SCOTTISH VISITOR ATTRACTION BAROMETER

JANUARY 2025

EDITION

25/24

GCU Glasgow Caledonian University

University for the Common Good

Moffat Centre

https://ngagetechnology.net

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SCOTLAND OVERVIEW

593

Comparable Attractions

January 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 January 2025 and January 2024. Some 595 attraction operators provided figures for January 2025 with 593 attractions providing comparable visits figures. The total number of visits for the responding 593 barometer attractions in Scotland for January 2025 was 2,179,725 Compared to data from the previous year of 1,890,087 visits, this shows a visit increase of 15.3%.

15.3%

National visits compared to January 2024

2,179,725

Total Visits in January 2025

15.3%

National visits year to date vs. 2024

2,179,725

Total Visits in 2025 to date

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EXECUTIVE SUMMARY

The January 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 15.3% increase in visitors in January 2024 compared to the same time in 2023.

Accessible Small Towns saw a significant increase in visits compared to January 2025, and the Perth & Kinross Local Authority area (reporting 3+ attractions) saw a 649.6% increase, compared to January 2024. Looking at specific sectors, the Heritage Centre (67.7%) and Historic Houses/Palaces (65.2%) categories continued to record the most substantial visitor growth. Attractions in the Activity Attractions category showed a 21.1% decrease in visits compared to the same period in 2024.

On Thursday the 23rd of January 2025, a rare red weather warning was activated as Storm Éowyn battered the central belt and southern Scotland, damaged was caused to many attractions including the Battle of Bannockburn Visitor Centre and Falkland Palace.

The consumer backdrop shows the latest Inflation Figures from the Office of National Statistics, UK CPI (consumer prices inflation) in the 12 months to January 2025 is 3.0%, up from 2.5% in December 2024. The CPI 12-month rate (%) for January 2025 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.8% up from 3.4% in December 204. Inflation rates for restaurants and cafes were 3.3% down from 3.4% in December 2024.

Data from the Scottish Retail Consortium showed that total retail sales in Scotland increased by 1.5% in January 2025 compared to the same period in 2024, however, compared to the 1.9% increase in December 2024 this was disappointing growth in total sales. Total food sales increased by 2.5% compared to the monthly performance of January 2024.

EXECUTIVE SUMMARY

Domestic consumer sentiment published by the GB National Tourist Boards covering January 2025 found that 19% of respondents said they had "…been hit hard - no option but to cut back on spending" (no change on the December 2024 survey). The survey recorded 47% of respondents (a 1% increase on the December 2024 Survey) saying they were "…cautious - things are ok but I feel I have to be very careful".

Despite consumer concern about the state of the economy, 23% of UK adults intended to take a domestic overnight trip in the first quarter of 2025 and 80% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (79%). However, the three key barriers to taking an overnight UK trip in the next six months continue to be the UK weather, rising cost of living, and personal finances. The figures as mentioned earlier have been consistent across previously published GB National Tourist Surveys (VisitBritain 2025), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

Globally, the International Air Transport Association (IATA) reported that for January 2025 global air passenger demand, measured by revenue per kilometer, was up 10.0% compared to January 2024. International demand rose 12.4% over the same period with domestic demand increasing 6.1%. Europe region was the biggest global air passenger growth driver in January 2024 at 23.5% when compared to Asia-Pacific at 16.8%.

Chris Greenwood
Senior Research Fellow
Moffat Centre for Travel and Tourism Business Development
Glasgow School for Business and Society
Glasgow Caledonian University

HIGHLIGHTS

The largest percentage increase in visits recorded by former VisitScotland Regions for January 2025 was experienced by visitor attractions in the Perthshire Region.

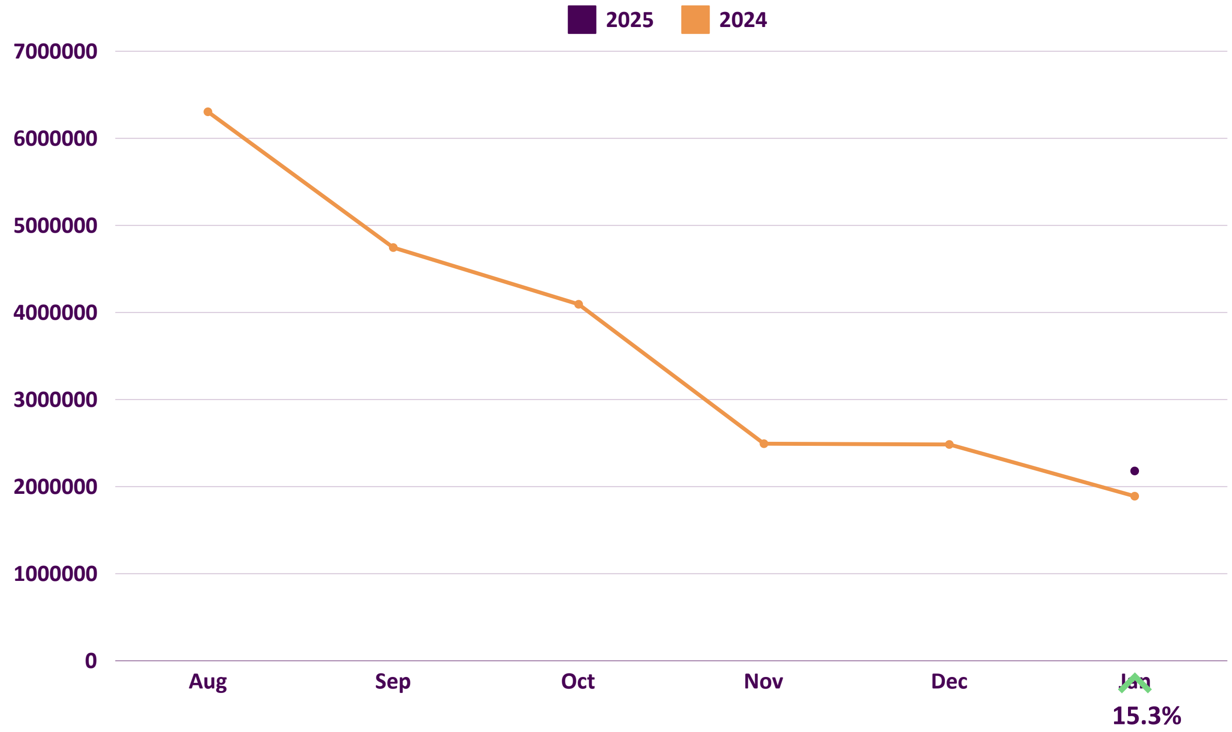
The largest percentage decrease in visits recorded by former VisitScotland Regions for January 2025 was experienced by visitor attractions in the Angus & City of Dundee Region.

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

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

Attractions in the Activity Attractions category recorded the greatest percentage decrease in visits compared to January 2024.

Monthly Comparison



Attractions welcoming between 50,000 and 99,999 visits per year experienced the largest increase when comparing January 2025 with January 2024.

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

The most significant percentage increase in visits by Council Area (reporting 3+ attractions) was experienced by attractions in the Perth & Kinross Area followed by the Scottish Borders Area. Visitor Attractions in the Midlothian Area experienced the most significant percentage decrease in visits when comparing January 2025 with January 2024.

