

# SCOTTISH VISITOR ATTRACTION BAROMETER

FEBRUARY 2025  
EDITION  
25/24

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# SCOTLAND OVERVIEW

# 618

Comparable  
Attractions

## February 2025/2024

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 February 2025 and February 2024. Some 621 attraction operators provided figures for February 2025 with 618 attractions providing comparable visits figures. The total number of visits for the responding 618 barometer attractions in Scotland for February 2025 was 2,695,273 Compared to data from the previous year of 2,601,716 visits, this shows a visit increase of 3.6%.



## 3.6%

National visits compared to February 2024

# 2,695,273

## Total Visits in February 2025



## 9.3%

National visits year to date vs. 2024

# 4,860,470

## Total Visits in 2025 to date



# EXECUTIVE SUMMARY

The February 2025 Scottish Visitor Attraction Barometer showed an increase in visitor numbers to attractions in Scotland compared to the same period in 2024. Scotland's visitor attractions saw a 3.6% increase in visitors in February 2024 compared to the same time in 2023.

Accessible Small Towns saw a significant increase in visits compared to February 2025, and the Highland Local Authority area (reporting 3+ attractions) saw a 105.3% increase, compared to February 2024. Looking at specific sectors, the Outdoors/Nature Attractions (21.0%) and the Heritage Centre (12.8%) categories continued to record the most substantial visitor growth. Attractions in the Castles/Forts category showed a 19.9% decrease in visits compared to the same period in 2024.

Attractions within the Highlands and Islands (Scottish Regional Economic Partnership (SREP)) saw a 76.5% increase in visits, however, attractions within the North East SREP saw a 23.1% decline in visitor numbers.

The consumer backdrop shows the latest Inflation Figures from the Office of National Statistics, UK CPI (consumer prices inflation) in the 12 months to February 2025 is 2.8%, down from 3.0% in January 2025. The CPI 12-month rate (%) for February 2025 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.4% down from 3.8% in January 2025. Inflation rates for restaurants and cafes were 3.4% up from 3.3% in January 2025.

Domestic consumer sentiment published by the GB National Tourist Boards covering February 2025 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the January 2025 survey). The survey recorded 46% of respondents (a 1% decrease on the January 2025 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, 16% of UK adults intended to take a domestic overnight trip in February/March 2025 and 81% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (81%). 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 the rising costs of holidays/leisure. The figures as mentioned earlier have seen a slight shift from personal finances to the rising costs of holidays/leisure as previously published in the GB National Tourist Surveys (VisitBritain 2025), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

Eurocontrol (European Air Traffic Agency) indicated in February 2025 that UK air connectivity saw a 8% increase when compared to the same period in 2024, also, 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 February 2025 global air passenger demand, measured by revenue per kilometer, was up 2.6% compared to February 2024. International demand rose 5.6% over the same period with domestic demand decreasing 1.9%. Africa region was the biggest global air passenger growth driver in February 2024 at 6.8% when compared to Europe at 4.3%.

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# HIGHLIGHTS

## Monthly Comparison

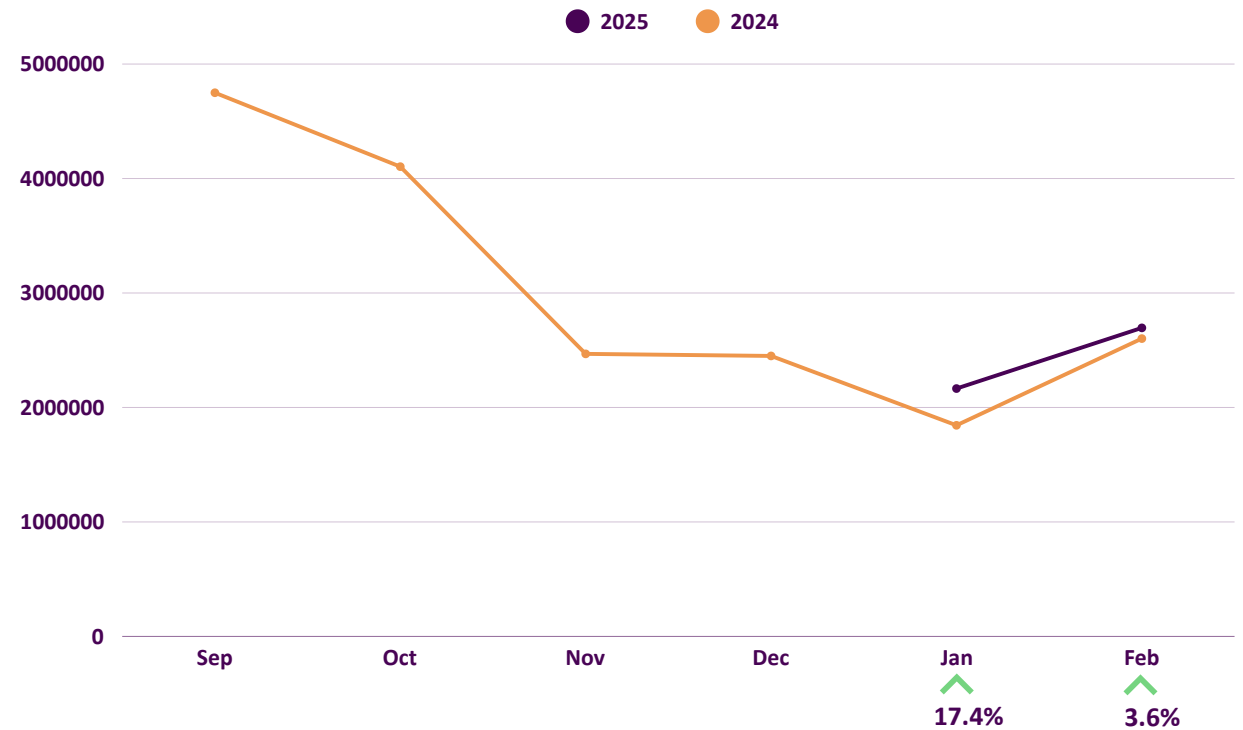
The largest percentage increase in visits recorded by former VisitScotland Regions for February 2025 was experienced by visitor attractions in the Highlands of Scotland Region.

The largest percentage decrease in visits recorded by former VisitScotland Regions for February 2025 was experienced by visitor attractions in the Scottish Borders Region.

The most significant percentage increase in visits recorded in the SREP when comparing February 2025 with the same period in 2024 was experienced by visitor attractions in the Highlands and Islands Region.

During this period, attractions in the Outdoors/Nature Attractions category recorded the largest percentage increase in visits.

Attractions in the Castles/Forts category recorded the greatest percentage decrease in visits compared to February 2024.



Attractions welcoming between 20,000 and 49,999 visits per year experienced the largest increase when comparing February 2025 with February 2024.

Attractions in Accessible Small Towns saw the most significant increase when comparing February 2025 with February 2024.

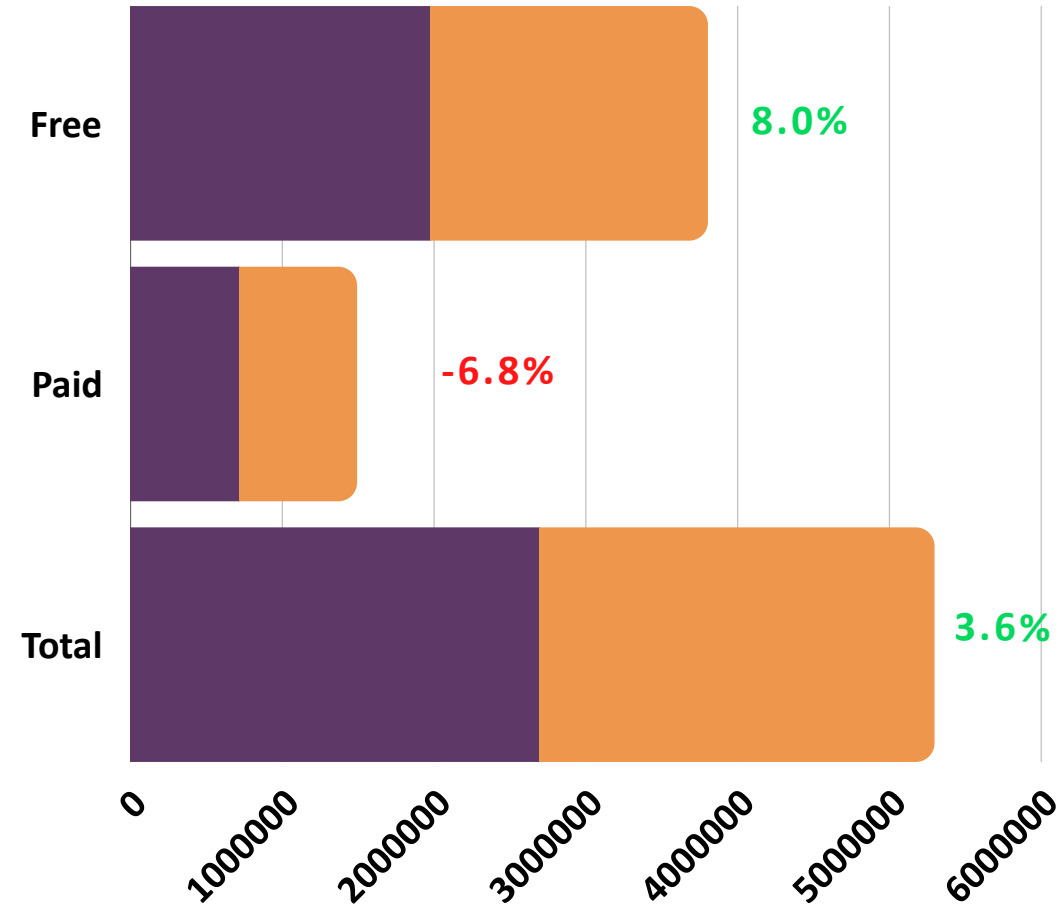
The most significant percentage increase in visits by Council Area (reporting 3+ attractions) was experienced by attractions in the Highland Area followed by the North Ayrshire Area. Visitor Attractions in the Angus and Scottish Borders Areas experienced the most significant percentage decrease in visits when comparing February 2025 with February 2024.

