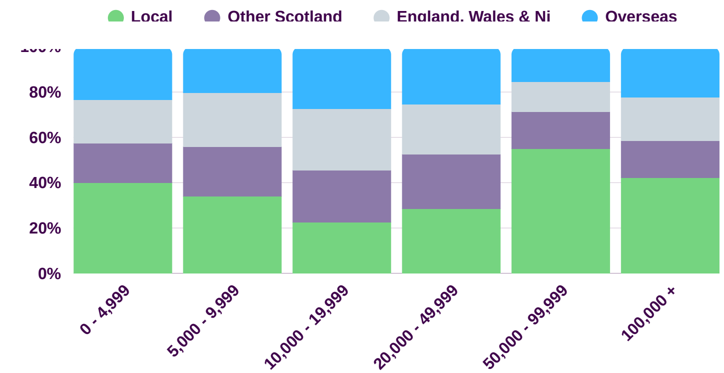
Geographic Location



Urban/Rural



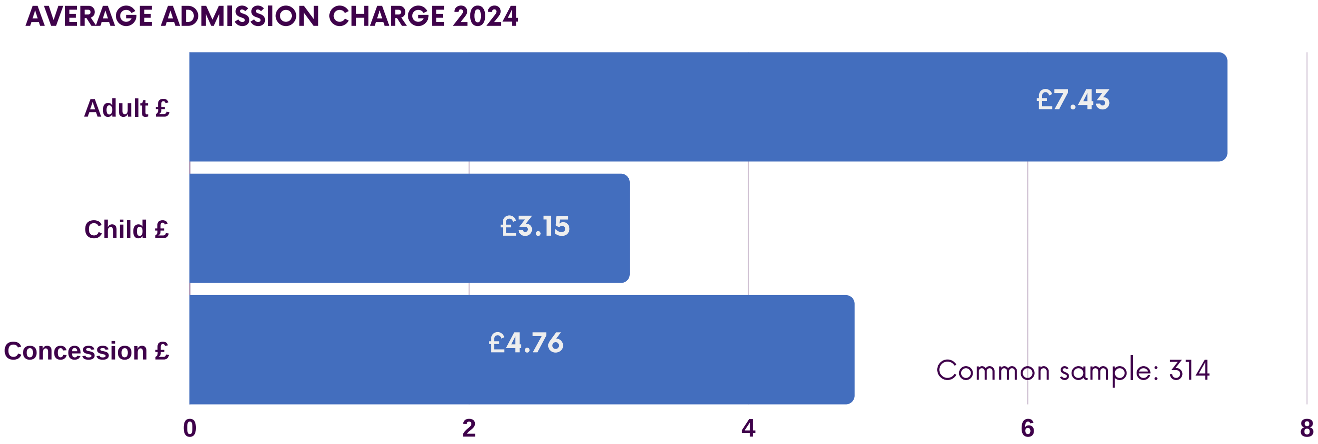
Volume of Visits



Sample = 89

ADMISSIONS CHARGES 2024

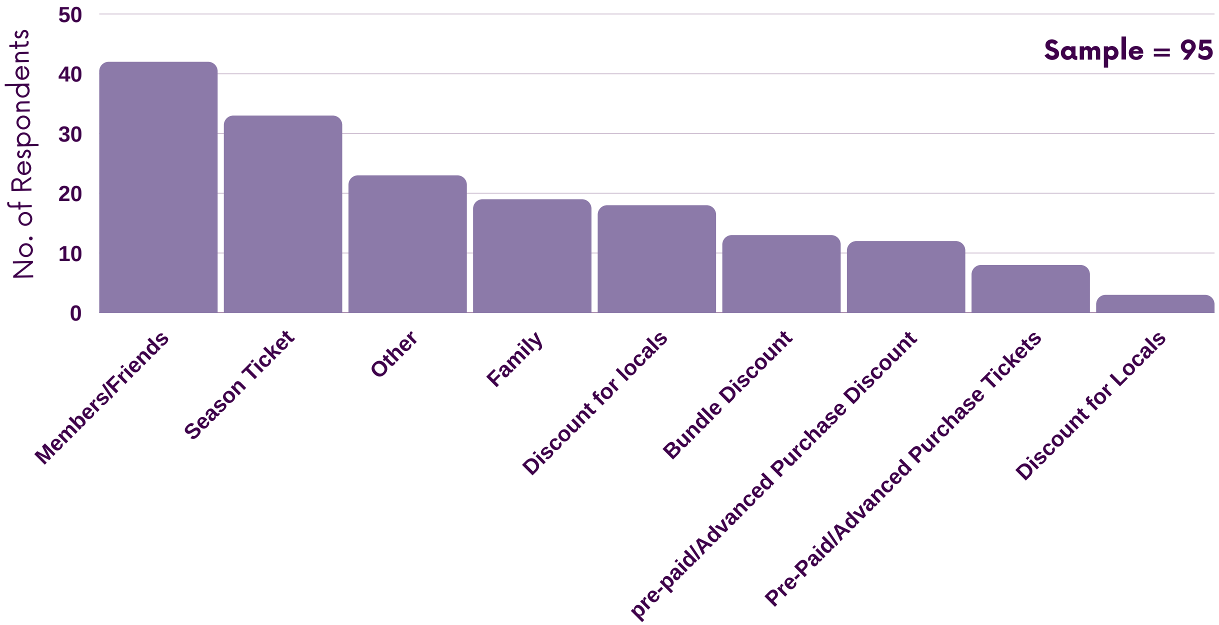
Figure 17 Average Admission Charges 2024



*Based on admission charge to the main element of the attraction. This does not include additional charges such as those for temporary exhibitions or special events.