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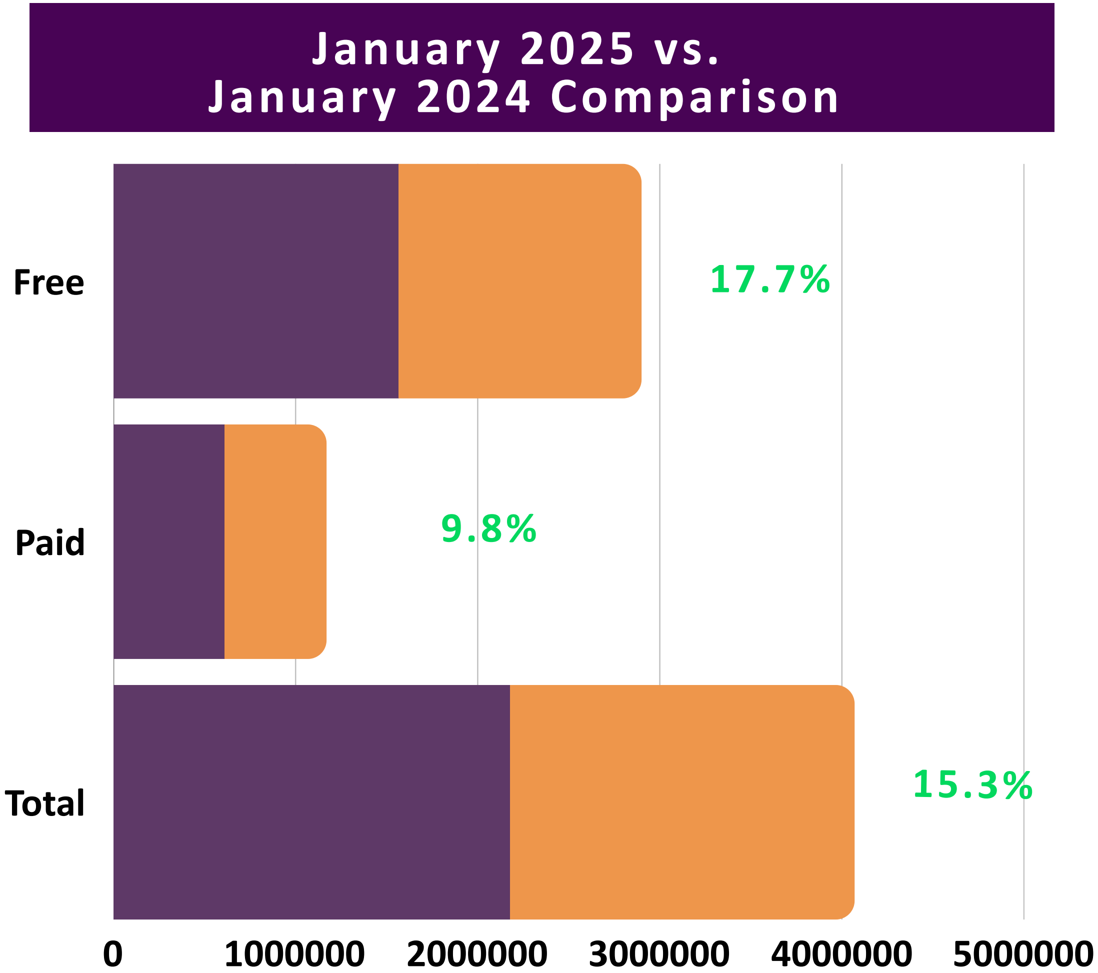
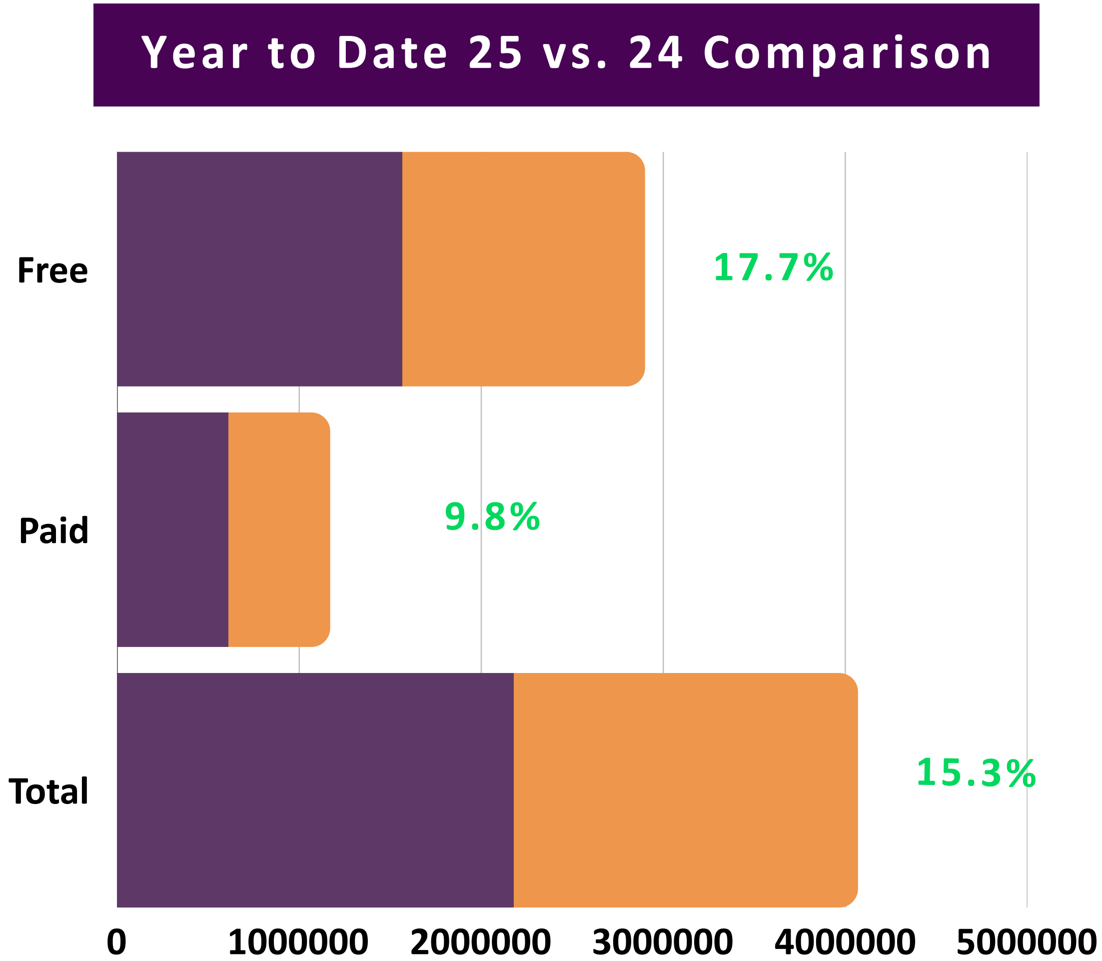
ADMISSIONS