# ADMISSIONS

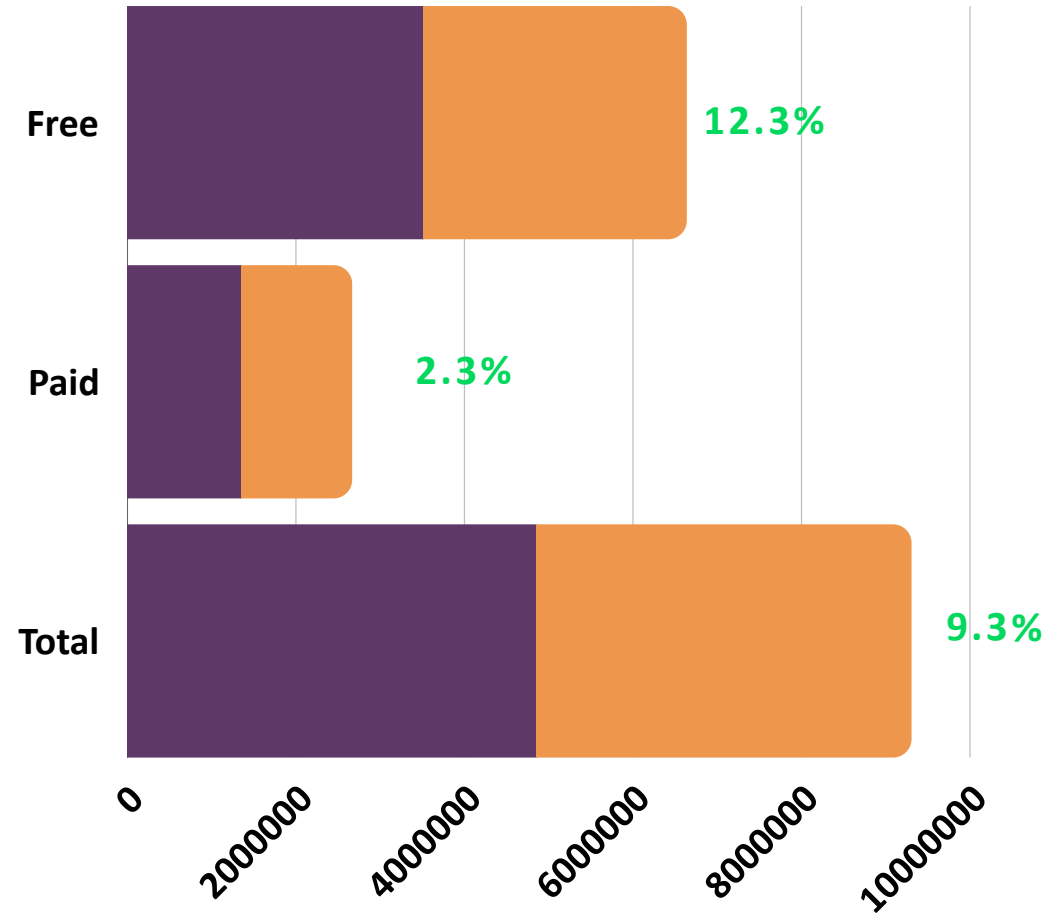
2025 2024

## Policy Overview

### February 2025 vs. February 2024 Comparison



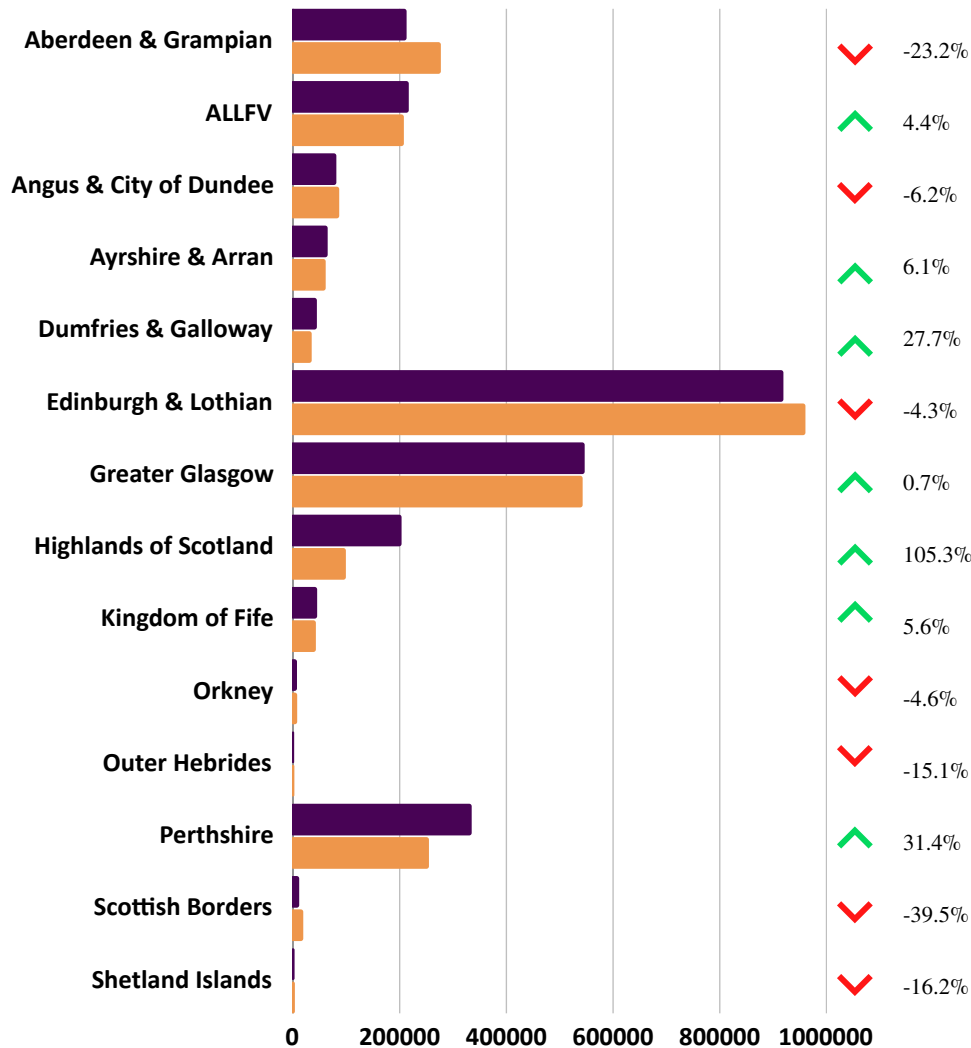
### Year to Date 25 vs. 24 Comparison



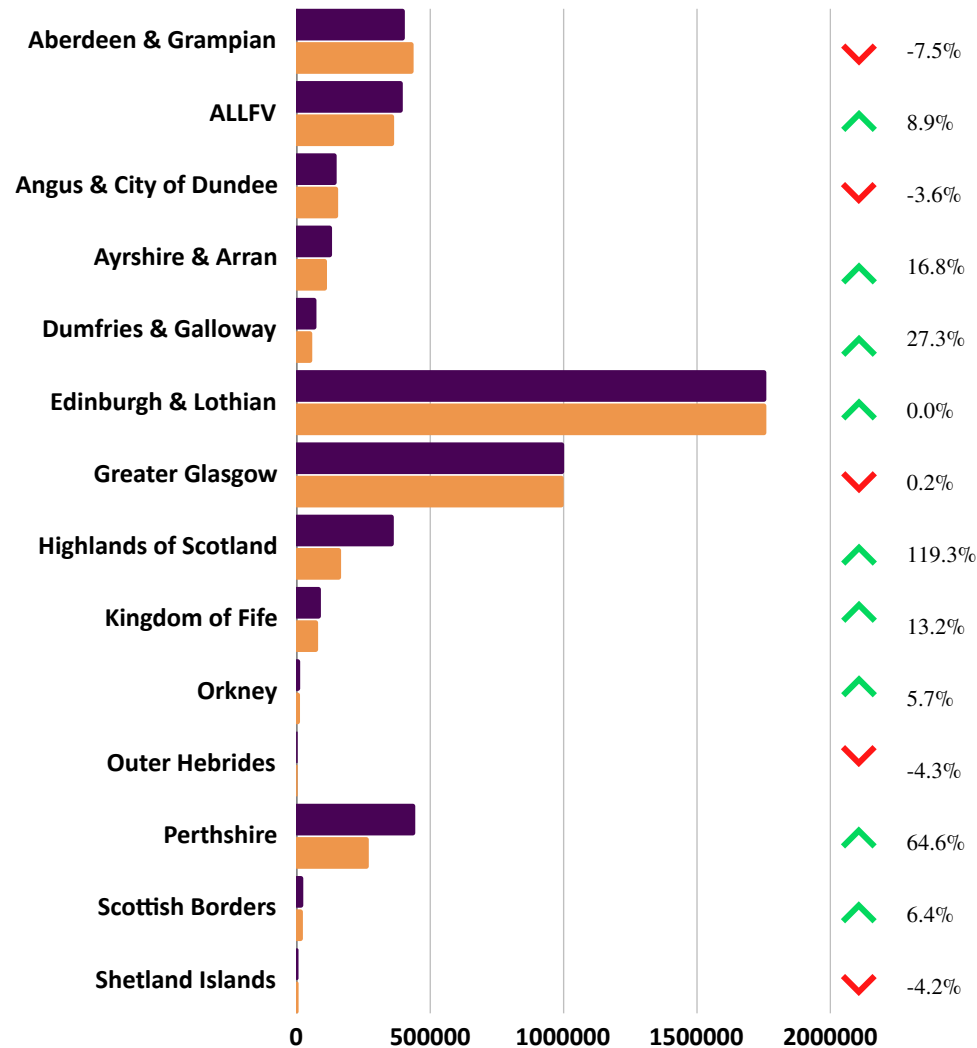
PERFORMANCE

By Former Visit Scotland Area

2025 February (vs. 2024)



2025 Year to Date (vs. 2024)



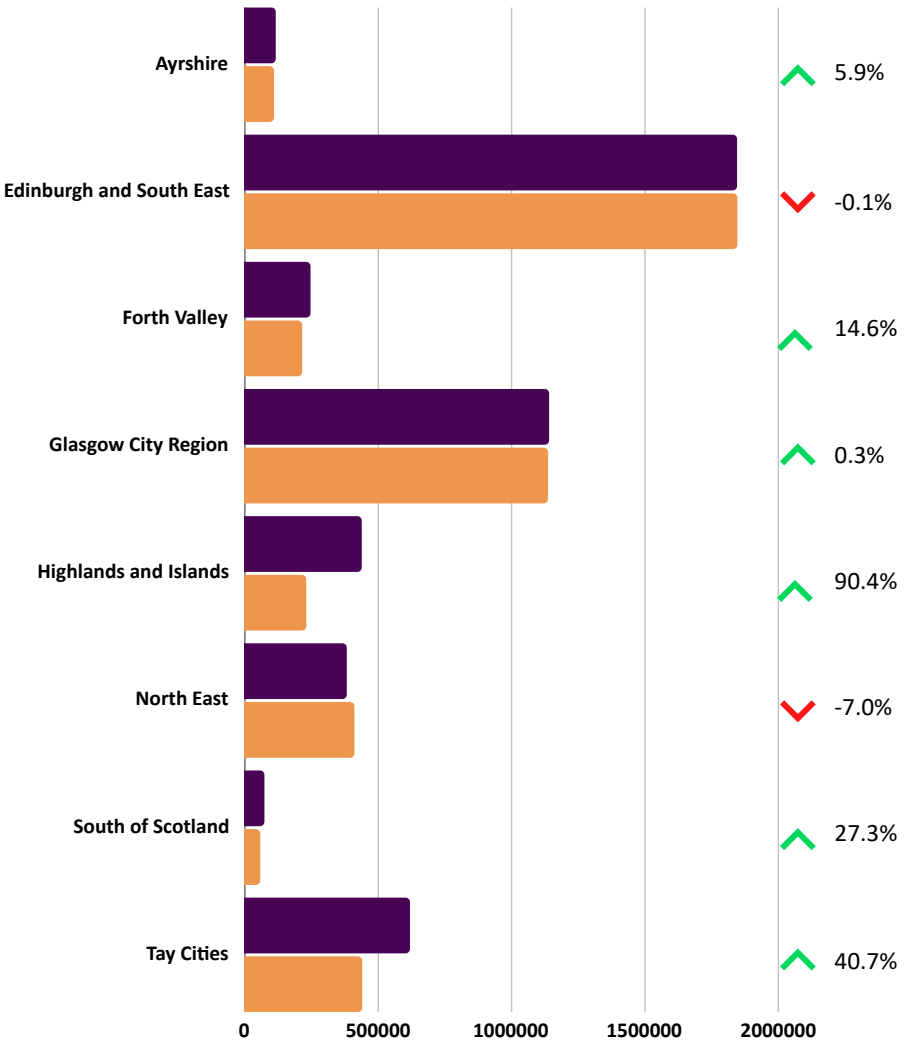
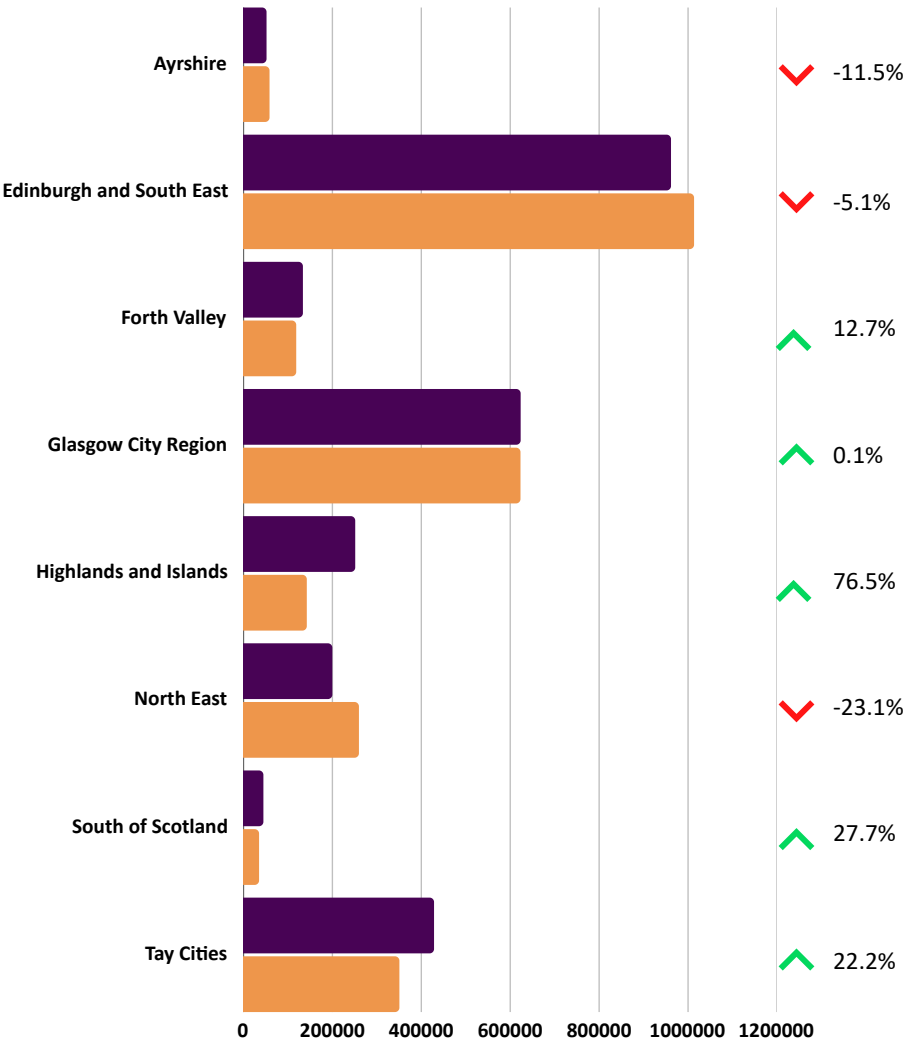