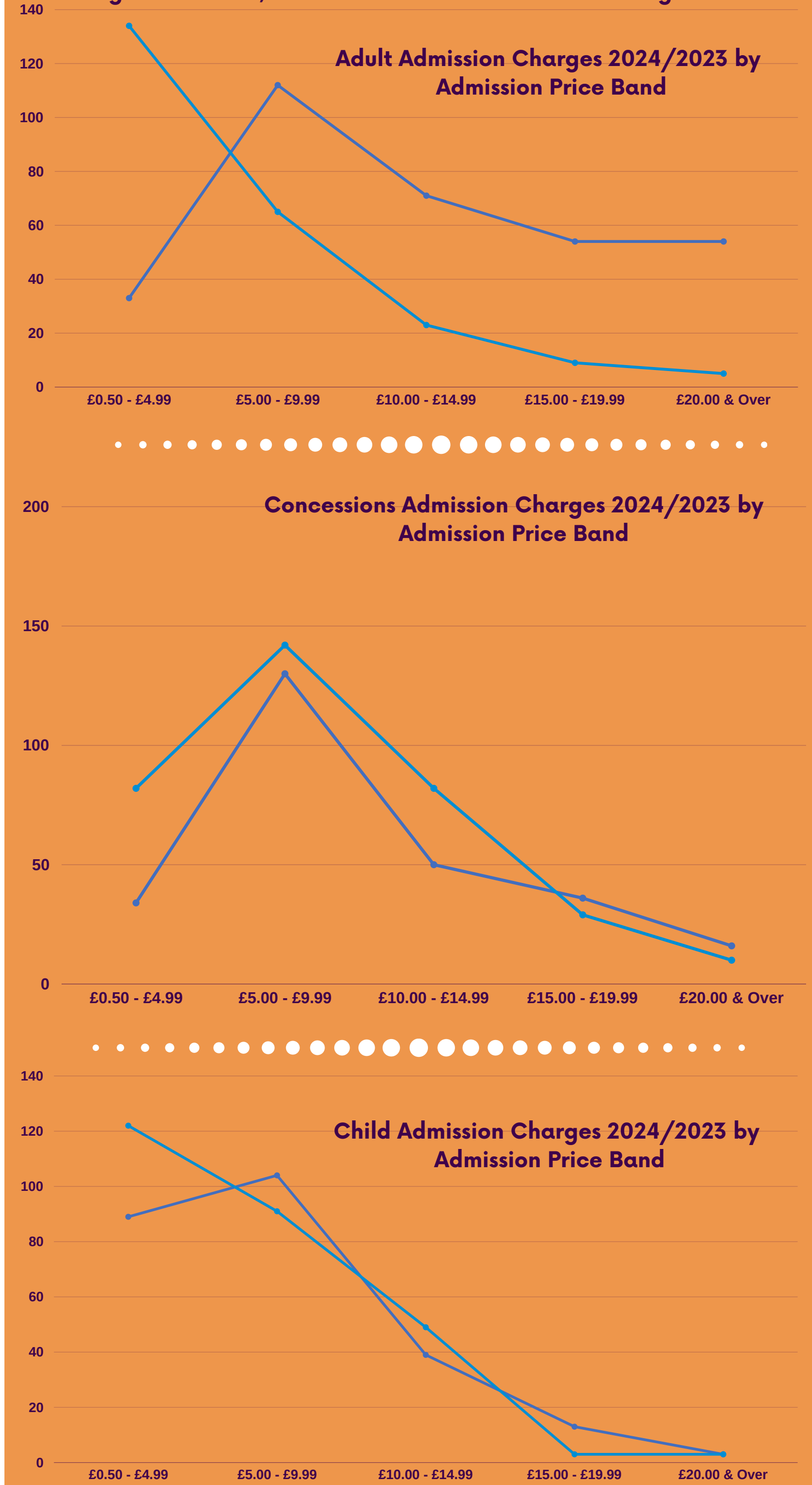
DISCOUNTS OFFERED ON ADMISSION CHARGES

Figure 19 Discounts Offered on Admission Charges 2024



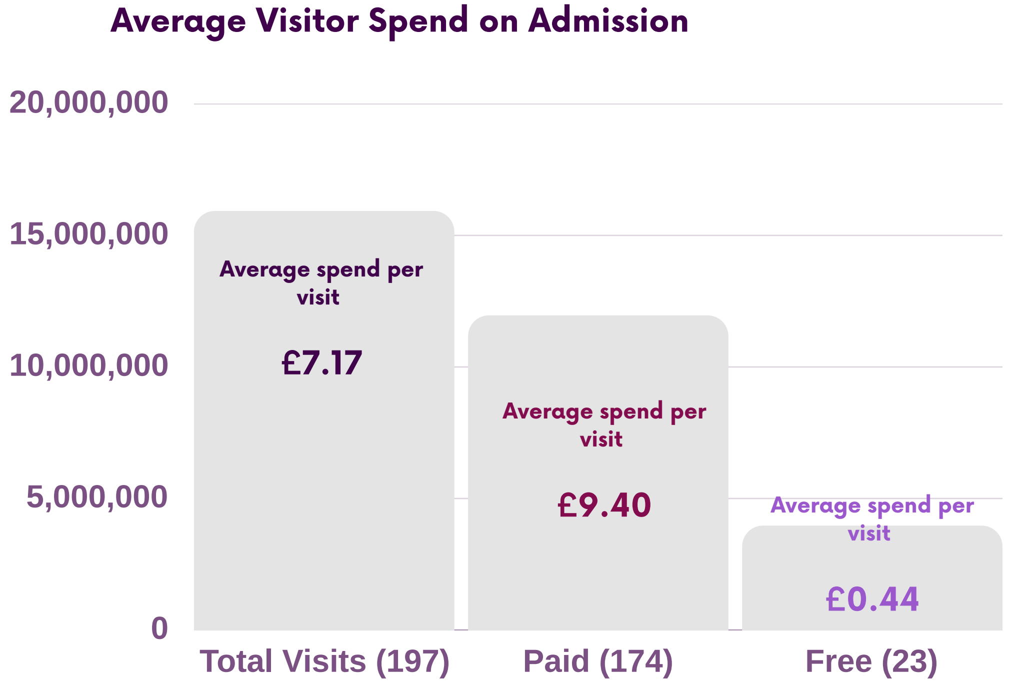
Note: Respondents could select more than one answer, hence total % > 100%

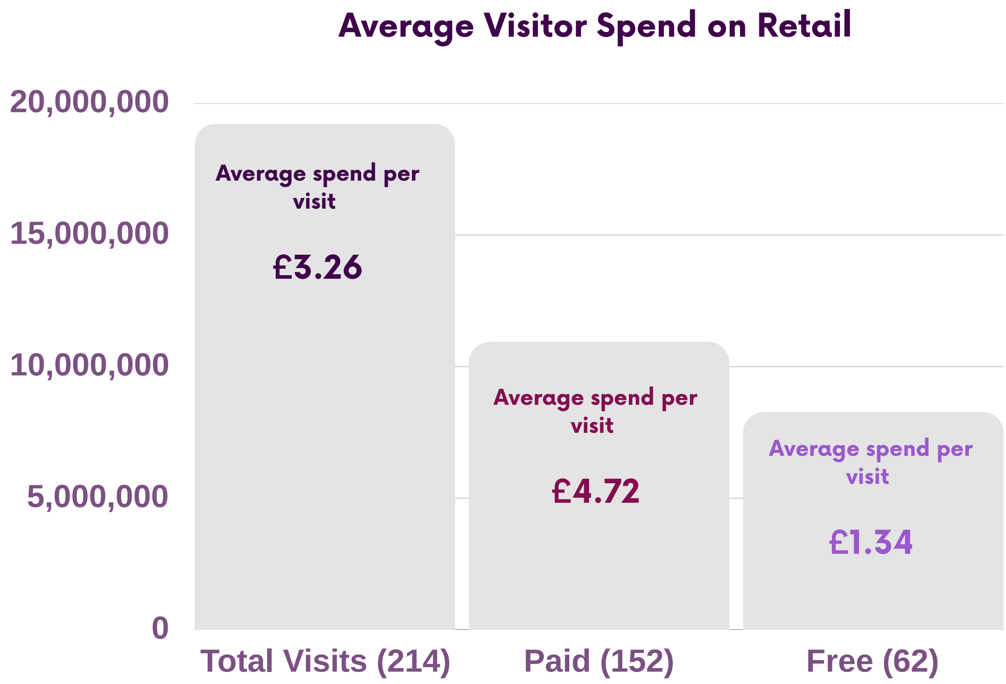
Figure 18 Adult, Concessions & Child Admission Charges 2024

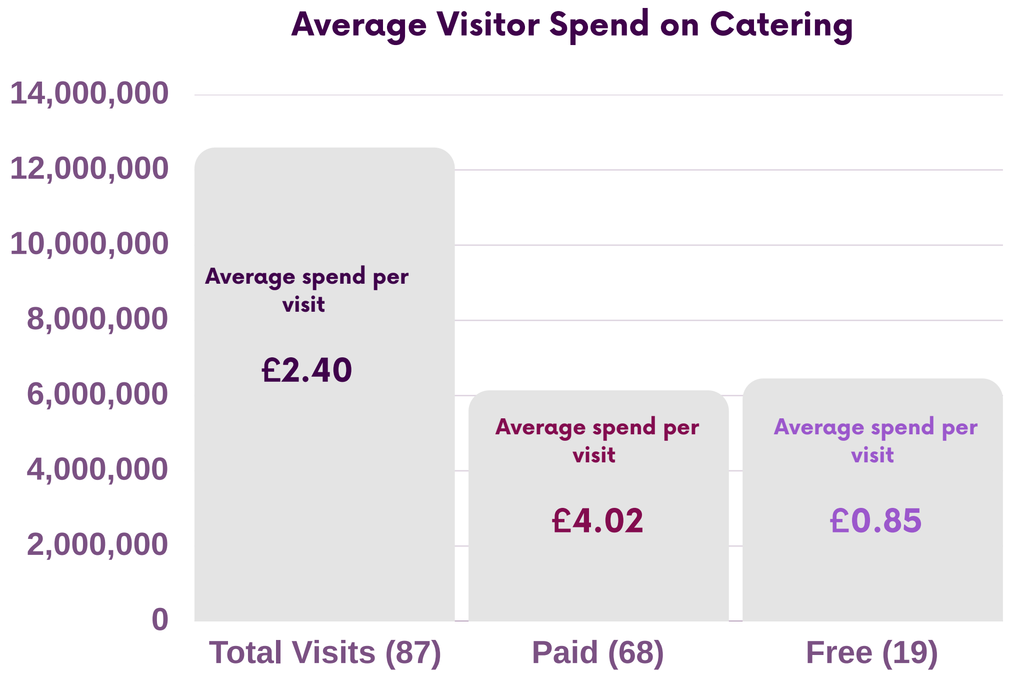


REVENUE OVERVIEW 2024

Figure 20 Average Visitor Spends 2024







Revenue from Admissions 2024

Table 3 Average Visitor Spend on Admissions by Former VisitScotland Area, Volume of Visits, Category, Urban/Rural and Location

Category

Category Short	Count	Total_Visits	Total_Spend	AVG Visitors Per Response	AVG Spend Per Visit
AA	3	1097643	£ 2,562,899.00	365881	£ 2.33
C	41	5115213	£ 35,982,239.24	124761.29	£ 7.03
CR	1	1354522	£ 56,350.00	1354522	£ 0.04
D	21	1474966	£ 11,564,920.05	70236.48	£ 7.84
G	16	2060937	£ 1,323,735.00	128808.56	£ 0.64
HC	5	1237209	£ 1,981,890.41	247441.8	£ 1.60
HH	28	2401992	£ 11,448,504.85	85785.43	£ 4.77
MAG	26	15674660	£ 8,636,181.46	602871.54	£ 0.55
OHP	32	1958708	£ 7,876,767.78	61209.62	£ 4.02
ON	12	10753168	£ 793,101.00	896097.33	£ 0.07
T	3	1381928	£ 17,898,546.00	460642.67	£ 12.95
WP	3	444881	£ 13,347.00	148293.67	£ 0.03
WS	3	2900034	£ 5,362.51	966678	£ -
Z	3	2537328	£ 14,061,575.00	845776	£ 5.54