Policy Overview

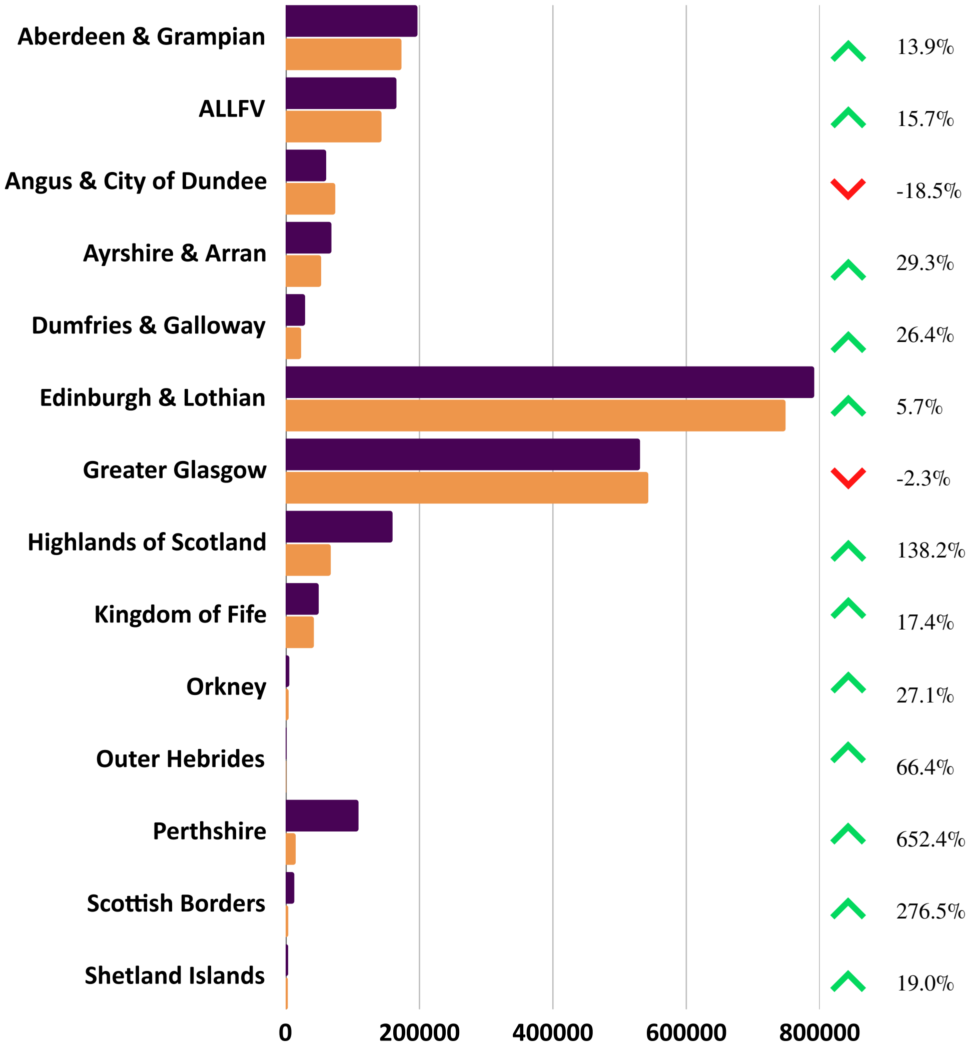




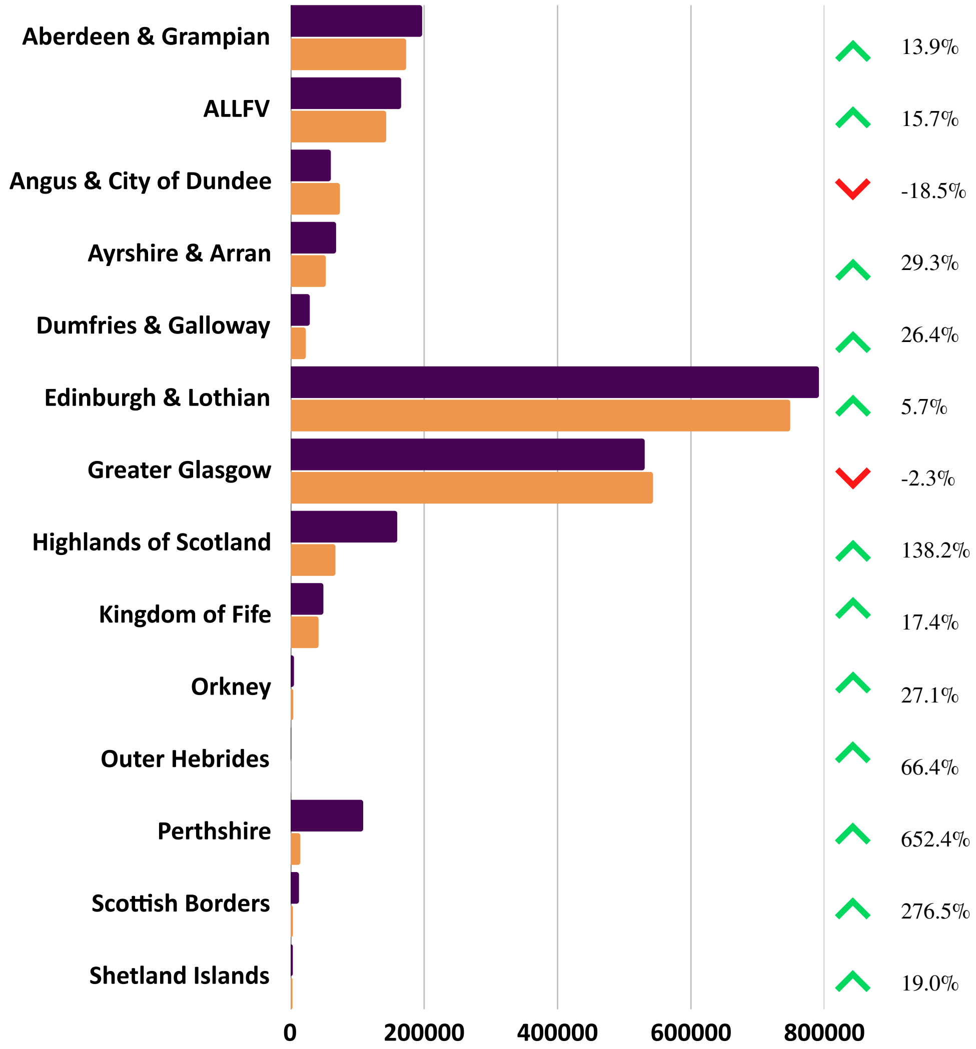
PERFORMANCE

By Former Visit Scotland Area

2025 January (vs. 2024)



2025 Year to Date (vs. 2024)

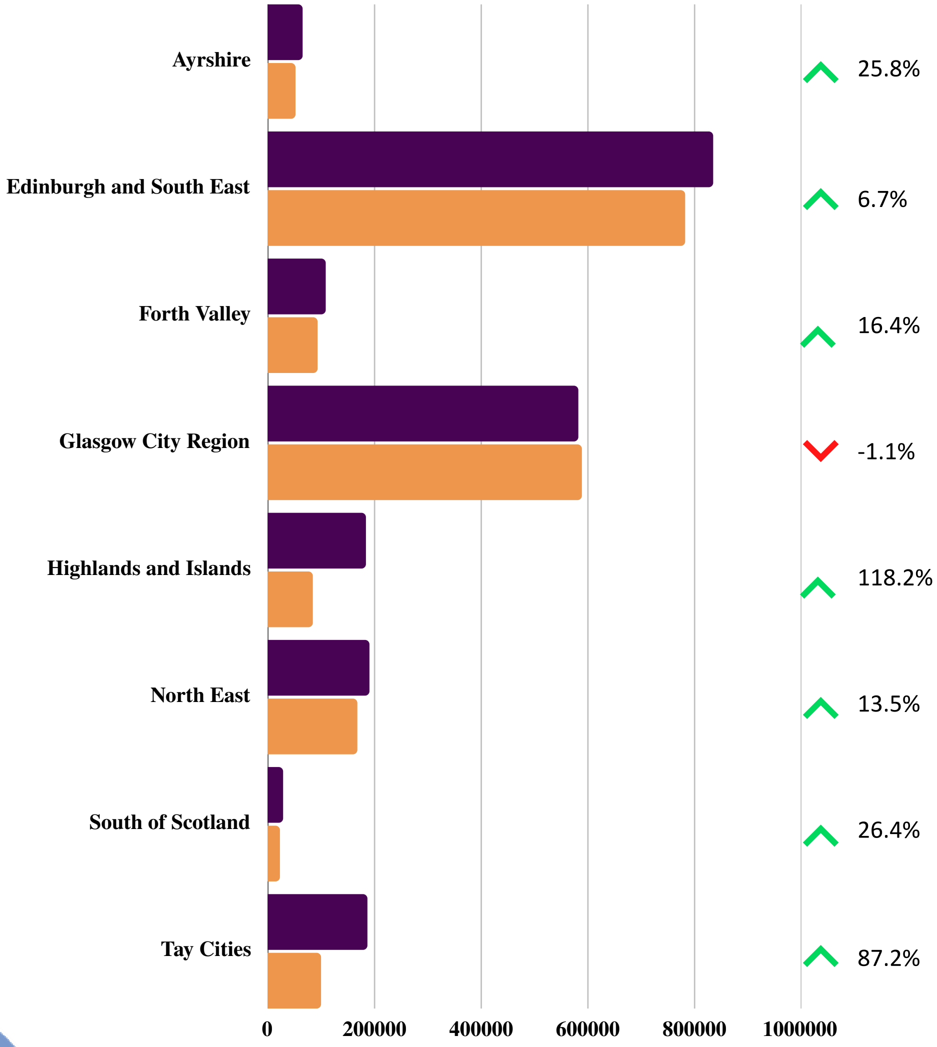


2025 2024

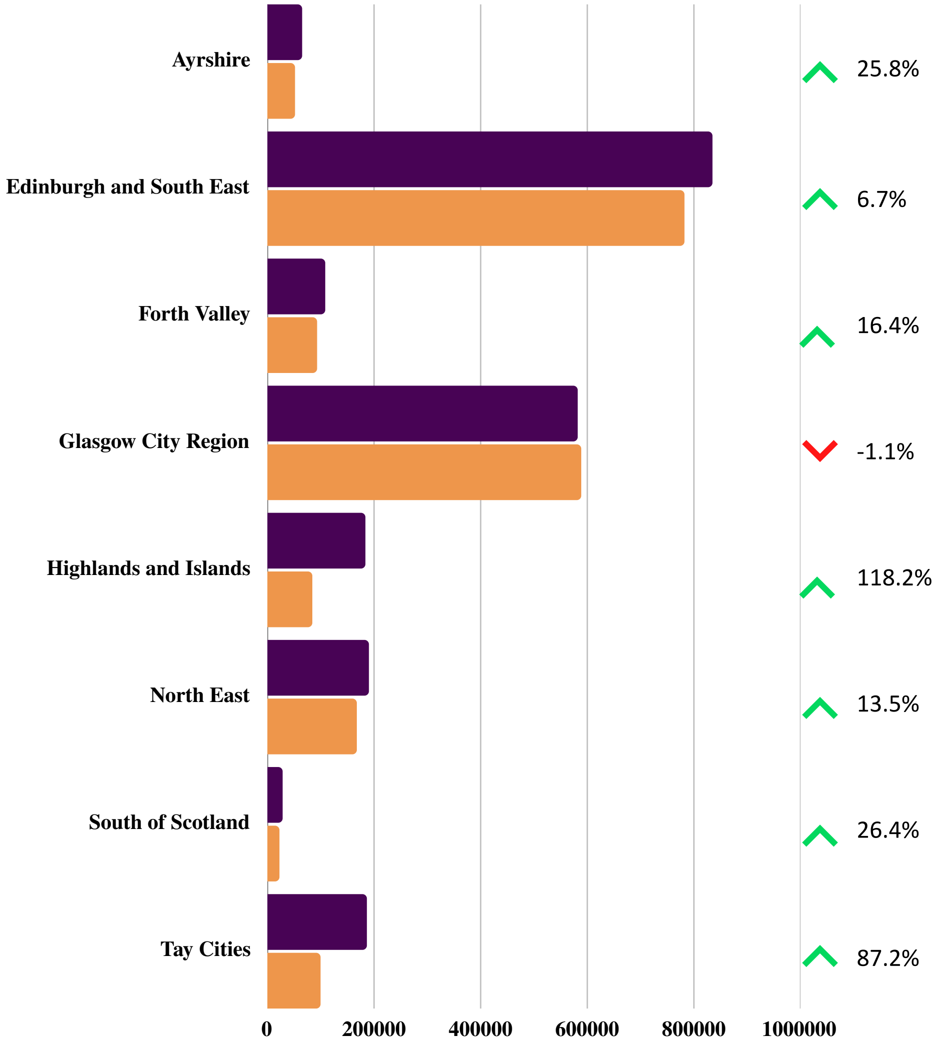
PERFORMANCE

By Regional Economic Partnerships

2025 January (vs. 2024)



2025 Year to Date (vs. 2024)