PERFORMANCE

By Regional Economic Partnerships

2025 February (vs. 2024)

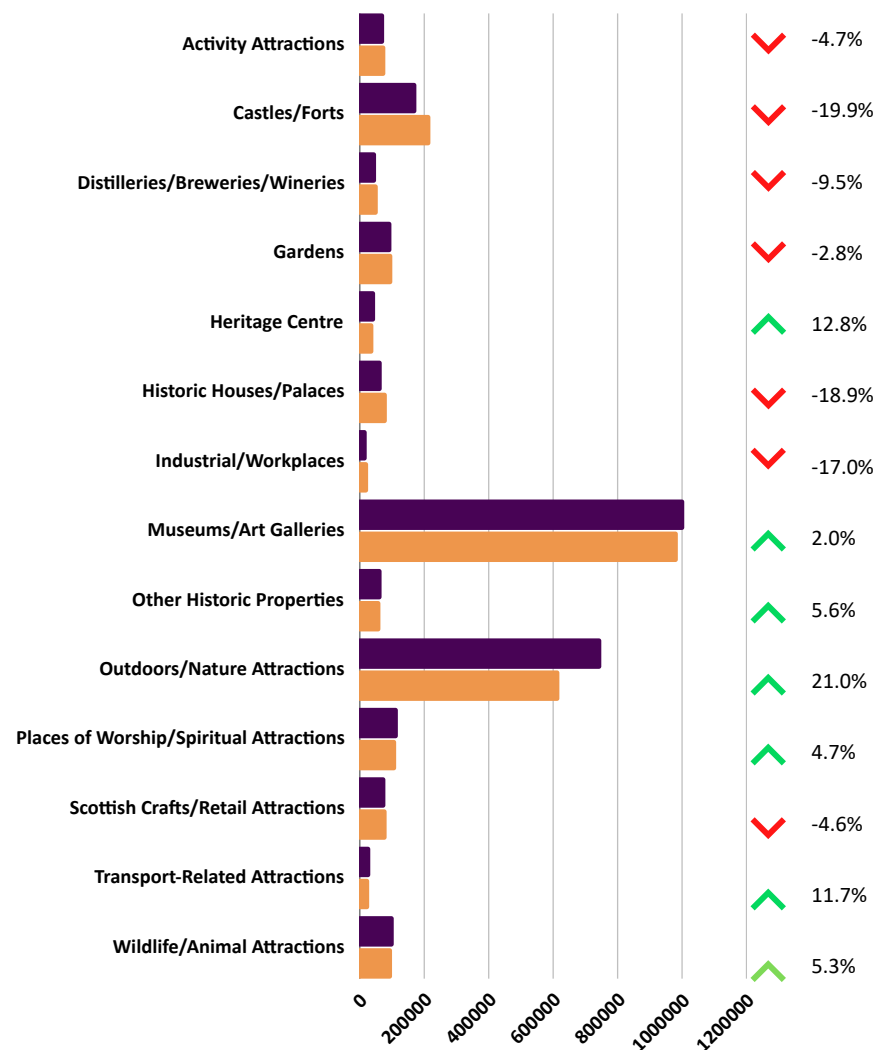
2025 Year to Date (vs. 2024)