Former VisitScotland Area

VS Region - Short	Count	Total_Visits	Total_Spend	AVG Visitors Per Response	AVG Spend Per Visit
AB	27	4249121	£ 2,751,818.71	157374.85	£ 0.65
AN	8	1201206	£ 1,619,136.52	150150.75	£ 1.35
AR	31	5574610	£ 17,650,148.99	179826.13	£ 3.17
AY	5	1717938	£ 801,411.79	343587.6	£ 0.47
DG	17	1028561	£ 624,227.68	60503.59	£ 0.61
ED	28	16936703	£ 64,236,623.13	604882.25	£ 3.79
FI	11	1118479	£ 1,441,262.25	101679.91	£ 1.29
GG	11	10747689	£ 4,283,496.71	977062.64	£ 0.40
HI	20	4264439	£ 17,095,804.75	213221.95	£ 4.01
OH	3	221315	£ 74,402.96	73771.67	£ 0.34
OR	7	766933	£ 899,813.14	109561.86	£ 1.17
PE	14	1473638	£ 1,895,026.98	105259.86	£ 1.29
SB	12	926267	£ 736,110.64	77188.92	£ 0.79
SH	3	166290	£ 96,135.05	55430	0.58

Urban/Rural

urbanruralnew	Count	Total_Visits	Total_Spend	AVG Visitors Per Response	AVG Spend Per Visit
Accessible Rural	49	6427264	£ 19,559,396.90	131168.65	£ 3.04
Accessible Small Towns	8	1347783	£ 518,716.25	168472.88	£ 0.38
Large Urban Areas	33	26667009	£ 67,912,475.21	808091.18	£ 2.55
Other Urban Areas	27	8603930	£ 8,544,525.88	318664.07	£ 0.99
Remote Rural	69	6146758	£ 16,365,411.09	89083.45	£ 2.66
Remote Small Towns	11	1200445	£ 1,304,893.97	109131.36	£ 1.09

Volume of Visits

volume_of_visits	Count	Total_Visits	Total_Spend	AVG Visitors Per Response	AVG Spend Per Visit
0 - 4,999	51	376812	£ 731,784.21	7388.47	£ 1.94
10,000 - 19,999	35	1312472	£ 3,347,193.11	37499.2	£ 2.55
100,000 +	34	39927964	£ 92,006,302.54	1174351.88	£ 2.30
20,000 - 49,999	42	3849223	£ 9,453,164.93	91648.17	£ 2.46
5,000 - 9,999	14	450895	£ 681,540.14	32206.79	£ 1.51
50,000 - 99,999	21	4475823	£ 7,985,434.37	213134.43	£ 1.78

Geographic Location

Location	Count	Total_Visits	Total_Spend	AVG Visitors Per Response	AVG Spend Per Visit
Coastal	47	6521769	£ 12,284,963.68	138761.04	£ 1.88
Inland	128	41887093	£ 95,353,566.02	327242.91	£ 2.28
Islands	22	1984327	£ 6,566,889.60	90196.68	£ 3.31

Revenue from Retail 2024

Table 4 Average Visitor Spend on Retail by Former VisitScotland Area, Volume of Visits, Category, Urban/Rural and Location

Category

Category Short	Count	Total_Visits	Total_Spend	AVG Retail	AVG Spend Per Visit
AA	2	1097643	£ 111,965.00	548821.5	£ 0.10
C	39	5115213	£ 13,399,018.79	131159.31	£ 2.62
CR	1	1354522	£ 287,323.00	1354522	£ 0.21
D	20	1474966	£ 23,579,350.14	73748.3	£ 15.99
G	9	2060937	£ 676,518.00	228993	£ 0.33
HC	6	1237209	£ 6,724,015.35	206201.5	£ 5.43
HH	28	2401992	£ 3,673,380.75	85785.43	£ 1.53
MAG	61	15674660	£ 3,779,007.83	256961.64	£ 0.24
OHP	29	1958708	£ 3,707,097.34	67541.66	£ 1.89
ON	7	10753168	£ 2,500,819.00	1536166.86	£ 0.23
T	2	1381928	£ 796,701.00	690964	£ 0.58
WP	3	444881	£ 17,813.00	148293.67	£ 0.04
WS	3	2900034	£ 143,893.23	966678	£ 0.05
Z	5	2537328	£ 3,254,928.50	507465.6	£ 1.28

Former VisitScotland Area

VS Region - Short	Count	Total_Visits	Total_Spend	AVG Retail	AVG Spend Per Visit
AB	28	4249121	£ 3,559,787.71	151754.32	£ 0.84
AN	8	1201206	£ 724,115.13	150150.75	£ 0.60
AR	29	5574610	£ 10,633,685.16	192227.93	£ 1.91
AY	7	1717938	£ 858,603.80	245419.71	£ 0.50
DG	21	1028561	£ 4,576,028.24	48979.1	£ 4.45
ED	26	16936703	£ 19,115,248.51	651411.65	£ 1.13
FI	12	1118479	£ 1,158,873.64	93206.58	£ 1.04
GG	18	10747689	£ 2,373,707.51	597093.83	£ 0.22
HI	22	4264439	£ 15,056,466.49	193838.14	£ 3.53
OH	2	221315	£ 37,728.08	110657.5	£ 0.17
OR	7	766933	£ 864,347.32	109561.86	£ 1.13
PE	14	1473638	£ 3,159,333.91	105259.86	£ 2.14
SB	16	926267	£ 282,275.09	57891.69	£ 0.30
SH	5	166290	£ 251,630.34	33258	1.51

Urban/Rural

urbanruralnew	Count	Total_Visits	Total_Spend	AVG Retail	AVG Spend Per Visit
Accessible Rural	45	6427264	£ 6,664,883.46	142828.09	£ 1.04
Accessible Small Towns	13	1347783	£ 1,270,303.09	103675.62	£ 0.94
Large Urban Areas	37	26667009	£ 21,153,553.16	720729.97	£ 0.79
Other Urban Areas	38	8603930	£ 6,844,793.39	226419.21	£ 0.80
Remote Rural	66	6146758	£ 19,642,357.13	93132.7	£ 3.20
Remote Small Towns	16	1200445	£ 7,075,940.70	75027.81	£ 5.89

Volume of Visits

volume_of_visits	Count	Total_Visits	Total_Spend	AVG Retail	AVG Spend Per Visit
0 - 4,999	54	376812	£ 1,277,941.25	6978	£ 3.39
10,000 - 19,999	38	1312472	£ 5,283,205.57	34538.74	£ 4.03
100,000 +	35	39927964	£ 37,808,862.44	1140798.97	£ 0.95
20,000 - 49,999	41	3849223	£ 14,291,818.10	93883.49	£ 3.71
5,000 - 9,999	22	450895	£ 1,523,529.71	20495.23	£ 3.38
50,000 - 99,999	25	4475823	£ 2,466,473.86	179032.92	£ 0.55

Geographic Location

Location	Count	Total_Visits	Total_Spend	AVG Retail	AVG Spend Per Visit
Coastal	52	6521769	£ 8,151,372.25	125418.63	£ 1.25
Inland	141	41887093	£ 46,497,089.76	297071.58	£ 1.11
Islands	22	1984327	£ 8,003,368.92	90196.68	£ 4.03

Revenue from Catering 2024

Table 5 Average Visitor Spend on Catering by Former VisitScotland Area, Volume of Visits, Category, Urban/Rural and Location

Category

Category Short	Count	Total_Visits	Total_Spend	AVG Catering	AVG Spend Per Visit
AA	3	1097643	£ 1,243,203.00	365881	£ 1.13
C	10	5115213	£ 2,755,156.00	511521.3	£ 0.54
CR	1	1354522	£ 1,024,194.00	1354522	£ 0.76
D	16	1474966	£ 4,783,195.62	92185.38	£ 3.24
G	9	2060937	£ 1,090,337.00	228993	£ 0.53
HC	4	1237209	£ 2,253,444.00	309302.25	£ 1.82
HH	14	2401992	£ 3,402,423.00	171570.86	£ 1.42
MAG	15	15674660	£ 1,542,180.69	1044977.33	£ 0.10
OHP	4	1958708	£ 1,726,746.00	489677	£ 0.88
ON	4	10753168	£ 1,804,785.00	2688292	£ 0.17
T	2	1381928	£ 2,420,294.00	690964	£ 1.75
WP	2	444881	£ 6,810.00	222440.5	£ 0.02
WS	0	2900034	£ -	0	£ -
Z	3	2537328	£ 6,136,978.00	845776	£ 2.42