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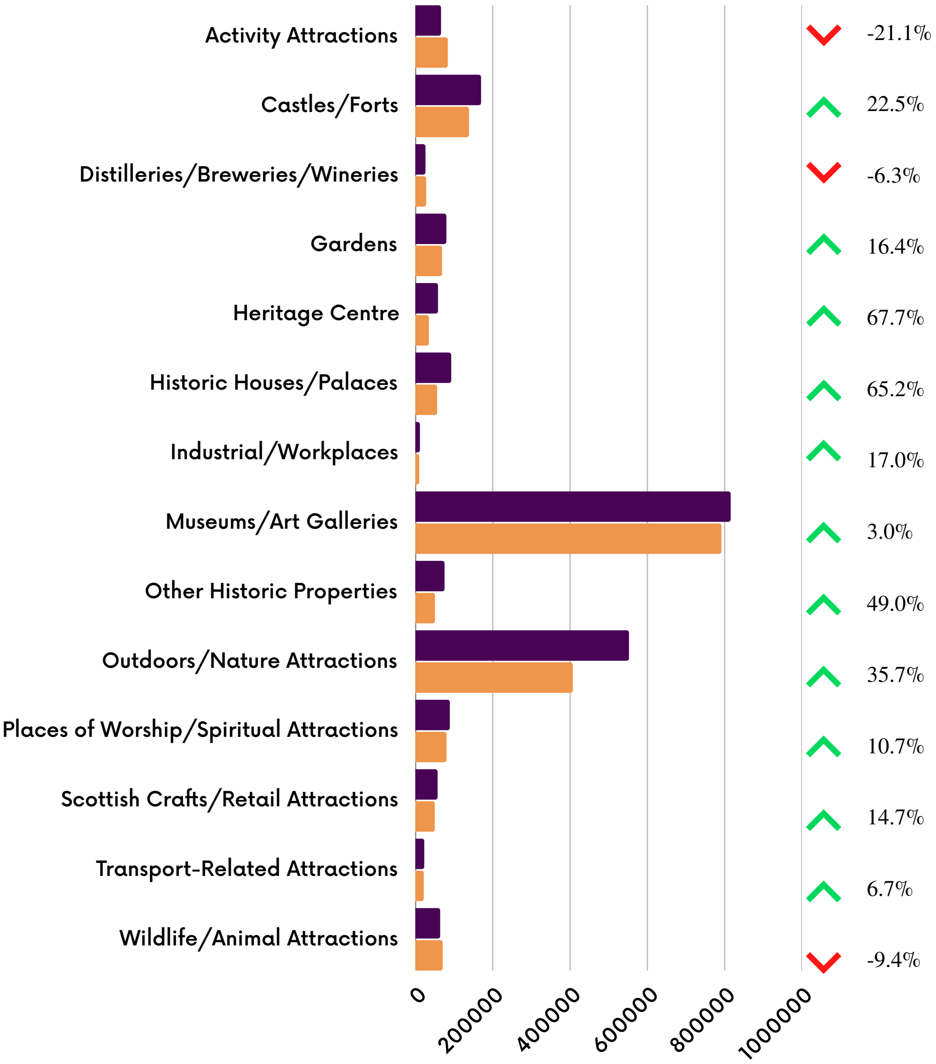
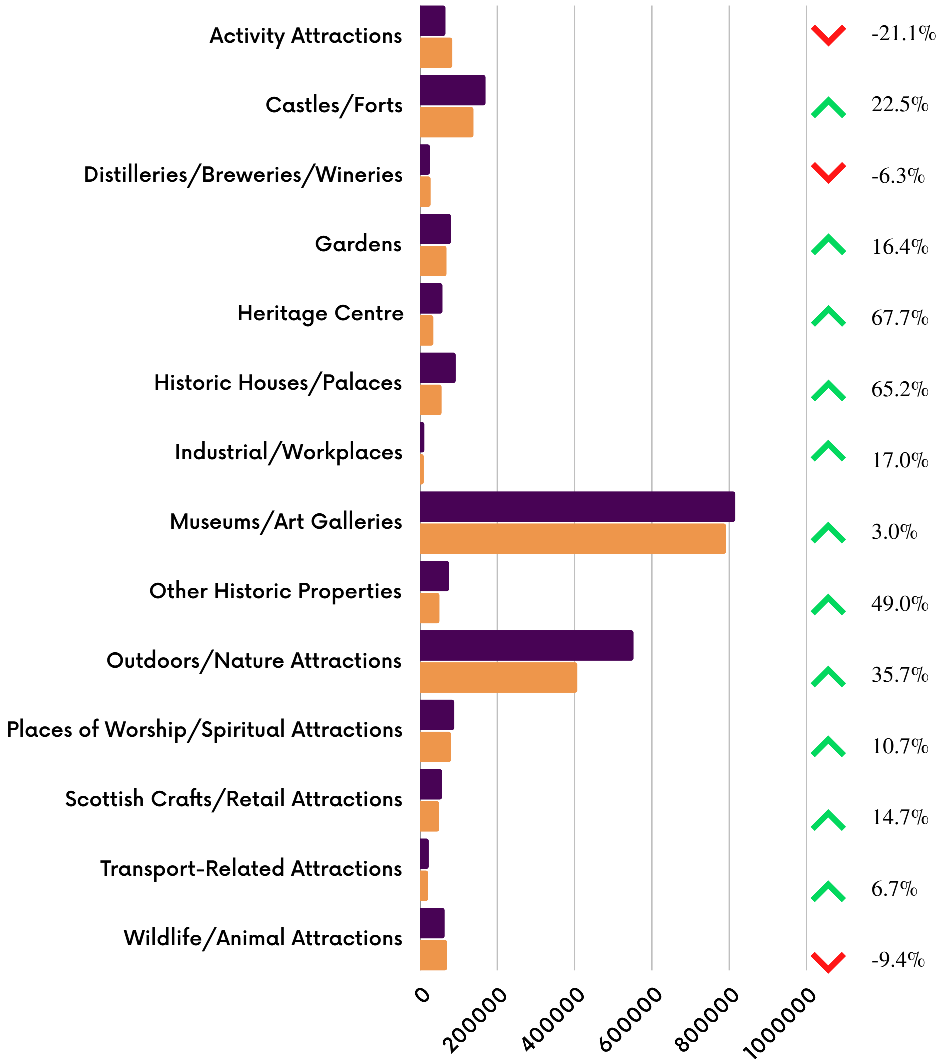
PERFORMANCE

By Attraction Category

2025 January (vs. 2024)



2025 Year to Date (vs. 2024)



2025 2024

PERFORMANCE

By Location Accessibility & Density

2025 January (vs. 2024)

15% Accessible Rural	251% Accessible Small Towns
3% Large Urban Areas	13% Other Urban Areas
116% Remote Rural	21% Remote Small Towns