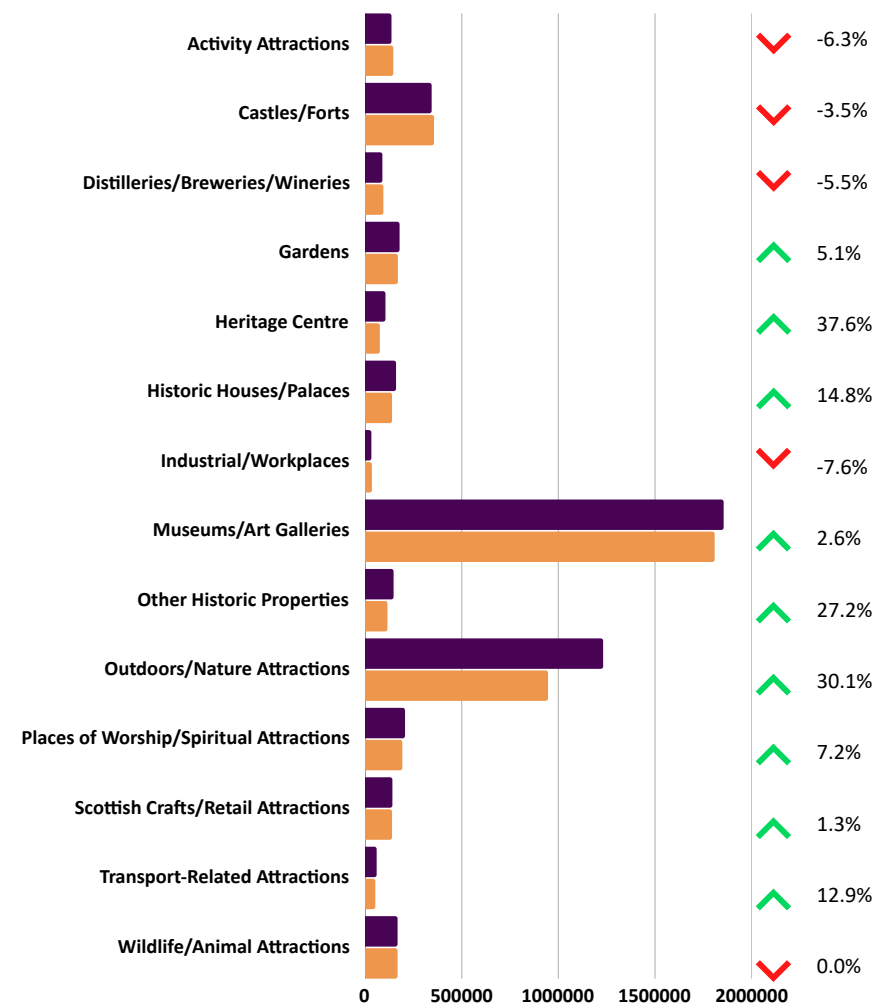
# PERFORMANCE

## By Attraction Category

### 2025 February (vs. 2024)



### 2025 Year to Date (vs. 2024)



# PERFORMANCE

## By Location Accessibility & Density

2025 February (vs. 2024)

**-17%**

Accessible Rural

**71%**

Accessible Small Towns

**-3%**

Large Urban Areas

**7%**

Other Urban Areas

**14%**

Remote Rural

**1%**

Remote Small Towns

2025 Year to Date (vs. 2024)

**-4%**

Accessible Rural

**98%**

Accessible Small Towns

**0%**

Large Urban Areas

**12%**

Other Urban Areas

**52%**

Remote Rural

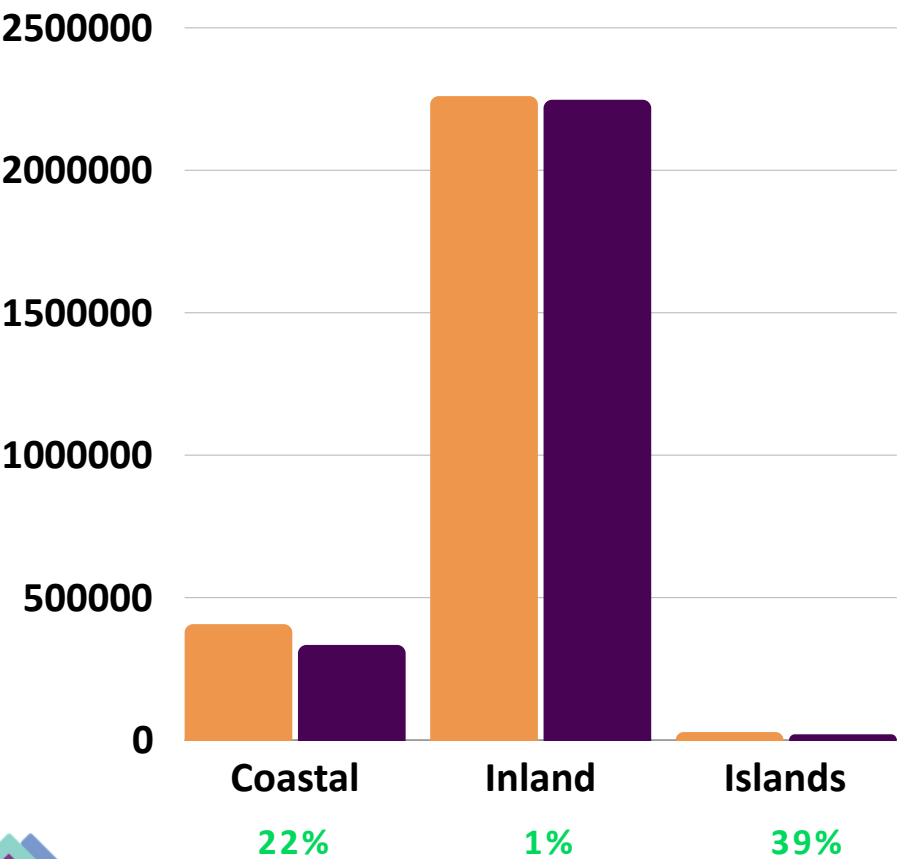
**9%**

Remote Small Towns

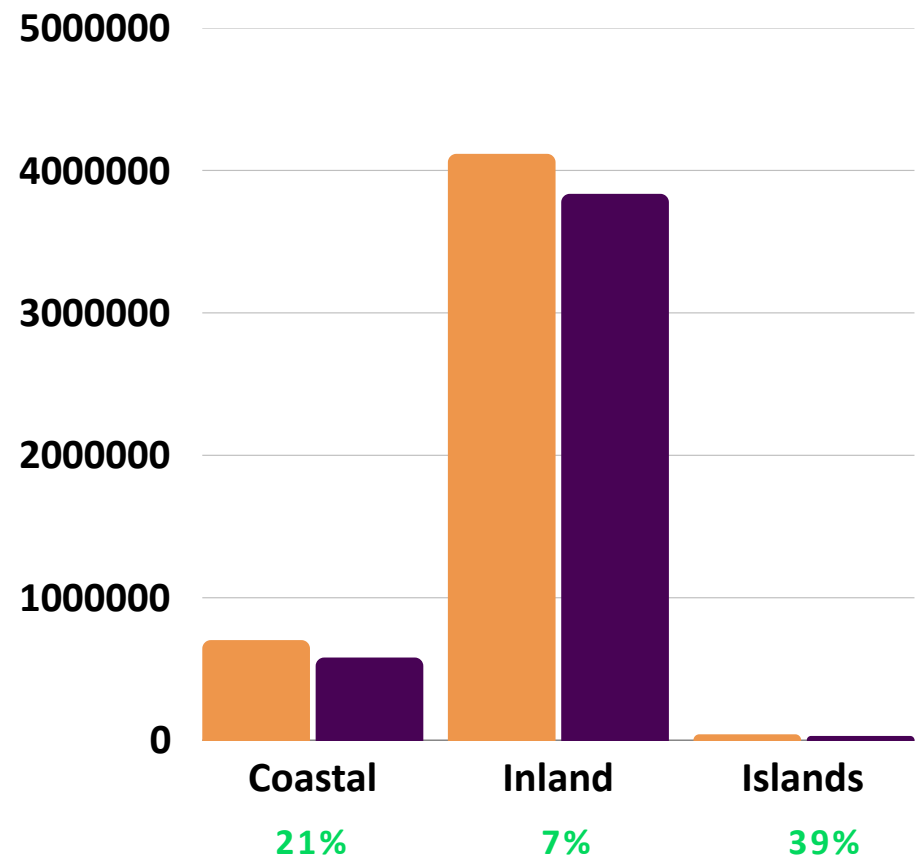
# PERFORMANCE

## By Geographic Location

2025 February (vs. 2024)



2025 Year to Date (vs. 2024)



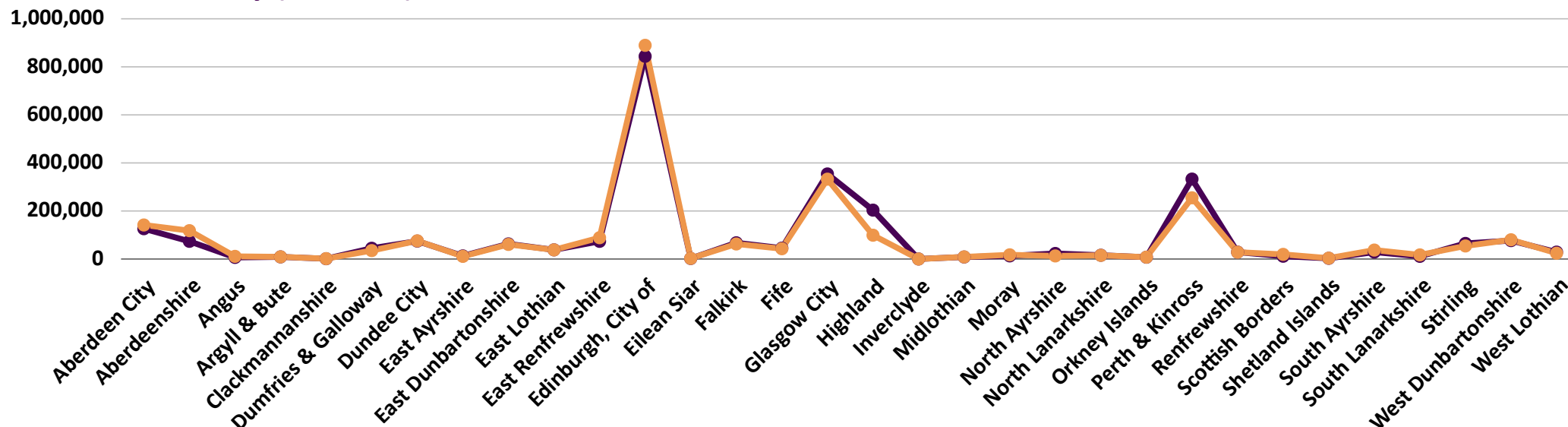
# PERFORMANCE

2025

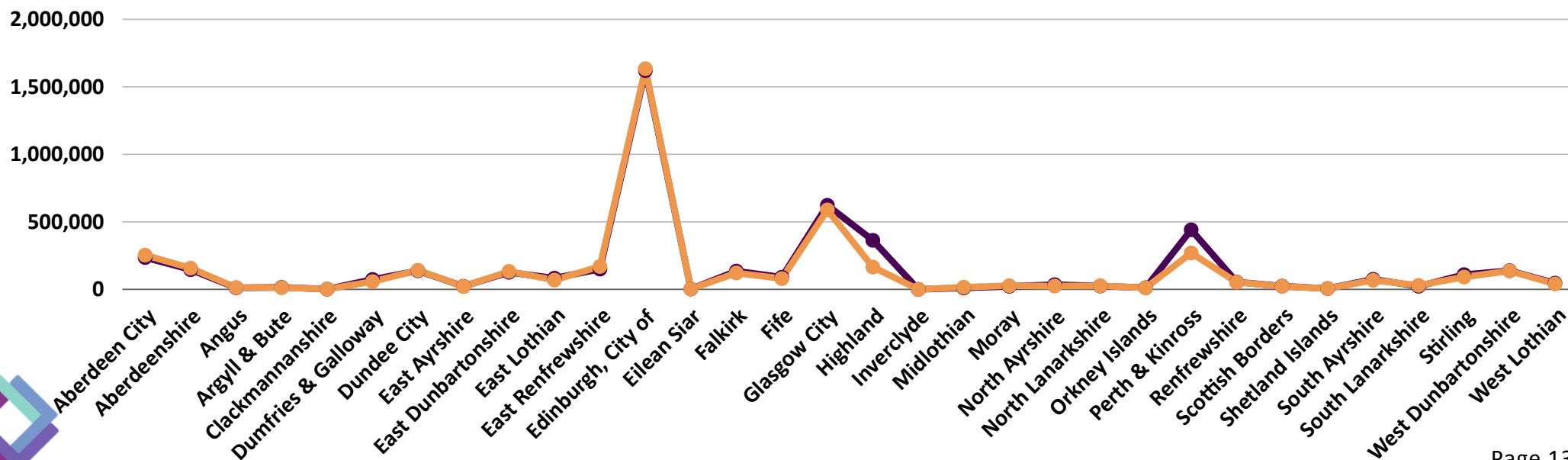
2024

## By Council Area

### 2025 February (vs. 2024)



### 2024 Year to Date (vs. 2023)



# PERFORMANCE

## By Visit Scotland Area

2025 February (vs. 2024)

Admission By Region				
Region	No of Attractions	2025	2024	% Change
Aberdeen & Grampian	80	212958	277177	-23.2%
ALLFV	80	217051	207838	4.4%
Angus & City of Dundee	31	81300	86662	-6.2%
Ayrshire & Arran	26	65016	61302	6.1%
Dumfries & Galloway	43	44796	35069	27.7%
Edinburgh & Lothian	89	919272	960562	-4.3%
Greater Glasgow	58	546746	542938	0.7%
Highlands of Scotland	65	203526	99127	105.3%
Kingdom of Fife	34	45297	42895	5.6%
Orkney	22	7508	7873	-4.6%
Outer Hebrides	12	2216	2611	-15.1%
Perthshire	29	334960	254846	31.4%