Former VisitScotland Area

VS Region - Short	Count	Total_Visits	Total_Spend	AVG Catering	AVG Spend Per Visit
AB	15	4249121	£ 1,944,855.68	283274.73	£ 0.46
AN	4	1201206	£ 776,541.00	300301.5	£ 0.65
AR	11	5574610	£ 4,247,835.95	506782.73	£ 0.76
AY	3	1717938	£ 1,794,587.00	572646	£ 1.04
DG	5	1028561	£ 1,359,097.00	205712.2	£ 1.32
ED	10	16936703	£ 9,295,647.48	1693670.3	£ 0.55
FI	6	1118479	£ 514,290.00	186413.17	£ 0.46
GG	10	10747689	£ 2,729,230.69	1074768.9	£ 0.25
HI	14	4264439	£ 6,175,992.70	304602.79	£ 1.45
OH	0	221315	£ -	0	£ -
OR	0	766933	£ -	0	£ -
PE	7	1473638	£ 1,323,364.81	210519.71	£ 0.90
SB	0	926267	£ -	0	£ -
SH	2	166290	£ 28,304.00	83145	£ 0.17

Urban/Rural

urbanruralnew	Count	Total_Visits	Total_Spend	AVG Catering	AVG Spend Per Visit
Accessible Rural	20	6427264	£ 7,061,502.51	321363.2	£ 1.10
Accessible Small Towns	1	1347783	£ 242,775.00	1347783	£ 0.18
Large Urban Areas	20	26667009	£ 12,074,252.46	1333350.45	£ 0.45
Other Urban Areas	10	8603930	£ 3,485,233.00	860393	£ 0.41
Remote Rural	31	6146758	£ 6,091,227.64	198282.52	£ 0.99
Remote Small Towns	5	1200445	£ 1,234,755.70	240089	£ 1.03

Volume of Visits

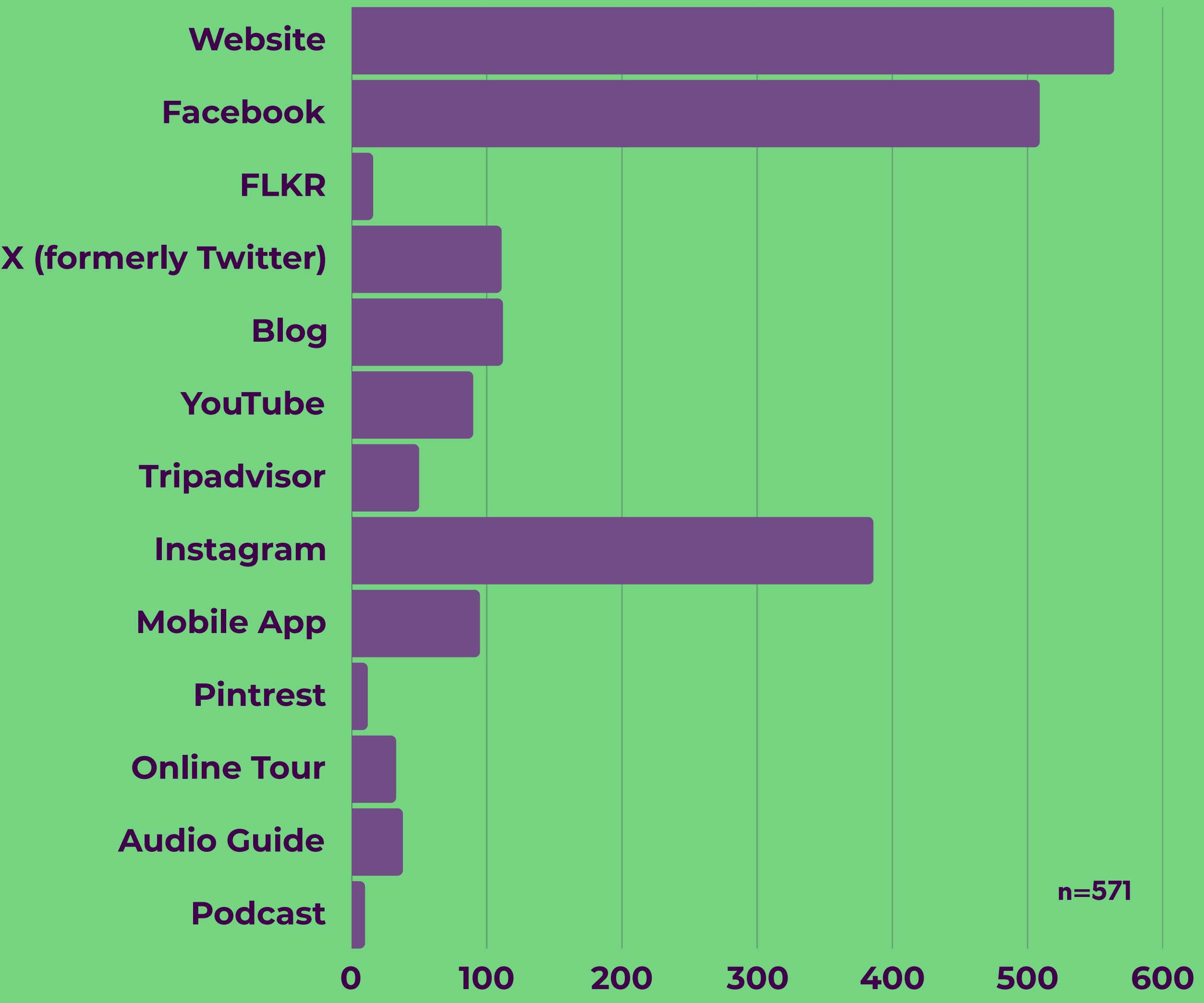
volume_of_visits	Count	Total_Visits	Total_Spend	AVG Catering	AVG Spend Per Visit
0 - 4,999	6	376812	£ 159,672.40	62802	£ 0.42
10,000 - 19,999	16	1312472	£ 989,064.49	82029.5	£ 0.75
100,000 +	26	39927964	£ 21,417,933.46	1535690.92	£ 0.54
20,000 - 49,999	20	3849223	£ 3,495,534.96	192461.15	£ 0.91
5,000 - 9,999	4	450895	£ 94,061.00	112723.75	£ 0.21
50,000 - 99,999	15	4475823	£ 4,033,480.00	298388.2	£ 0.90

Geographic Location

Location	Count	Total_Visits	Total_Spend	AVG Catering	AVG Spend Per Visit
Coastal	19	6521769	£ 4,949,352.70	343251	£ 0.76
Inland	60	41887093	£ 23,569,849.16	698118.22	£ 0.56
Islands	8	1984327	£ 1,670,544.45	248040.88	£ 0.84

Web & Social Media

Figure 21 Web Presence 2024



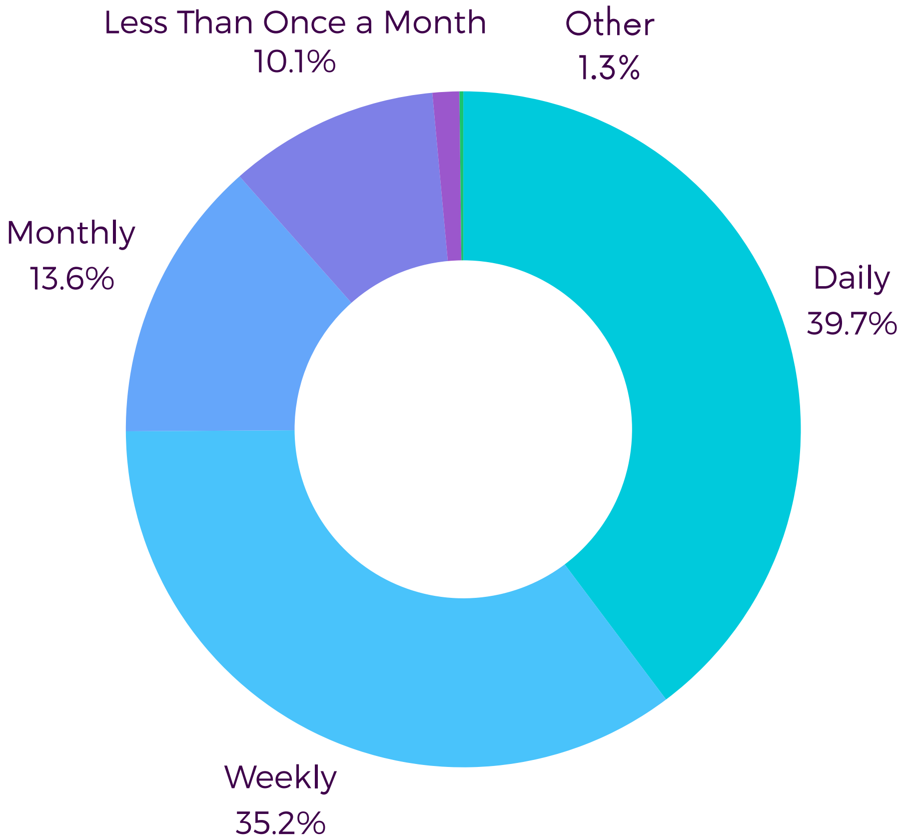
Attraction operators indicated whether or not they had a website or a web page and/or social media presence in 2024.