2025 Year to Date (vs. 2024)

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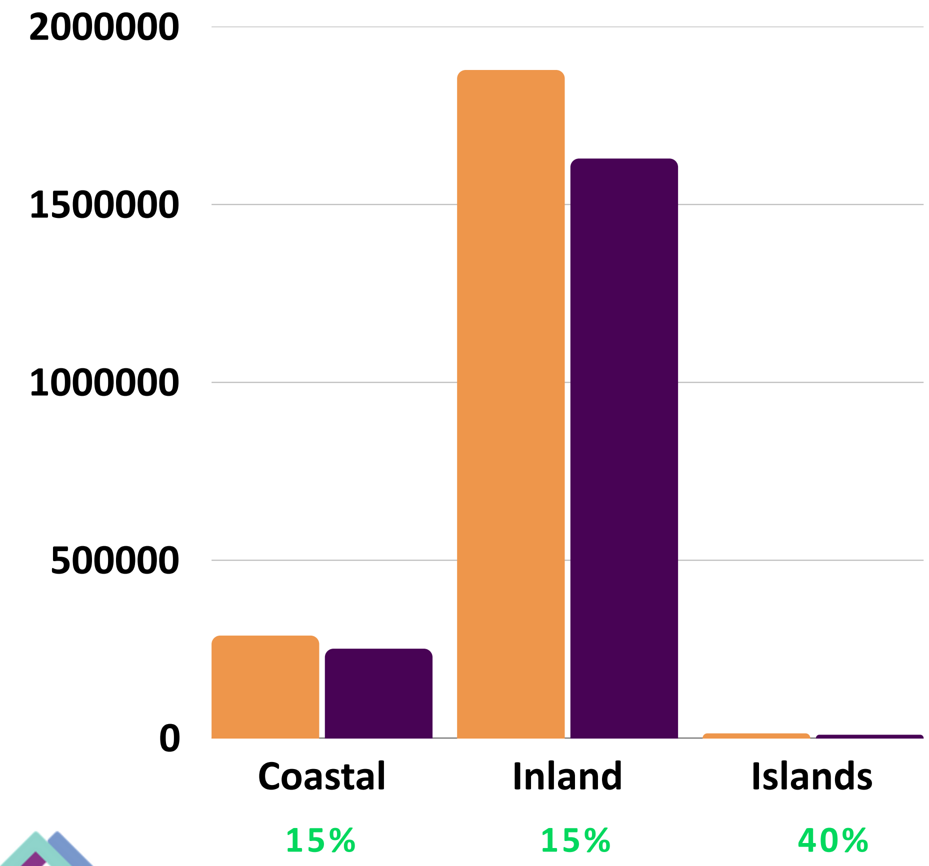
2025 2024

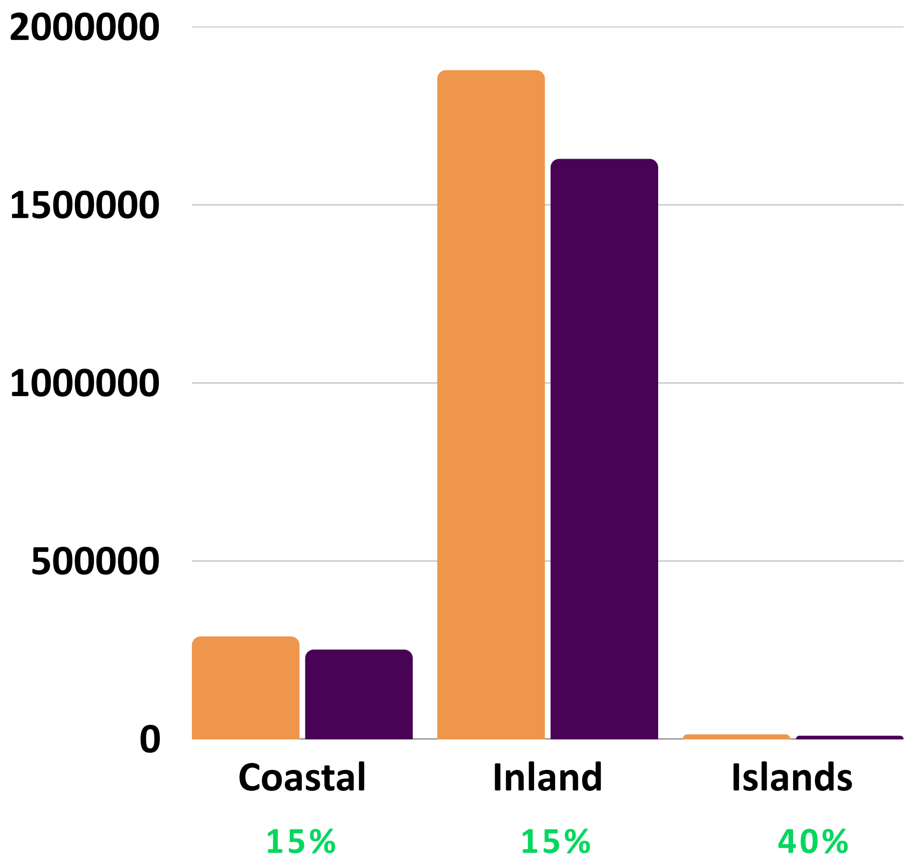
PERFORMANCE

By Geographic Location

2025 January (vs. 2024)



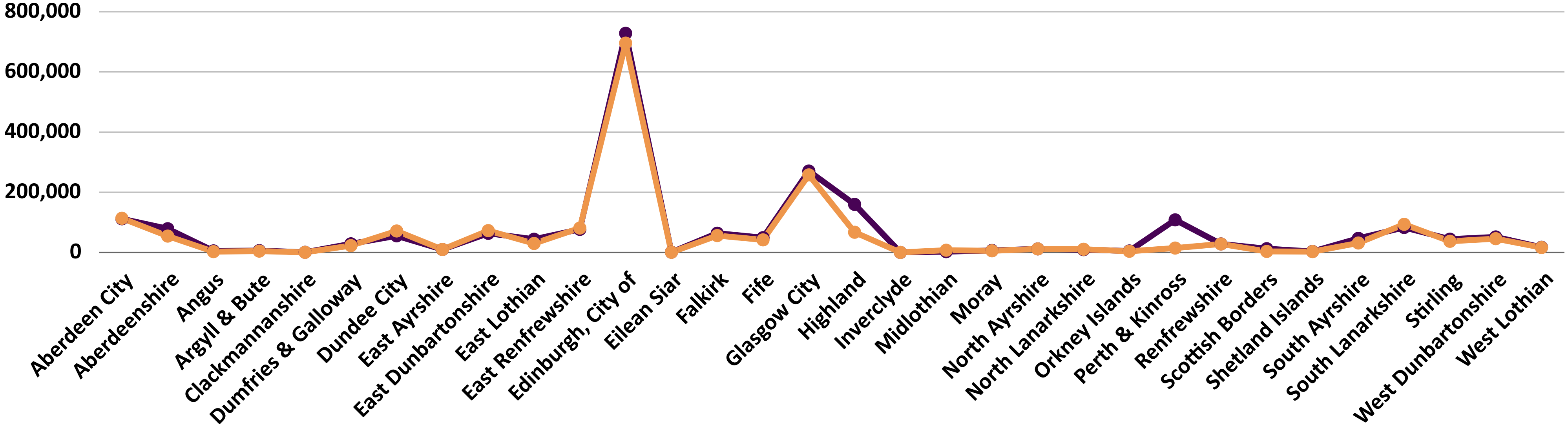
2025 Year to Date (vs. 2024)