Scottish Borders	31	11651	19266	-39.5%
Shetland Islands	18	2976	3550	-16.2%

Year to Date 2025/2024

Ytd Admission By Region				
Region	No of Attractions	2025	2024	% Change
Aberdeen & Grampian	80	404735	437543	-7.5%
ALLFV	80	397022	364541	8.9%
Angus & City of Dundee	31	149101	154665	-3.6%
Ayrshire & Arran	26	131787	112852	16.8%
Dumfries & Galloway	43	73342	57635	27.3%
Edinburgh & Lothian	89	1759899	1759996	0.0%
Greater Glasgow	58	1002068	1000145	0.2%
Highlands of Scotland	65	363331	165678	119.3%
Kingdom of Fife	34	90044	79535	13.2%
Orkney	22	12359	11690	5.7%
Outer Hebrides	12	2880	3010	-4.3%
Perthshire	29	443804	269573	64.6%
Scottish Borders	31	23990	22543	6.4%
Shetland Islands	18	6108	6377	-4.2%

## By Regional Economic Partnerships

2025 February (vs. 2024)

Admission By Sgrop				
SGREP	No of Attractions	2025	2024	% Change
Ayrshire	21	51853	58590	-11.5%
Edinburgh and South East	135	961660	1013527	-5.1%
Forth Valley	34	133672	118634	12.7%
Glasgow City Region	65	623455	623075	0.1%
Highlands and Islands	187	251355	142426	76.5%
North East	55	199839	259691	-23.1%
South of Scotland	43	44796	35069	27.7%
Tay Cities	78	428643	350704	22.2%

Year to Date 2025/2024

Admission By Sgrop				
SGREP	No of Attractions	2025	2024	% Change
Ayrshire	21	115748	109313	5.9%
Edinburgh and South East	135	1845329	1846464	-0.1%
Forth Valley	34	246123	214818	14.6%
Glasgow City Region	65	1140584	1136706	0.3%
Highlands and Islands	187	438270	230200	90.4%
North East	55	382142	410799	-7.0%
South of Scotland	43	73342	57635	27.3%
Tay Cities	78	618932	439848	40.7%