Almost all responding attractions have a social media presence, with either their own social media site or presence on a Local Authority, local area, umbrella organisation or VisitScotland Website.

Web & Social Media Frequency of Updates 2024

Some 545 attraction operators indicated how often they updated their web and social media pages. The results are detailed in the graph below:

Figure 22 Web & Social Media Frequency of Updates 2024



Over a third (39.7%) of respondents update their web and/or social media pages daily, however, only 10.1% of the respondents updated their pages/website less than once a month.

Figure 23 Employment in 2024 by Attraction Category

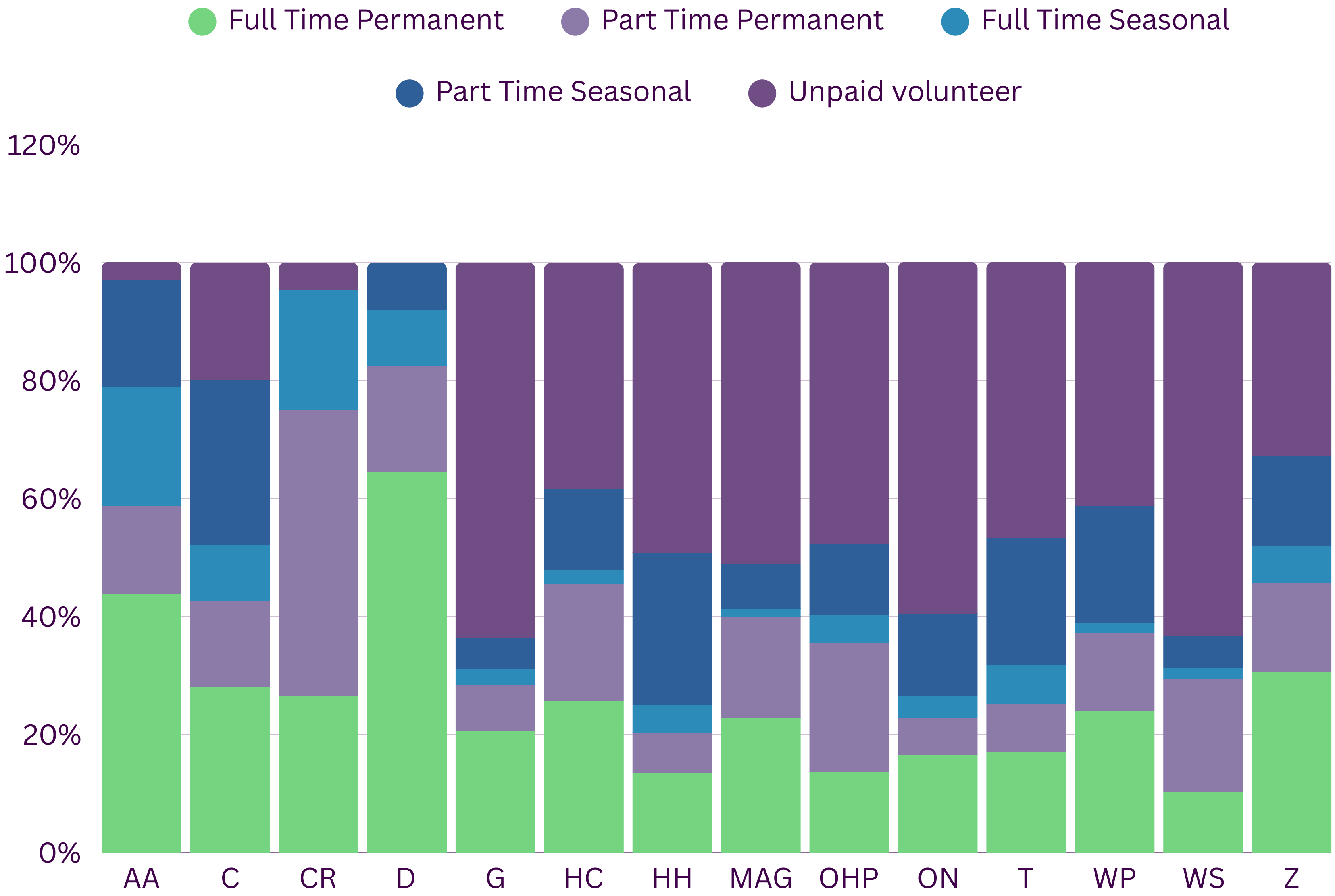
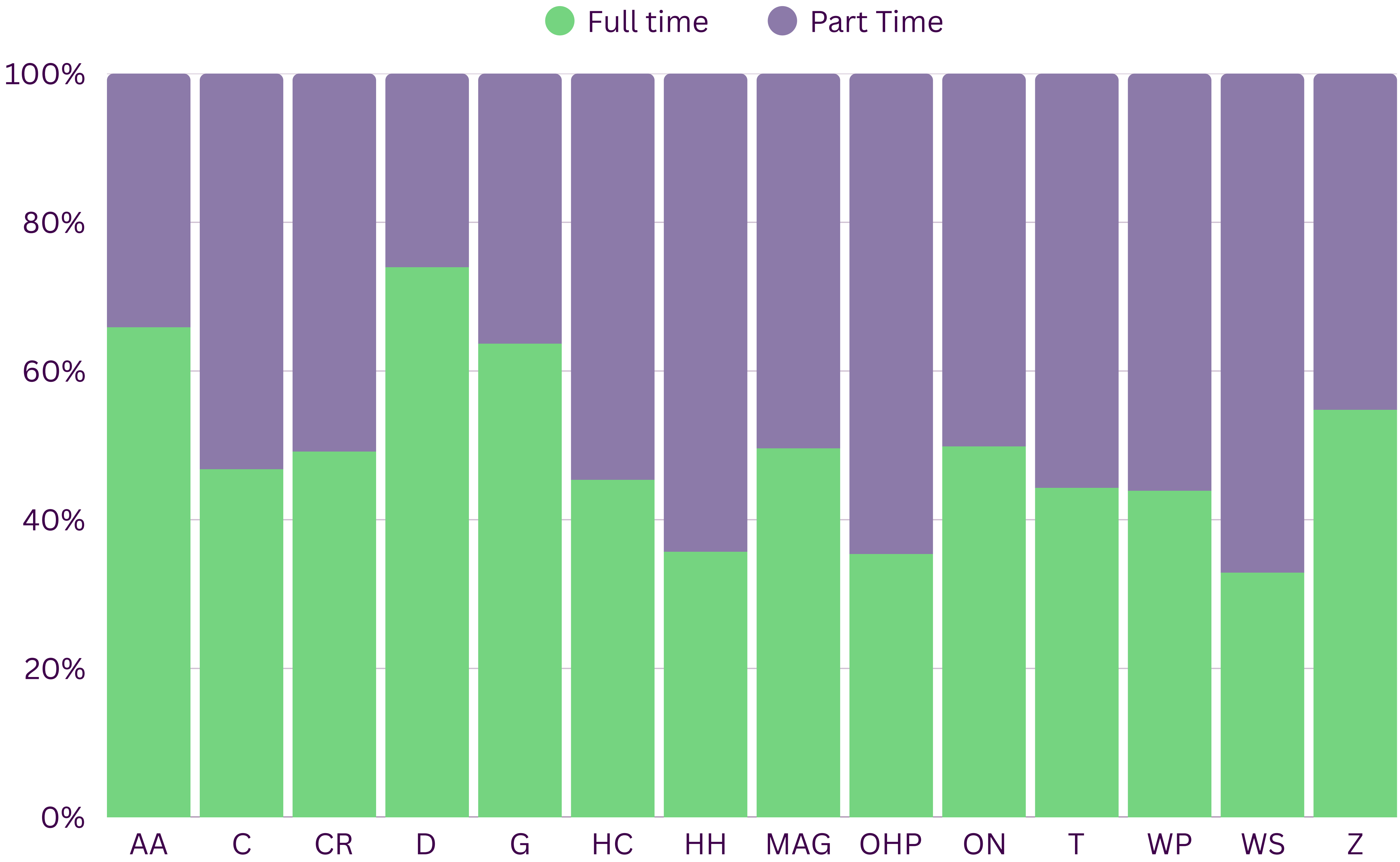


Table 6 Employment in Visitor Attractions 2024

2024 Staffing	
Sample	**549**
Full Time Permanent	**3,387**
Full Time Seasonal	**646**
Part-Time Permanent	**1,960**
Part-Time Seasonal	**1,932**
Total Paid Workforce	**7,925**
Unpaid Volunteer	**6,058**
Total Workforce	**13,983**