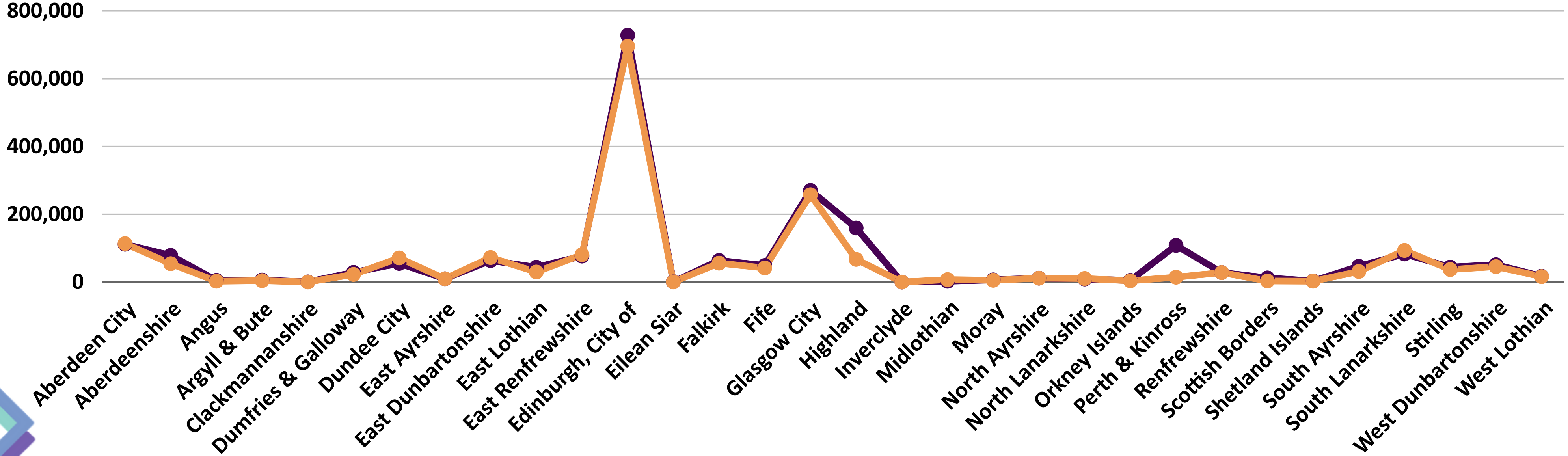
PERFORMANCE

By Council Area

2025 January (vs. 2024)



2024 Year to Date (vs. 2023)



PERFORMANCE

By Visit Scotland Area

2025 January (vs. 2024)

Admission By Region				
Region	No of Attractions	2025	2024	% Change
Aberdeen & Grampian	80	196994	172995	13.9%
ALLFV	78	165470	143063	15.7%
Angus & City of Dundee	29	60133	73766	-18.5%
Ayrshire & Arran	27	67999	52599	29.3%
Dumfries & Galloway	44	28535	22568	26.4%
Edinburgh & Lothian	71	791776	748790	5.7%
Greater Glasgow	60	530624	543031	-2.3%
Highlands of Scotland	62	159659	67024	138.2%
Kingdom of Fife	35	48947	41692	17.4%
Orkney	21	4851	3817	27.1%
Outer Hebrides	12	664	399	66.4%
Perthshire	26	108602	14434	652.4%
Scottish Borders	31	12339	3277	276.5%
Shetland Islands	17	3132	2632	19.0%

Year to Date 2025/2024

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By Regional Economic Partnerships

2025 January (vs. 2024)

Admission By Sgrep				
SGREP	No of Attractions	2025	2024	% Change
Ayrshire	22	65123	51772	25.8%
Edinburgh and South East	117	834820	782293	6.7%
Forth Valley	33	108451	93184	16.4%
Glasgow City Region	65	582016	588665	-1.1%
Highlands and Islands	184	183809	84234	118.2%
North East	54	190394	167705	13.5%
South of Scotland	44	28535	22568	26.4%
Tay Cities	74	186577	99666	87.2%

Year to Date 2025/2024

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PERFORMANCE

By Attraction Category

2025 January (vs. 2024)

Admission By Category				
Category	No of Attractions	2025	2024	% Change
Activity Attractions	12	66071	83685	-21.1%
Castles/Forts	56	169675	138462	22.5%
Distilleries/Breweries/Wineries	52	25858	27598	-6.3%
Gardens	26	79970	68691	16.4%
Heritage Centre	25	58306	34762	67.7%
Historic Houses/Palaces	46	92517	55995	65.2%
Industrial/Workplaces	9	11467	9803	17.0%
Museums/Art Galleries	220	815642	791690	3.0%
Other Historic Properties	53	75205	50485	49.0%
Outdoors/Nature Attractions	43	552455	407090	35.7%
Places of Worship/Spiritual Attractions	15	88827	80239	10.7%
Scottish Crafts/Retail Attractions	4	57199	49883	14.7%
Transport-Related Attractions	10	22710	21280	6.7%
Wildlife/Animal Attractions	22	63823	70424	-9.4%

Year to Date 2025/2024

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Wildlife/Animal Attractions	22	63823	70424	-9.4%

By Admission Charges

2025 January (vs. 2024)

Admission By Admission				
Admission	No of Attractions	2025	2024	% Change
Free	253	1567540	1332278	17.7%
Paid	340	612185	557809	9.8%
Total	593	2179725	1890087	15.3%

Year to Date 2025/2024

Admission By Admission				
Admission	No of Attractions	2025	2024	% Change
Free	253	1567540	1332278	17.7%
Paid	340	612185	557809	9.8%
Total	593	2179725	1890087	15.3%

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PERFORMANCE

By Volume of Visits

2025 January (vs. 2024)

Admission By Volume Visits				
VolumeVisits	No of Attractions	2025	2024	% Change
0 - 4,999	180	4961	3798	30.6%
5,000 - 9,999	70	7598	6484	17.2%
10,000 - 19,999	82	31490	28271	11.4%
20,000 - 49,999	104	113805	99299	14.6%
50,000 - 99,999	66	152740	106440	43.5%
100,000 +	91	1869131	1645795	13.6%

Year to Date 2025/2024

Admission By Volume Visits				
VolumeVisits	No of Attractions	2025	2024	% Change
0 - 4,999	180	4961	3798	30.6%
5,000 - 9,999	70	7598	6484	17.2%
10,000 - 19,999	82	31490	28271	11.4%
20,000 - 49,999	104	113805	99299	14.6%
50,000 - 99,999	66	152740	106440	43.5%
100,000 +	91	1869131	1645795	13.6%

By Location/Density

2025 January(vs. 2024)

Admission By Urban Rural				
UrbanRural	No of Attractions	2025	2024	% Change
Accessible Rural	128	218870	190943	14.6%
Accessible Small Towns	41	86423	24656	250.5%
Large Urban Areas	104	1283154	1240709	3.4%
Other Urban Areas	98	353422	313974	12.6%
Remote Rural	181	211753	98250	115.5%
Remote Small Towns	41	26103	21555	21.1%

Year to Date 2025/2024

Admission By Urban Rural				
UrbanRural	No of Attractions	2025	2024	% Change
Accessible Rural	128	218870	190943	14.6%
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Other Urban Areas	98	353422	313974	12.6%
Remote Rural	181	211753	98250	115.5%
Remote Small Towns	41	26103	21555	21.1%

By Geographic Area

2025 January (vs. 2024)

Admission By Location				
Location	No of Attractions	2025	2024	% Change
Coastal	152	288253	251415	14.7%
Inland	360	1878098	1629147	15.3%
Islands	81	13374	9525	40.4%

Year to Date 2025/2024

Admission By Location				
Location	No of Attractions	2025	2024	% Change
Coastal	152	288253	251415	14.7%
Inland	360	1878098	1629147	15.3%
Islands	81	13374	9525	40.4%

PERFORMANCE

By Council Area

2024 January (vs. 2023)

Admission By Council				
Council	No of Attractions	2025	2024	% Change
Aberdeen City	14	111665	113455	-1.6%
Aberdeenshire	40	78729	54250	45.1%
Angus	18	5080	2549	99.3%
Argyll & Bute	41	6027	4245	42.0%
Clackmannanshire	4	546	296	84.5%
Dumfries & Galloway	44	28535	22568	26.4%
Dundee City	10	55053	71217	-22.7%
East Ayrshire	8	9633	9747	-1.2%
East Dunbartonshire	1	63460	72395	-12.3%
East Lothian	17	43840	29670	47.8%
East Renfrewshire	3	76612	80915	-5.3%
Edinburgh, City of	41	728363	695706	4.7%
Eilean Siar	12	664	399	66.4%
Falkirk	9	63823	55949	14.1%
Fife	35	48947	41692	17.4%
Glasgow City	29	270423	257675	5.0%
Highland	62	159659	67024	138.2%
Inverclyde	2	25	66	-62.1%
Midlothian	4	2418	7306	-66.9%
Moray	26	6600	5290	24.8%
North Ayrshire	9	11711	11586	1.1%
North Lanarkshire	4	9025	10569	-14.6%
Orkney Islands	21	4851	3817	27.1%
Perth & Kinross	26	108202	14434	649.6%
Renfrewshire	9	28190	28009	0.7%
Scottish Borders	31	12339	3277	276.5%
Shetland Islands	17	3132	2632	19.0%
South Ayrshire	10	46655	31266	49.2%
South Lanarkshire	11	82889	93402	-11.3%
Stirling	20	44082	36939	19.3%
West Dunbartonshire	5	51392	45634	12.6%
West Lothian	9	17155	16108	6.5%

2024 Year to Date (vs. 2023)

Admission By Council				
Council	No of Attractions	2025	2024	% Change
Aberdeen City	14	111665	113455	-1.6%
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West Dunbartonshire	5	51392	45634	12.6%
West Lothian	9	17155	16108	6.5%