# PERFORMANCE

## By Attraction Category

### 2025 February (vs. 2024)

Admission By Category				
Category	No of Attractions	2025	2024	% Change
Activity Attractions	13	75464	79199	-4.7%
Castles/Forts	57	175544	219028	-19.9%
Distilleries/Breweries/Wineries	55	50436	55723	-9.5%
Gardens	27	98076	100875	-2.8%
Heritage Centre	25	47448	42078	12.8%
Historic Houses/Palaces	46	67999	83880	-18.9%
Industrial/Workplaces	9	21391	25774	-17.0%
Museums/Art Galleries	235	1006816	986863	2.0%
Other Historic Properties	57	67519	63944	5.6%
Outdoors/Nature Attractions	42	749400	619319	21.0%
Places of Worship/Spiritual Attractions	15	118057	112776	4.7%
Scottish Crafts/Retail Attractions	6	79368	83160	-4.6%
Transport-Related Attractions	11	32480	29072	11.7%
Wildlife/Animal Attractions	20	105275	100025	5.3%

### Year to Date 2025/2024

Ytd Admission By Category				
Category	No of Attractions	2025	2024	% Change
Activity Attractions	13	136857	146031	-6.3%
Castles/Forts	57	344634	356976	-3.5%
Distilleries/Breweries/Wineries	55	89826	94999	-5.5%
Gardens	27	178732	170066	5.1%
Heritage Centre	25	105754	76840	37.6%
Historic Houses/Palaces	46	160516	139875	14.8%
Industrial/Workplaces	9	32858	35577	-7.6%
Museums/Art Galleries	235	1854845	1808218	2.6%
Other Historic Properties	57	147694	116099	27.2%
Outdoors/Nature Attractions	42	1231555	946519	30.1%
Places of Worship/Spiritual Attractions	15	206884	193015	7.2%
Scottish Crafts/Retail Attractions	6	141625	139848	1.3%
Transport-Related Attractions	11	60251	53352	12.9%
Wildlife/Animal Attractions	20	168439	168368	0.0%

## By Admission Charges

### 2025 February (vs. 2024)

Admission By Admission				
Admission	No of Attractions	2025	2024	% Change
Free	267	1975001	1829225	8.0%
Paid	351	720272	772491	-6.8%
Total	618	2695273	2601716	3.6%

### Year to Date 2025/2024

Ytd Admission By Admission Type				
Admission	No of Attractions	2025	2024	% Change
Free	267	3511872	3126952	12.3%
Paid	351	1348598	1318831	2.3%
Total	618	4860470	4445783	9.3%

# PERFORMANCE

## By Volume of Visits

### 2025 February (vs. 2024)

Admission By Volume Visits				
Volume Visits	No of Attractions	2025	2024	% Change
0 - 4,999	204	6481	5622	15.3%
5,000 - 9,999	64	19000	13922	36.5%
10,000 - 19,999	89	42420	32324	31.2%
20,000 - 49,999	102	228246	145876	56.5%
50,000 - 99,999	62	180126	203192	-11.4%
100,000 +	97	2219000	2200780	0.8%

### Year to Date 2025/2024

Admission By Volume Visits				
Volume Visits	No of Attractions	2025	2024	% Change
0 - 4,999	204	11862	9545	24.3%
5,000 - 9,999	64	31119	23014	35.2%
10,000 - 19,999	89	76291	59275	28.7%
20,000 - 49,999	102	332131	225650	47.2%
50,000 - 99,999	62	324277	310737	4.4%
100,000 +	97	4084790	3817562	7.0%

## By Location/Density

### 2025 February (vs. 2024)

Admission By Urban Rural				
Urban/Rural	No of Attractions	2025	2024	% Change
Accessible Rural	124	226794	272317	-16.7%
Accessible Small Towns	41	330099	193291	70.8%
Large Urban Areas	121	1513975	1561887	-3.1%
Other Urban Areas	104	346527	325442	6.5%
Remote Rural	187	241461	212760	13.5%
Remote Small Towns	41	36417	36019	1.1%

### Year to Date 2025/2024

Ytd Admission By Urban Rural				
Urban/Rural	No of Attractions	2025	2024	% Change
Accessible Rural	124	437290	454123	-3.7%
Accessible Small Towns	41	405713	204500	98.4%
Large Urban Areas	121	2860717	2857507	0.1%
Other Urban Areas	104	647030	578269	11.9%
Remote Rural	187	446998	293769	52.2%
Remote Small Towns	41	62722	57615	8.9%

## By Geographic Area

### 2025 February (vs. 2024)

Admission By Location				
Location	No of Attractions	2025	2024	% Change
Coastal	159	406821	333904	21.8%
Inland	377	2260447	2247613	0.6%
Islands	82	28005	20199	38.7%

### Year to Date 2025/2024

Ytd Admission By Location				
Location	No of Attractions	2025	2024	% Change
Coastal	159	702697	580355	21.1%
Inland	377	4116494	3835659	7.3%
Islands	82	41279	29769	38.7%

# PERFORMANCE

## By Council Area

2024 February (vs. 2023)

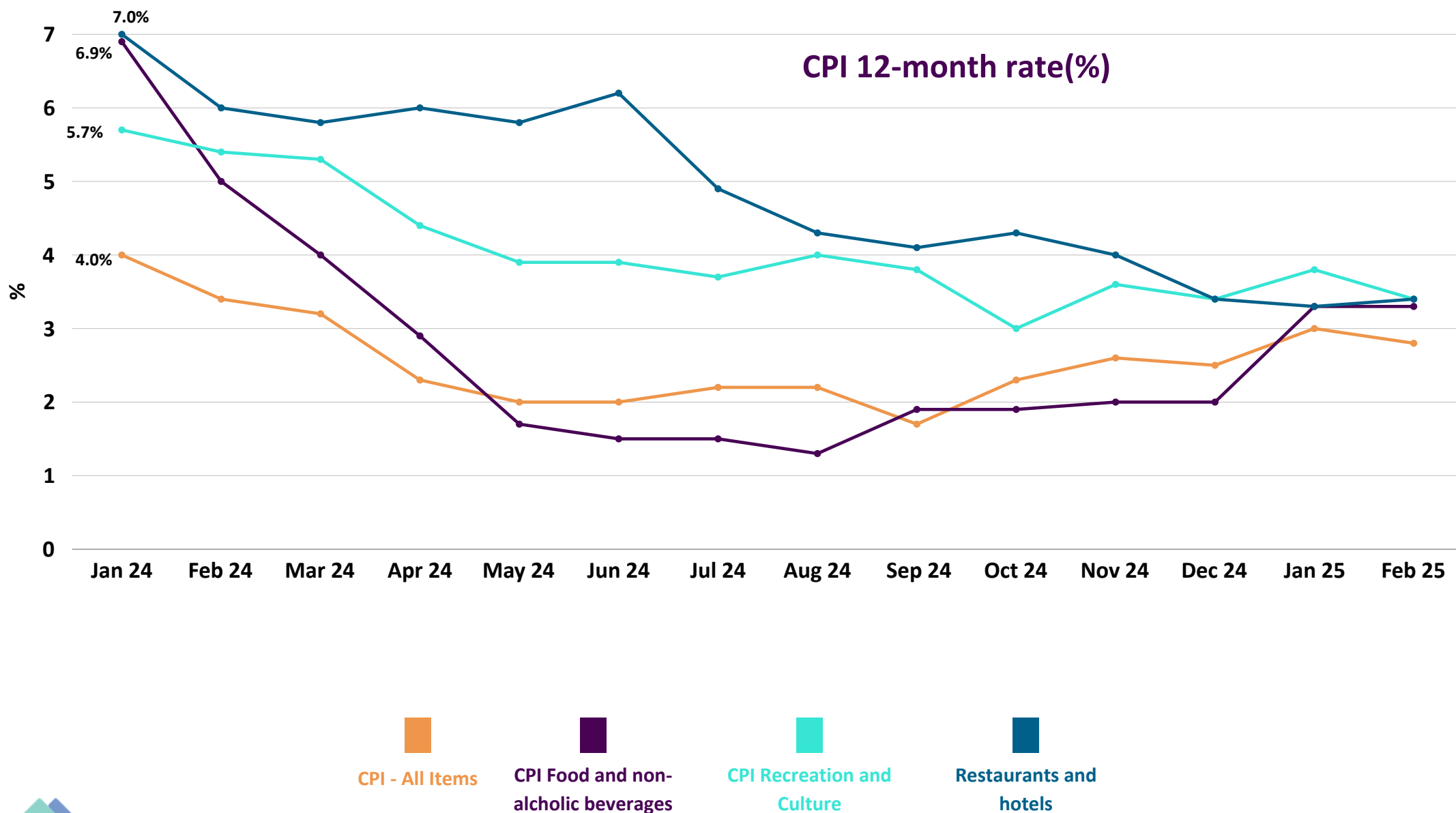
Admission By Council				
Council	No of Attractions	2025	2024	% Change
Aberdeen City	13	126192	141642	-10.9%
Aberdeenshire	42	73647	118049	-37.6%
Angus	18	6666	11010	-39.5%
Argyll & Bute	40	8847	9067	-2.4%
Clackmannanshire	4	1253	1598	-21.6%
Dumfries & Galloway	43	44796	35069	27.7%
Dundee City	12	74634	75652	-1.4%
East Ayrshire	8	12944	11119	16.4%
East Dunbartonshire	1	62988	60795	3.6%
East Lothian	20	38233	38040	0.5%
East Renfrewshire	3	73578	88741	-17.1%
Edinburgh, City of	55	843881	889500	-5.1%
Eilean Siar	12	2216	2611	-15.1%
Falkirk	10	67544	62665	7.8%
Fife	34	45297	42895	5.6%
Glasgow City	28	354141	332404	6.5%
Greater Glasgow	1	0	0	0.0%
Highland	65	203526	99127	105.3%
Inverclyde	2	224	83	169.9%
Midlothian	4	8403	8756	-4.0%
Moray	25	13119	17486	-25.0%
North Ayrshire	9	23111	12885	79.4%
North Lanarkshire	4	15723	15292	2.8%
Orkney Islands	22	7508	7873	-4.6%
Perth & Kinross	29	332783	254846	30.6%
Renfrewshire	9	28837	28447	1.4%
Scottish Borders	31	11651	19266	-39.5%
Shetland Islands	18	2976	3550	-16.2%
South Ayrshire	9	28961	37298	-22.4%
South Lanarkshire	10	11255	17176	-34.5%
Stirling	20	64875	54371	19.3%
West Dunbartonshire	7	76709	80137	-4.3%
West Lothian	10	28755	24266	18.5%