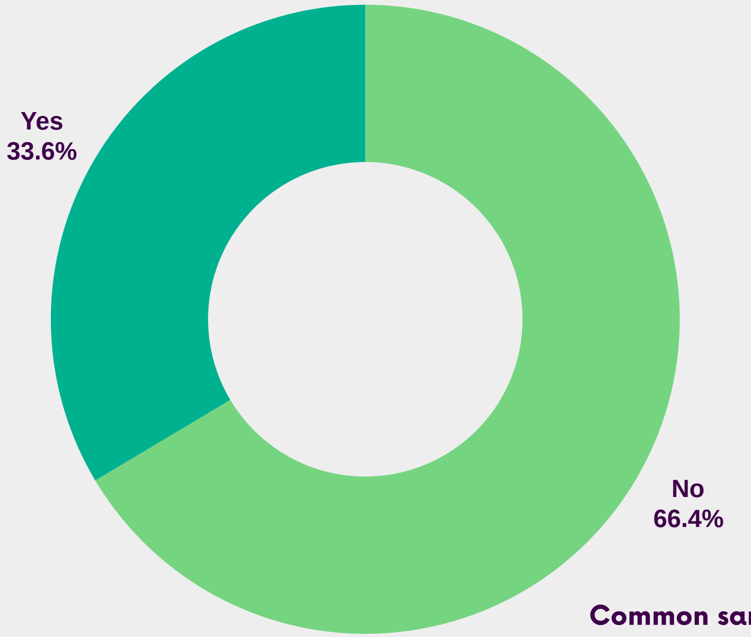
Employment in Visitor Attractions shows that Unpaid Volunteers represent 43.3% of the total workforce for 2024.

Figure 24 Employment in 2024 by Full Time/Part Time and Attraction Category



Green Tourism Award

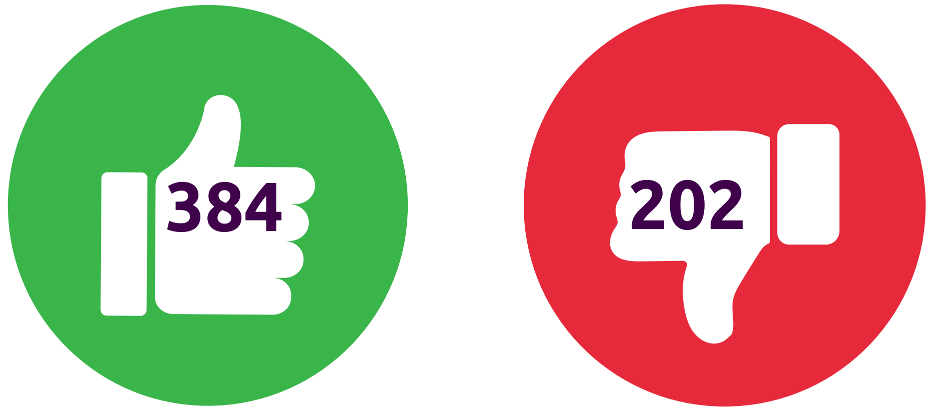
Figure 27 Green Tourism Award



Common sample: 581

Attractions within VisitScotland Quality Assurance Scheme

Figure 28 VisitScotland Quality Assurance Scheme



Sample	Attractions star rating
5	★★☆☆☆
72	★★★☆☆
221	★★★★☆
86	★★★★★

POSITIVE/NEGATIVE FACTORS

Positive

Good weather — especially in spring and autumn.
Strong demand for staycations and domestic travel.
New exhibitions, tours, or attractions launched during the season.
Events and markets — especially weekends and themed days.
Media exposure — e.g. STV and Springwatch coverage.
Increased demand for walking holidays.
The West Highland Way sustaining visitor numbers.
Recovery of the overseas school and tour group market.
More people booking private tours.
Major special events hosted by sites.

Negative

Poor or wet weather — especially in summer and November.
Cost of living crisis — affecting visitor numbers and spend.
Cold or uninviting buildings in bad weather.
Brexit and ferry disruption (e.g., CalMac booking issues).
General reduced disposable income in the domestic market.
Visitor hesitation due to ferry reliability.
Energy costs affecting venue operations.
Lack of short sea ferry options.
Poor seasonal timing for some events.
Lower school group numbers due to budgets or logistics.

CURRENCY

Figure 30 Currency Data : £ - €

£ GBP to € EUR

Average
2024 vs. 2023

£ GBP to € EUR - 3 Year Average

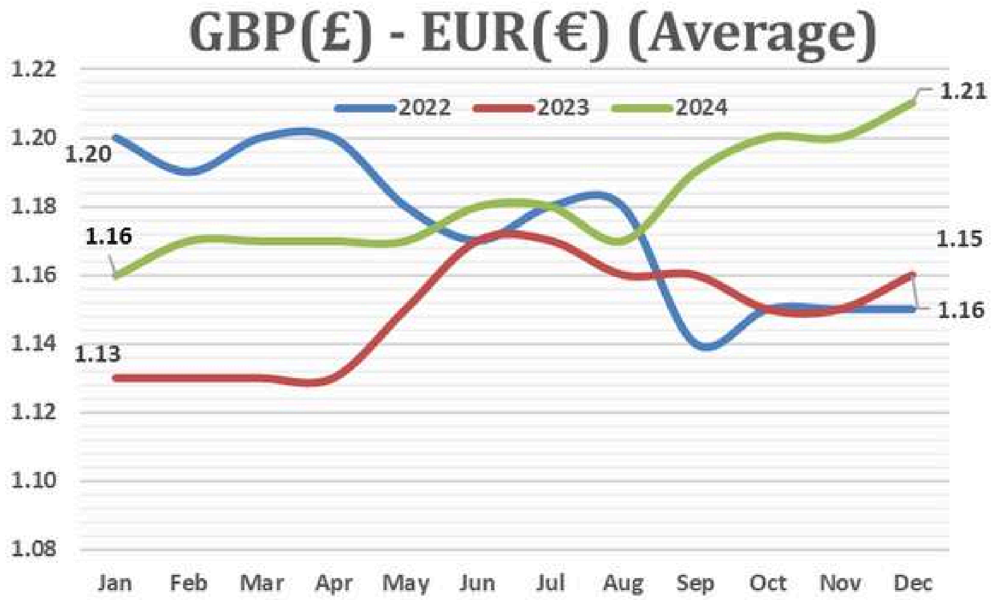
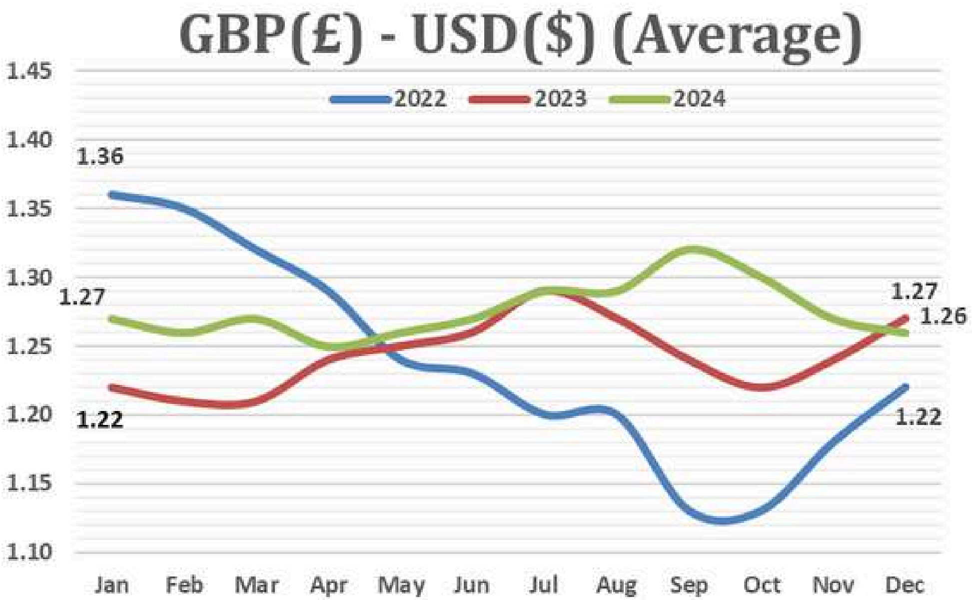


Figure 31 Currency Data : £ - $(US)