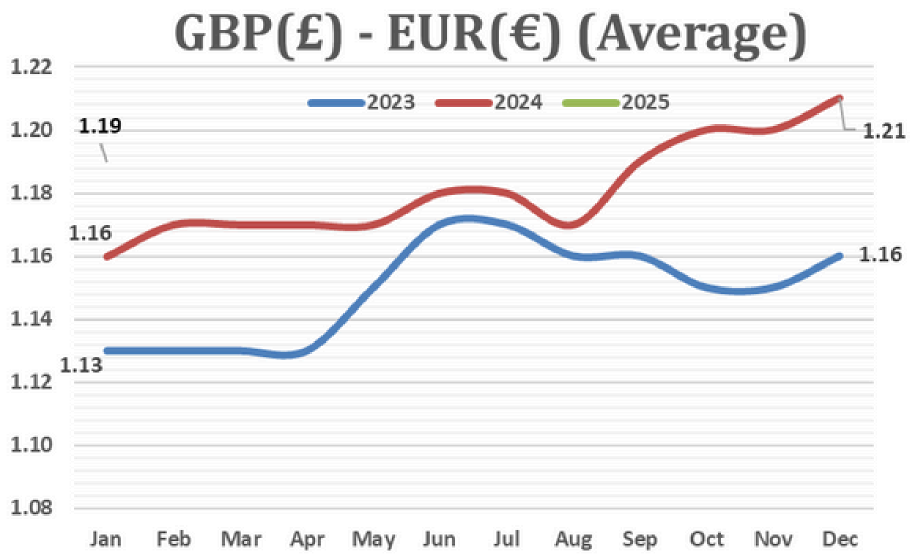
CURRENCY - OVERVIEW

Currency Trends

£ GBP to € EUR

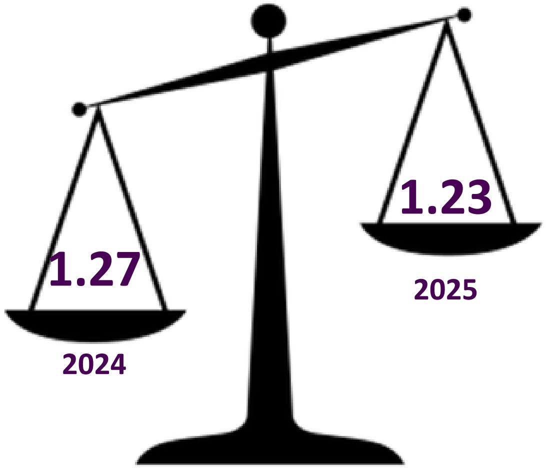
January
2025 vs. 2024

£ GBP to € EUR - 3 Year Average

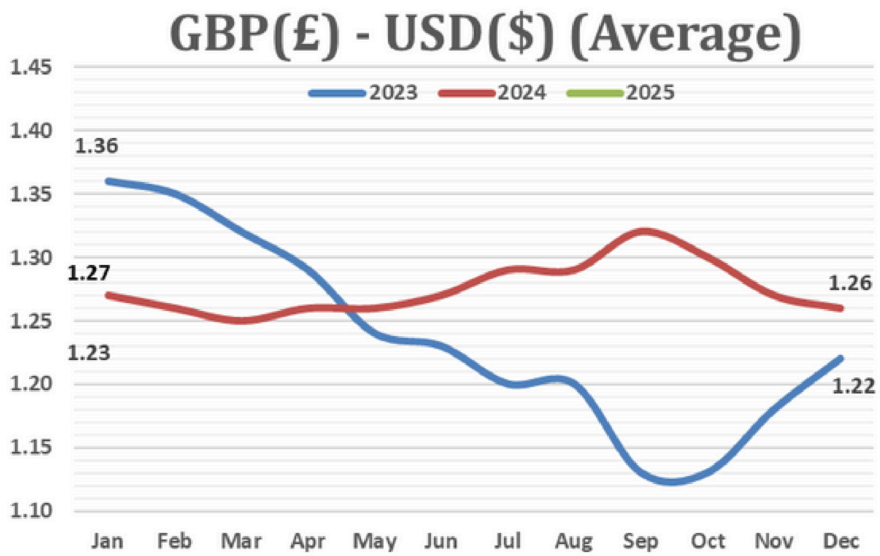


£ GBP to $ USD

January
2025 vs. 2024



£ GBP to $ USD - 3 Year Average



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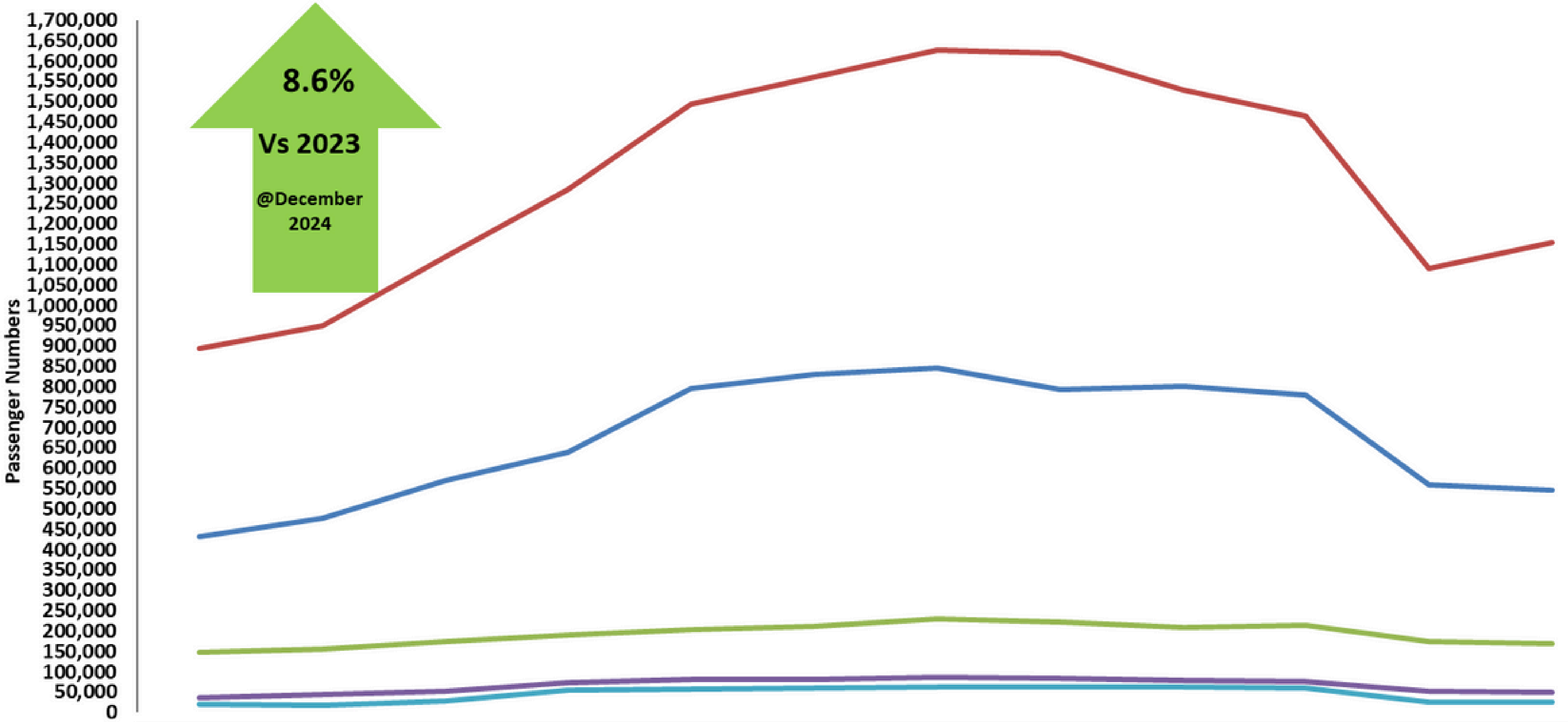
Source: www.ofx.com