2024 Year to Date (vs. 2023)

Admission By Council				
Council	No of Attractions	2025	2024	% Change
Aberdeen City	13	235998	253670	-7.0%
Aberdeenshire	42	146144	157129	-7.0%
Angus	18	11467	13332	-14.0%
Argyll & Bute	40	14960	13162	13.7%
Clackmannanshire	4	1799	1894	-5.0%
Dumfries & Galloway	43	73342	57635	27.3%
Dundee City	12	137634	141333	-2.6%
East Ayrshire	8	22577	20866	8.2%
East Dunbartonshire	1	126448	133190	-5.1%
East Lothian	20	82836	68835	20.3%
East Renfrewshire	3	150190	169656	-11.5%
Edinburgh, City of	55	1620137	1634445	-0.9%
Eilean Siar	12	2880	3010	-4.3%
Falkirk	10	135367	121614	11.3%
Fife	34	90044	79535	13.2%
Glasgow City	28	622890	588489	5.9%
Greater Glasgow	1	0	0	0.0%
Highland	65	363331	165678	119.3%
Inverclyde	2	249	149	67.1%
Midlothian	4	10821	16062	-32.6%
Moray	25	22593	26744	-15.5%
North Ayrshire	9	34822	24471	42.3%
North Lanarkshire	4	24748	25861	-4.3%
Orkney Islands	22	12359	11690	5.7%
Perth & Kinross	29	441227	269573	63.7%
Renfrewshire	9	54520	53136	2.6%
Scottish Borders	31	23990	22543	6.4%
Shetland Islands	18	6108	6377	-4.2%
South Ayrshire	9	74388	67515	10.2%
South Lanarkshire	10	23023	29664	-22.4%
Stirling	20	108957	91310	19.3%
West Dunbartonshire	7	138516	136561	1.4%
West Lothian	10	46105	40654	13.4%

# CONSUMER PRICE INFLATION - OVERVIEW

CPI January 2024 - February 2025



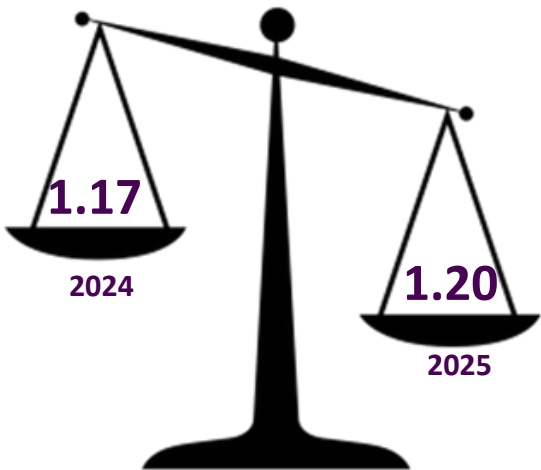
# CURRENCY - OVERVIEW

## Currency Trends



£ GBP to € EUR

February  
2025 vs. 2024



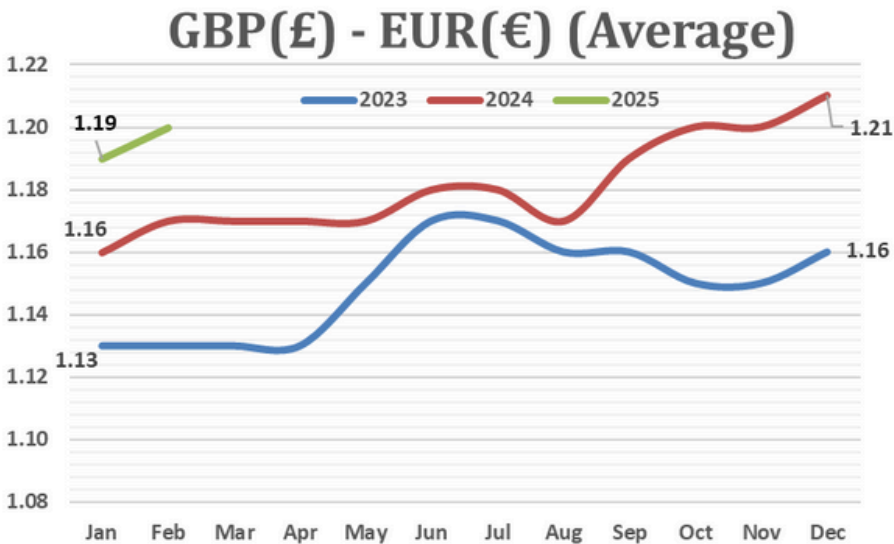
£ GBP to \$ USD

February  
2025 vs. 2024

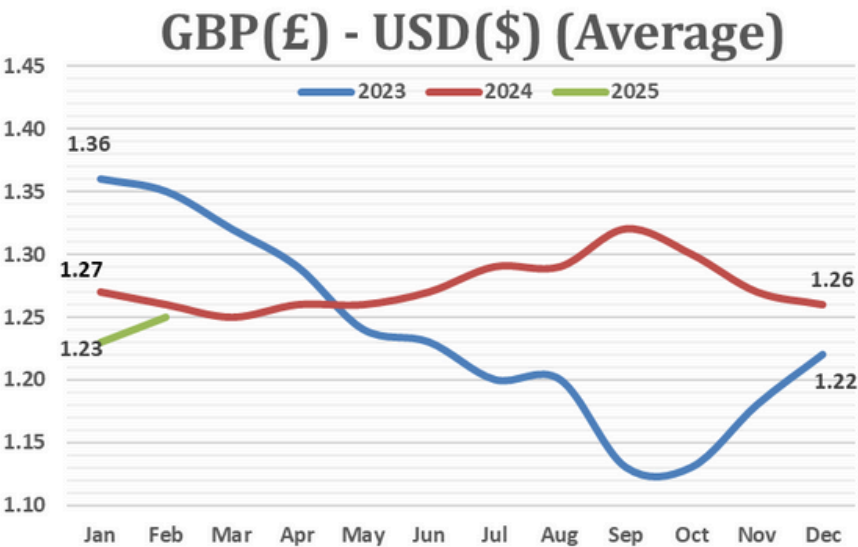


Source: [www.ofx.com](http://www.ofx.com)