£ GBP to $ USD

Average
2024 vs. 2023

£ GBP to $ USD - 3 Year Average



Source: www.ofx.com

AIRPORT
Top Five Scottish Airports

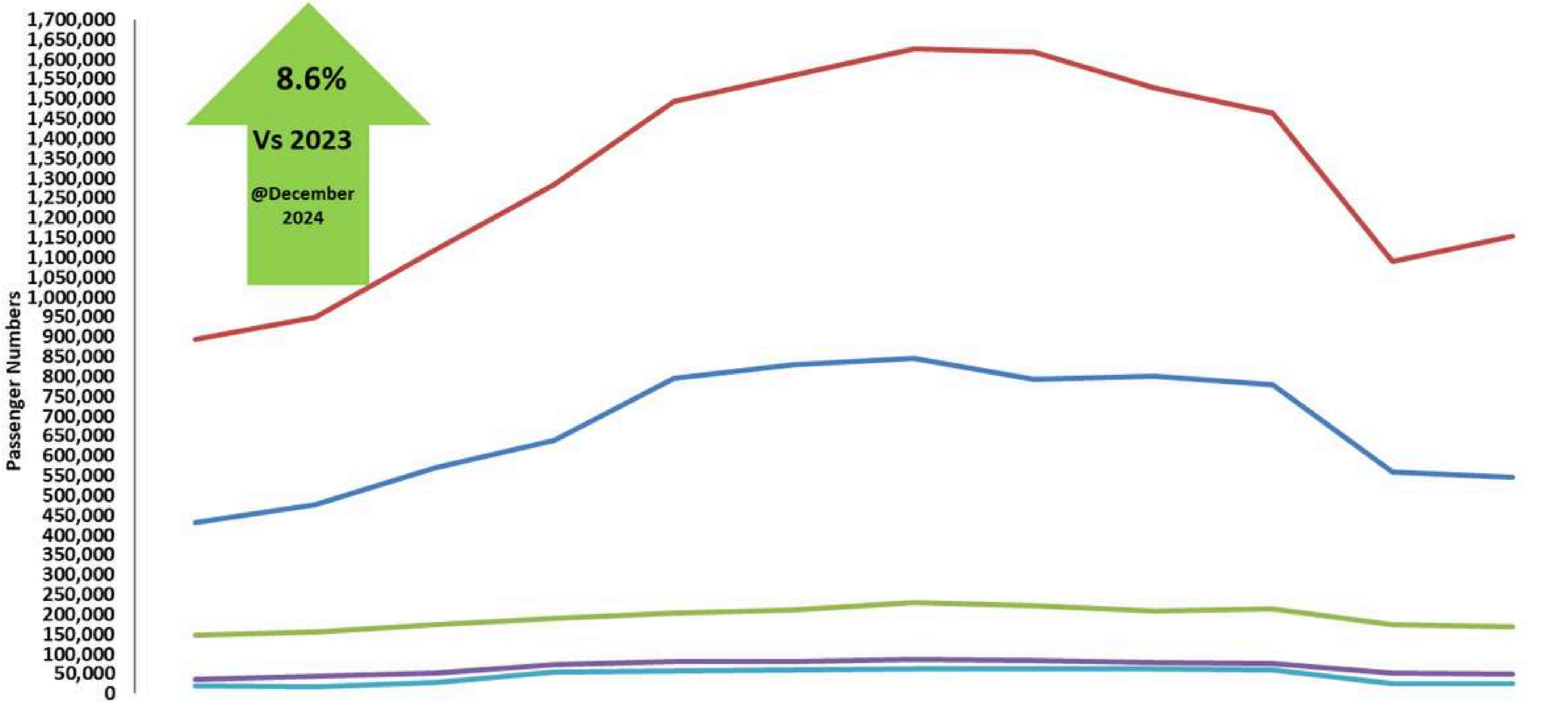
Figure 32 Top Five Scottish Airports Data

	2017	2018	2019	2020	2021	2022	2023	2024
Glasgow	9,897,959	9,656,227	8,847,100	1,946,474	2,072,546	6,517,585	7,358,828	8,067,116
Edinburgh	13,410,343	14,294,305	14,737,388	3,474,879	3,024,960	11,250,211	14,396,794	15,780,353
Aberdeen	3,090,642	3,056,018	2,912,883	994,077	1,075,639	1,960,307	2,229,918	2,300,657
Inverness	874,934	894,360	938,232	241,167	357,338	700,012	802,322	796,999
Prestwick	696,309	681,715	640,050	90,787	78,059	445,211	524,880	535,570

AIRPORT
Top Five Scottish Airports

Source: Civil Aviation Authority

Terminal & Transit Passengers at Scotland's Five Main Airports

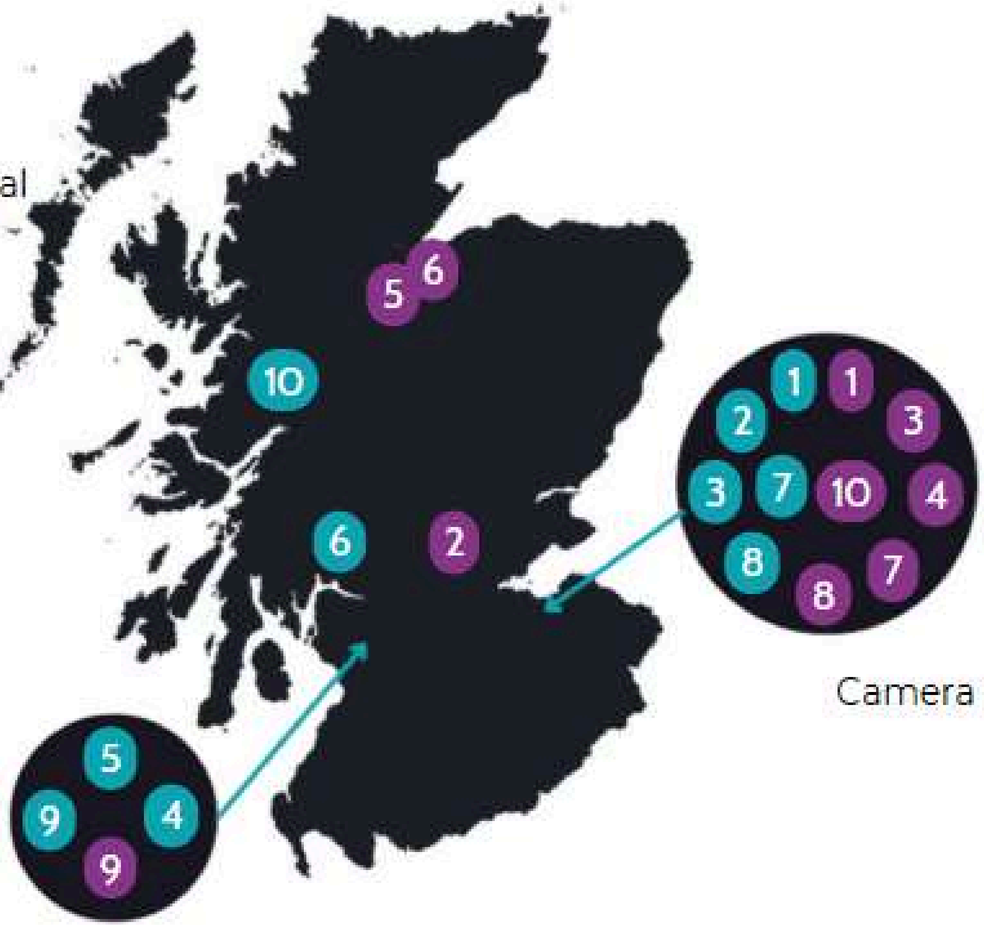


	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024	August 2024	September 2024	October 2024	November 2024	December 2024
Glasgow	432,447	475,854	568,517	637,960	796,343	830,479	846,250	793,832	801,653	779,305	558,251	546,225
Edinburgh	894,763	948,005	1,118,057	1,283,382	1,494,105	1,560,119	1,626,726	1,617,538	1,528,637	1,465,440	1,090,264	1,153,317
Aberdeen	147,266	156,482	174,666	189,148	203,708	211,464	229,349	222,672	208,600	212,638	175,310	169,354
Inverness	37,209	43,964	51,219	74,380	81,413	81,332	87,429	84,020	77,981	76,333	51,154	50,565
Prestwick	20,902	18,110	28,114	53,446	57,358	60,185	63,619	63,116	62,389	58,731	24,649	24,951

Scottish Visitor Attraction Monitor 2024 Highlights

Top Free Attractions

1. National Museum of Scotland
2. National Galleries Scotland: National
3. St Giles' Cathedral
4. Riverside Museum
5. Kelvingrove Art Gallery & Museum
6. Loch Lomond Shores
7. Royal Botanic Garden
8. Edinburgh National War Museum
9. The Burrell Collection
10. Glenfinnan Monument



Top Paid Attractions

1. Edinburgh Castle
2. Stirling Castle
3. Edinburgh Bus Tours
4. Edinburgh Zoo
5. Urquhart Castle
6. Culloden Visitor Centre
7. The Royal Yacht Britannia
8. Camera Obscura & World of Illusions
9. Glasgow Science Centre
10. Newhailes