AIRPORT PASSENGER - OVERVIEW

Top Five Scottish Airports

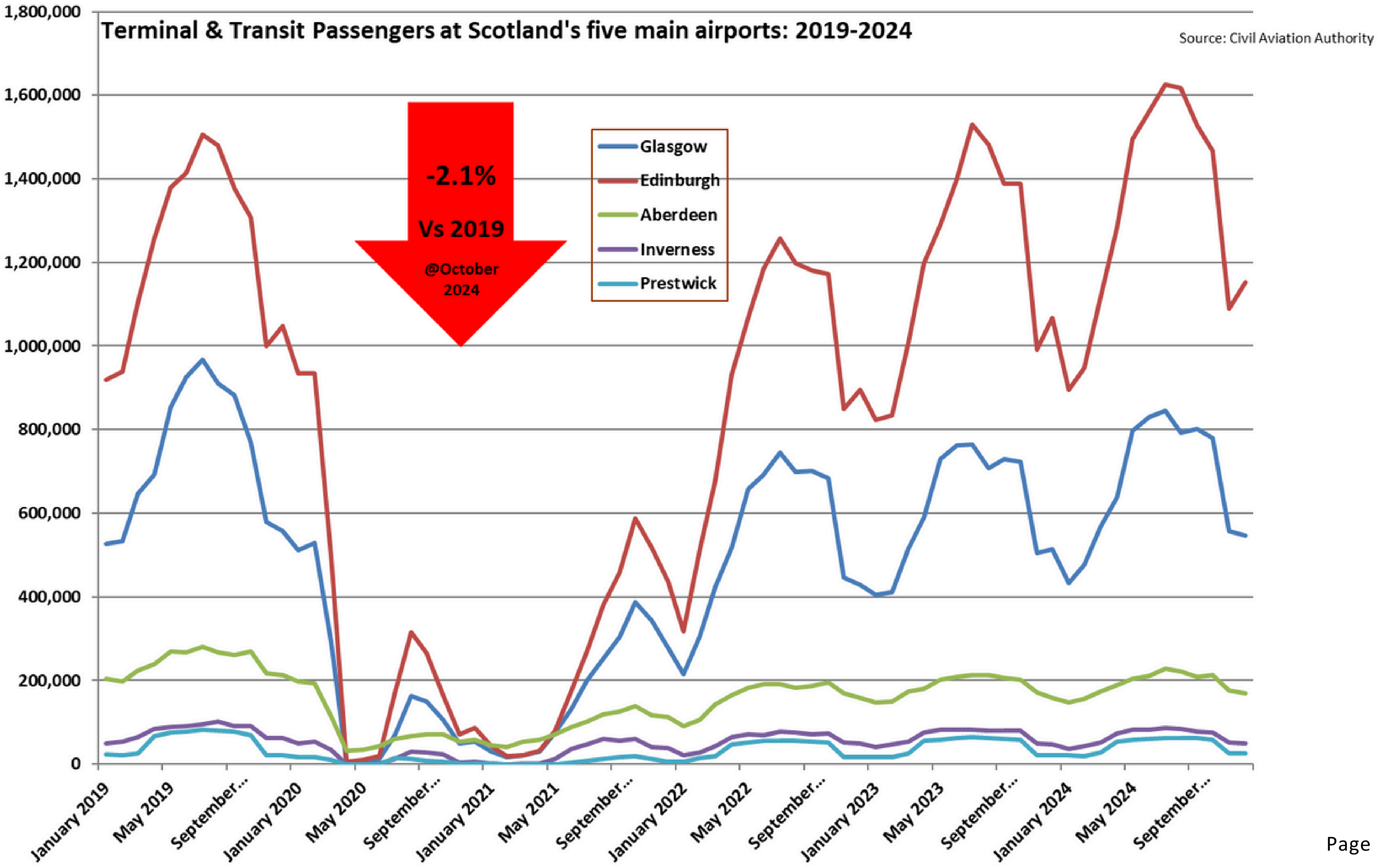
Source: Civil Aviation Authority

Terminal & Transit Passengers at Scotland's Five Main Airports



	January 2024	February 2024	March 2024	April 2024	May 2024	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

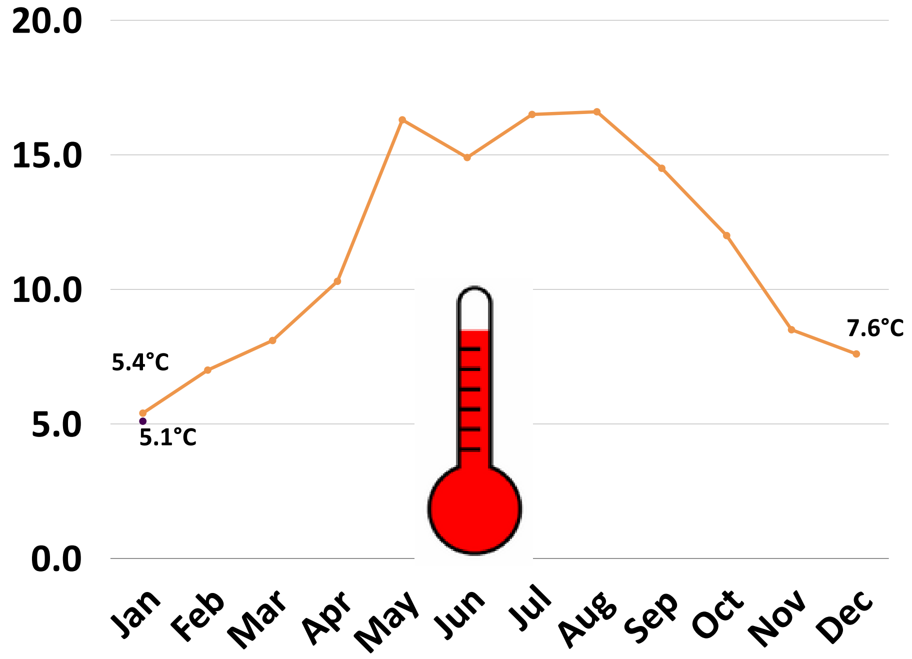
Top Five Scottish Airports



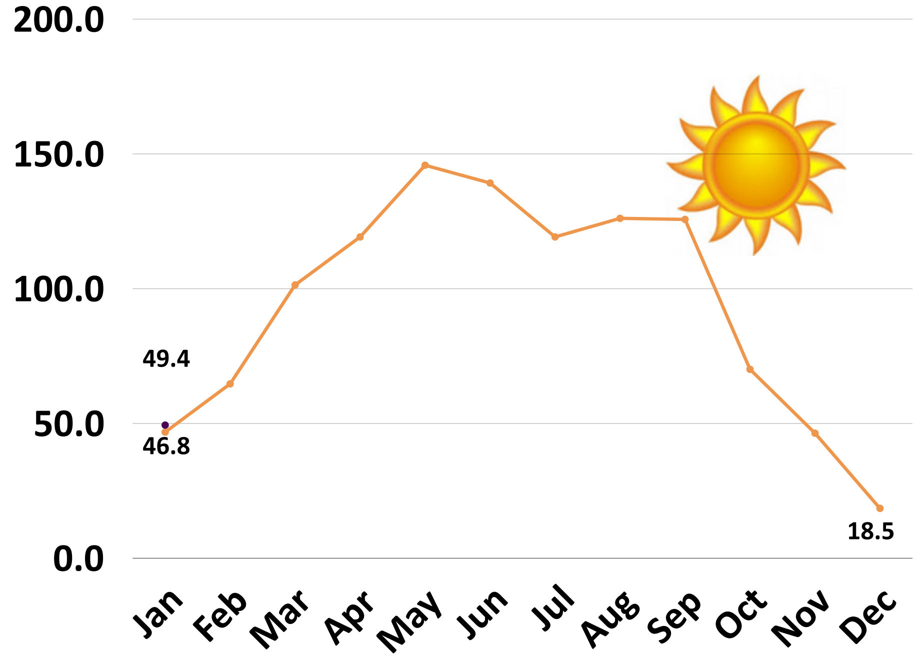
WEATHER: SCOTLAND - OVERVIEW

2025 2024

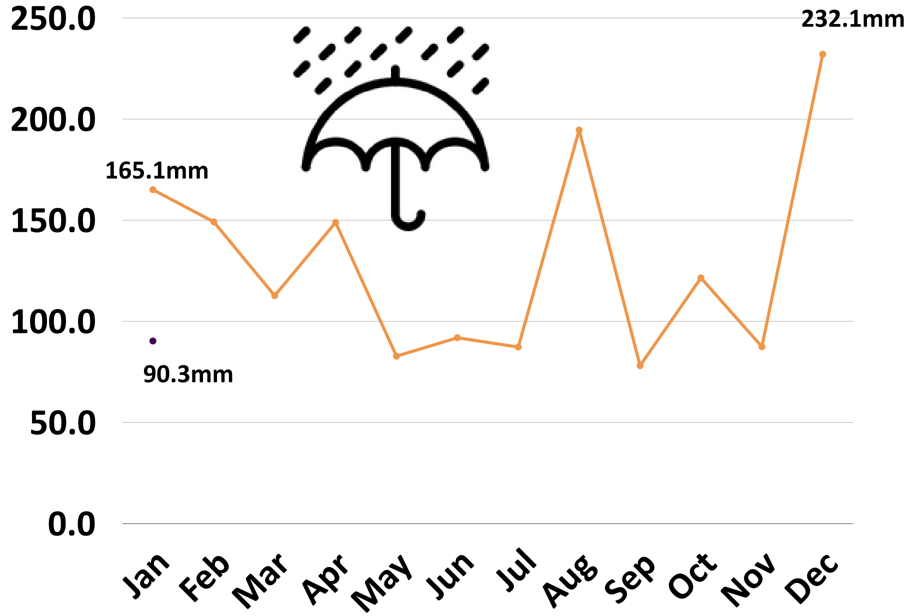
Average Temperature



Average Hours of Sunshine



Average Rainfall



Source: www.metoffice.gov.uk

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. 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.

Glasgow Caledonian University

University for the Common Good

Moffat Centre

https://ngagetechnology.net

www.moffatcentre.co.uk

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This report should be quoted as:

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