£ GBP to € EUR - 3 Year Average



£ GBP to \$ USD - 3 Year Average



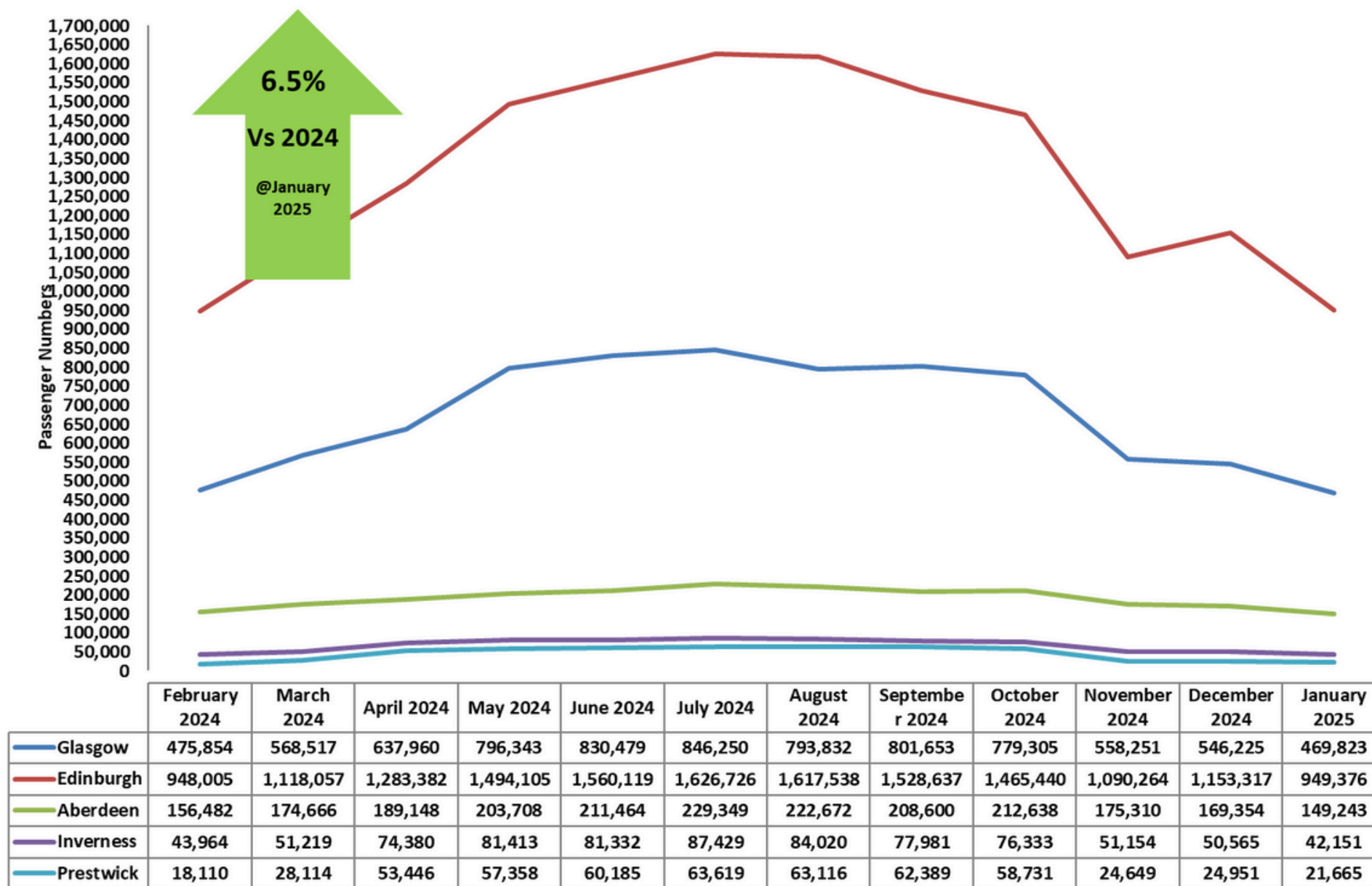
# AIRPORT PASSENGER - OVERVIEW



## Top Five Scottish Airports

Source: Civil Aviation Authority

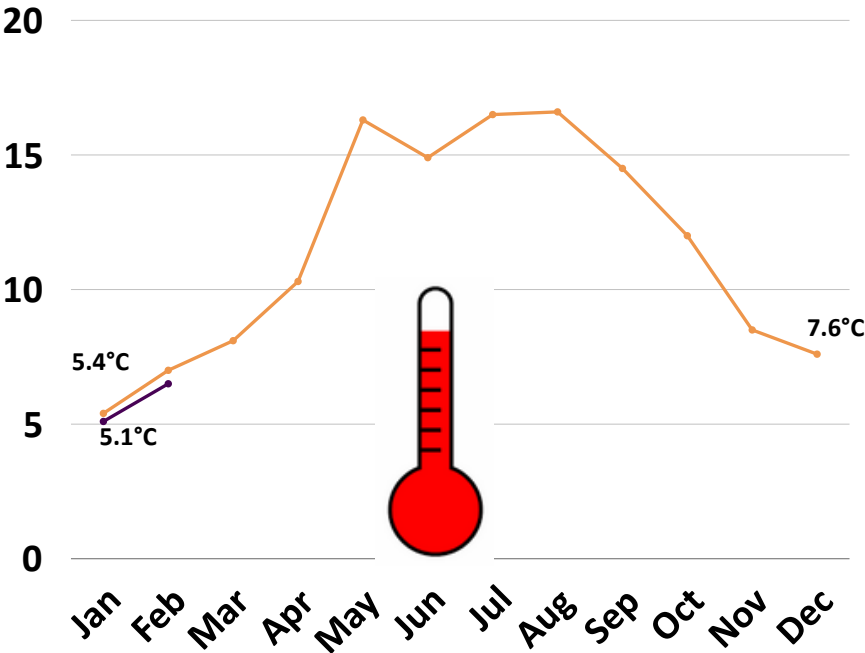
### Terminal & Transit Passengers at Scotland's Five Main Airports



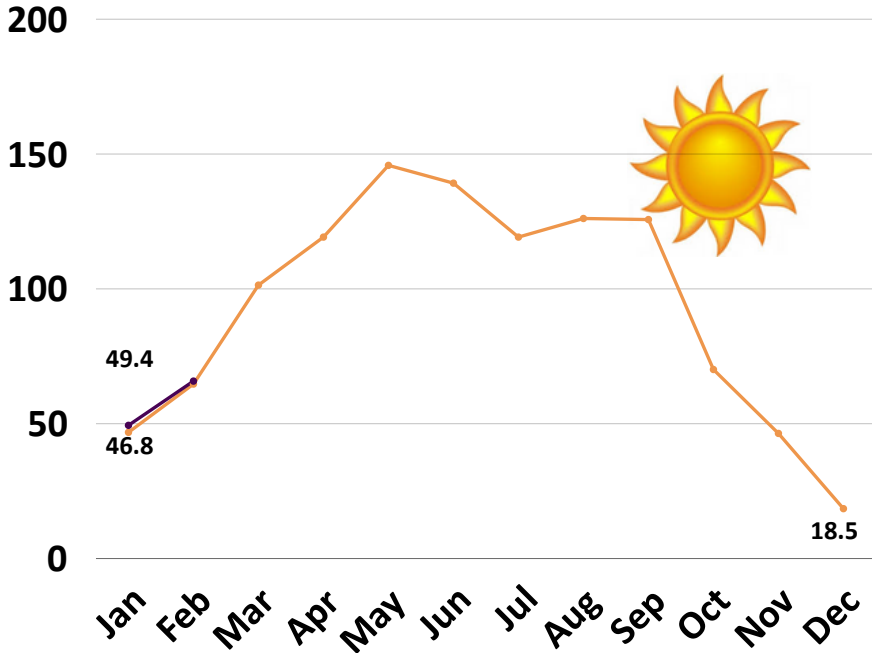


# WEATHER: SCOTLAND - OVERVIEW

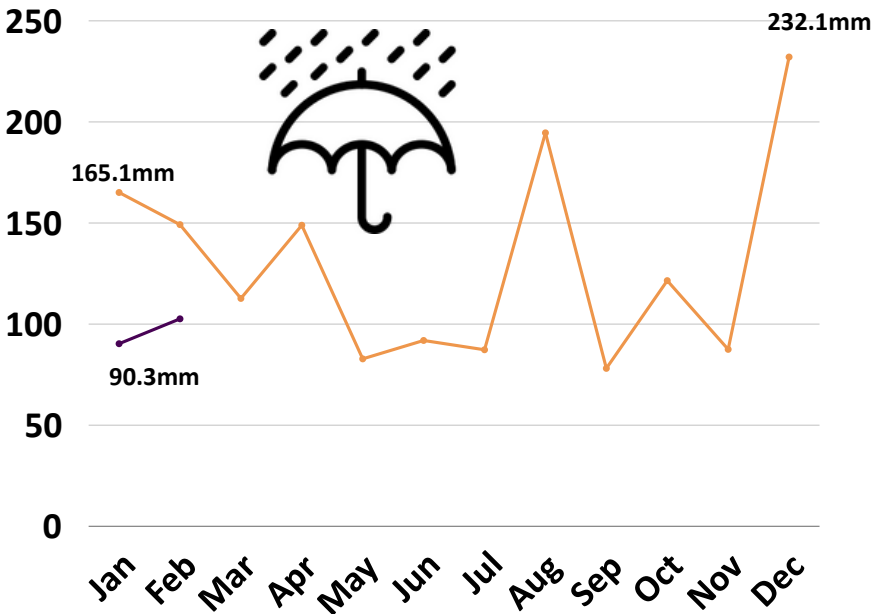
Average Temperature



Average Hours of Sunshine



Average Rainfall



# NOTES - 2025

1. On Thursday the 23rd of January 2025, a rare red weather warning was activated as Storm Éowyn battered the central belt and southern Scotland. The Met Office stated that Éowyn was “probably” the strongest storm to hit the UK in at least 10 years. Damage was caused to many attractions including the Battle of Bannockburn Visitor Centre and Falkland Palace.

# 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).
6. The Visitor Levy (Scotland) Act 2024 became legislation on the 20th of September 2024. The City of Edinburgh Council have completed a 12 week public consultation and if agreed by Councillors on 24th January Edinburgh's Visitor Levy charge will start being applied to bookings made on and after 1 May 2025 to stay in overnight accommodation in the city on and after 24 July 2026.



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