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Table 8 Top 10 Paid & Free Attractions 2024 / 2023

TOP 10 PAID ADMISSION ATTRACTIONS 2024/2023

Owner	Attraction	2024	2023	% 24/23	Diff (24-23)	Category	VS Region
HES	Edinburgh Castle	1,981,152	1,905,650	4.0	75,502	C	ED
HES	Stirling Castle	594,938	518,082	14.8	76,856	C	AR
P	Edinburgh Bus Tours	563,568	605,881	-7.0	-42,313	T	ED
CT	Edinburgh Zoo	531,557	618,719	-14.1	-87,162	Z	ED
HES	Urquhart Castle	473,814	442,761	7.0	31,053	C	HI
NTS	Culloden Visitor Centre	374,443	262,199	42.8	112,244	HC	HI
CT	The Royal Yacht Britannia	332,635	361,175	-7.9	-28,540	OHP	ED
P	Camera Obscura & World of Illusions	331,881	376,470	-11.8	-44,589	MAG	ED
CT	Glasgow Science Centre	330,536	350,441	-5.7	-19,905	MAG	GG
NTS	Newhailes	304,111	278,624	9.1	25,487	HH	ED

TOP 10 FREE ADMISSION ATTRACTIONS* 2024/2023

Owner	Attraction	2024	2023	% 24/23	Diff (24-23)	Category	VS Region
G	National Museum of Scotland	2,314,974	2,186,841	5.9	128,133	MAG	ED
O	National Galleries Scotland: National	1,999,196	1,836,057	8.9	163,139	MAG	ED
RO	St Giles' Cathedral	1,742,147	1,473,211	18.3	268,936	WP	ED
LA	Riverside Museum	1,273,395	1,265,011	0.7	8,384	MAG	GG
LA	Kelvingrove Art Gallery & Museum**	1,172,226	1,283,882	-8.7	-111,656	MAG	GG
G	Loch Lomond Shores	1,099,738	1,032442	6.5	67,296	WS	AR
CT	Royal Botanic Garden Edinburgh	1,041,767	1,041,391	0.0	376	G	ED
G	National War Museum	756,200	773,213	-2.2	-17,013	MAG	ED
LA	The Burrell Collection	555,888	498,169	11.6	57,719	MAG	GG
NTS	Glenfinnan Monument	546,377	540,853	1.0	5,524	OHP	HI

*Top 10 Free Admission attractions table does not include Country Park Attractions

**Out of Hours events are not included in the visits

Information extracted from the Moffat Centre Scottish Visitor Attraction Monitor 2024

Appendix 1 - Abbreviations

Abbreviations

Visitor Attraction Ownership

CT	Charity or Trust
G	Government Department/Agency
HS	Historic Environment Scotland
LA	Local Authority
NTS	The National Trust for Scotland
PLC	Public Limited Company/plc
P	Privately Owned
RO	Religious Organisation
O	Other (e.g. Educational Institutions)

Former VisitScotland Areas

AB	Aberdeen & Grampian
ALLFV/AR	Argyll, Loch Lomond & The Forth Valley
AN	Angus & City of Dundee
AY	Ayrshire & Arran
DG	Dumfries & Galloway
ED	Edinburgh & Lothians
FI	Kingdom of Fife
GG	Greater Glasgow & Clyde Valley
HI	Highlands of Scotland
OR	Orkney
OH	Outer Hebrides
PE	Perthshire
SB	Scottish Borders
SH	Shetland

Category

AA	Activity Attractions
C	Castles/Forts
CR	Scottish Crafts/Retail Attractions
D	Distilleries/Breweries/Wineries
G	Gardens
HC	Heritage Centres
HH	Historic Houses/Palaces
MAG	Museums/Art Galleries (includes Science/Technology Centres)
OHP	Other Historic Properties
ON	Outdoors/Nature Attractions
T	Transport-Related Attractions
WP	Industrial/Workplaces
WS	Places of Worship/Spiritual Attractions
Z	Wildlife/Animal Attractions

Other Abbreviations

MC	Moffat Centre for Travel & Tourism Business Development
NMS	National Museum of Scotland
NNR	National Nature Reserve
VAB	Visitor Attraction Barometer
VAM	Visitor Attraction Monitor
VS	VisitScotland

Appendix 2 - Analysis Variables 2024

Attraction Categories

The VisitScotland Visitor Attraction Monitor 2009 (VAM) and Barometer (VAB) utilised slightly different categories. We changed those in 2010 to enhance coherence and understanding of the data. The table below shows Former Categories and new Categories The later are now used throughout the report.

[redacted]

Former VAM Categories	New Categories
Castles/Forts	Castles/Forts
Places of Worship	Places of Worship/Spiritual Attractions
Distilleries/Vineyards/Breweries	Distilleries/Breweries/Wineries
Industrial/Craft Workplaces	Industrial/Workplaces
	Distilleries/Breweries/Wineries
	Scottish Crafts/Retail Attractions
Gardens	Gardens
Historic Houses/Palaces	Historic Houses/Palaces
Museums/Art Galleries	Museums/Art Galleries
Historic Monuments/Archaeological Sites	Other Historic Properties
Other Historic Properties	
Country/Forest Parks	Outdoors/Nature Attractions
Heritage/Visitor Centres	Outdoors/Nature Attractions
	Heritage Centres
	Scottish Crafts/Retail Attractions
Steam/Heritage Railways	Transport-Related Attractions
Safari Parks/Zoos/Aquaria/Aviaries/Farms	Wildlife/Animal Attractions
Nature Centres/Reserves/Wetlands/ Wildlife Trips	Wildlife/Animal Attractions
	Outdoors/Nature Attractions
	Activity Attractions
Other	Not applicable any longer – attractions distributed within new categories

- National Nature Reserves (NNRs) (previously included in Nature Reserve/Wetlands/Wildlife Trips)
- Wetlands (previously included in Nature Reserve/Wetlands/Wildlife Trips)
- Visitor Centres with Ranger Service, located within Country Park/NNRs, etc (previously included in Country/Forest Parks or Heritage/Visitor Centre)

The category Wildlife/Animal includes:

- Safari Parks
- Zoos
- Aquarium
- Farms
- RSPB Reserves
- Wildlife Trips(previously included in Nature Reserve/Wetlands/Wildlife Trips)

The new category Transport-Related Attractions includes:

- Steam/Heritage Railways
- Sightseeing Buses
- Boat Trips (not for wildlife sighting)
- Any other transport related attraction – eg Falkirk Wheel

The category Heritage Centres now only includes built/cultural heritage centres:

- Country Park/NNR Visitor Centres are now included within the new category Outdoors/Nature Attractions
- Visitor Centres within workplaces are included within the Distilleries/Breweries/Wineries or the Industrial/Workplaces categories
- A new category has been created for Retail Visitor Centres, now included within Scottish Crafts/Retail Attractions
- Those Visitor Centres that have Museums Galleries Scotland accreditation are classified under Museums/Art Galleries
- Only those that are Heritage Visitor Centres – and are not a Heritage House/Castle/Other Historic Property/Museum Collection remain in this category

Appendix 3 - Changes in Geographic Location Analysis

Changes in Geographic Location Analysis

Up to 2010 attractions were analysed according to whether they were Urban/Rural/Seaside.
This classification was problematic as some attractions could be located in both a Seaside area and an Urban area for example (e.g attractions in Aberdeen)

Two new sets of variables were introduced in 2010 to improve analysis:

- ***Geographic Location***, dividing attractions into three categories:
    - Island based attractions
    - Coastal attractions (located within approximately one mile of the coast)
    - Inland attractions (encompassing the remainder of attractions).

- Location according to the Scottish Government's 2013-2014 ***Urban Rural Classification,*** dividing attractions into the six categories shown in the following table.

[redacted]

Category	Description
Large Urban Areas	Settlements of over 125,000 people.
Other Urban Areas	Settlements of 10,000 to 124,999 people.
Accessible Small Towns	Settlements of 3,000 and 9,999 people and within 30 minutes drive of a settlement of 10,000 or more.
Remote Small Towns	Settlements of 3,000 and 9,999 people and with a drive time of over 30 minutes to settlement of 10,000 or more.
Accessible Rural	Settlements of less than 3,000 people and within 30 minutes drive of a settlement of 10,000 or more.
Remote Rural	Settlements of less than 3,000 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.

For more information, consult the Scottish Government's website at:
www.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification

Moffat Centre

About the Moffat Centre

The Moffat Centre is the largest and most established tourism research centre located within a University in the United Kingdom. Since its formation in 1999, we have undertaken a wide variety of projects, ranging from major feasibility studies, national tourism strategies and tourism development planning.

The Moffat Centre has funded more than £1 million in scholarships for students wishing to study and work in the tourism and hospitality sector – this is the largest and most successful such scholarship in tourism in Europe.

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