

SCOTTISH VISITOR ATTRACTION BAROMETER

MARCH 2025
EDITION
25/24

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SCOTLAND OVERVIEW

607

Comparable
Attractions

March 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 March 2025 and March 2024. Some 610 attraction operators provided figures for March 2025, with 607 attractions providing comparable visits figures. The total number of visits for the responding 607 barometer attractions in Scotland for March 2025 was 2,845,807. Compared to data from the previous year of 2,837,665 visits, this shows a visit increase of 0.3%.



0.3%

National visits compared to March 2024

2,845,807

Total Visits in March 2025



6.0%

National visits year to date vs. 2024

7,782,888

Total Visits in 2025 to date



EXECUTIVE SUMMARY

The March 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 0.3% increase in visitors in March 2025 compared to the same time in 2024.

Accessible Small Towns saw a significant increase in visits compared to March 2024, and the Perth & Kinross Local Authority area (reporting 3+ attractions) saw a 44.5% increase, compared to March 2024. Looking at specific sectors, the Outdoors/Nature Attractions (14.4%) and the Gardens (9.9%) categories recorded the most substantial visitor growth. Attractions in the Activity Attractions category showed a 19.7% decrease in visits compared to the same period in 2024.

Attractions within the Tay Cities (Scottish Regional Economic Partnership (SREP)) saw a 21.5% increase in visits, however, attractions within the Ayrshire SREP saw a 11.2% 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 March 2025 is 2.6%, down from 2.8% in February 2025. The CPI 12-month rate (%) for March 2025 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 2.4% down from 3.4% in February 2025. Inflation rates for restaurants and cafes were 3.0% down from 3.4% in February 2025.

Domestic consumer sentiment published by the GB National Tourist Boards covering March 2025 found that 17% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the February 2025 survey). The survey recorded 47% of respondents (a 1% increase on the February 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, 8% of UK adults intended to take a domestic overnight trip in March 2025 and 80% in the following 12 months. These figures show an increase with those who planned an overnight trip in the previous 12 months (76%). However, the three key barriers to taking an overnight UK trip in the next six months are the UK weather, rising cost of living, and personal finances. The figures as mentioned earlier have seen a slight shift from the rising costs of holidays/leisure to personal finances 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 March 2025 that UK air connectivity saw a -0% decrease when compared to the same period in 2024, also, UK air connectivity saw a 9% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for March 2025 global air passenger demand, measured by revenue per kilometer, was up 3.3% compared to March 2024. International demand rose 4.9% over the same period with domestic demand increasing 0.9%. The Asia Pacific region was the biggest global air passenger growth driver in March 2024 at 6.3% when compared to Europe at 4.4%.

Chris Greenwood
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Glasgow School for Business and Society
Glasgow Caledonian University



HIGHLIGHTS

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

The largest percentage decrease in visits recorded by former VisitScotland Regions for March 2025 was experienced by visitor attractions in the Shetland Islands Region.

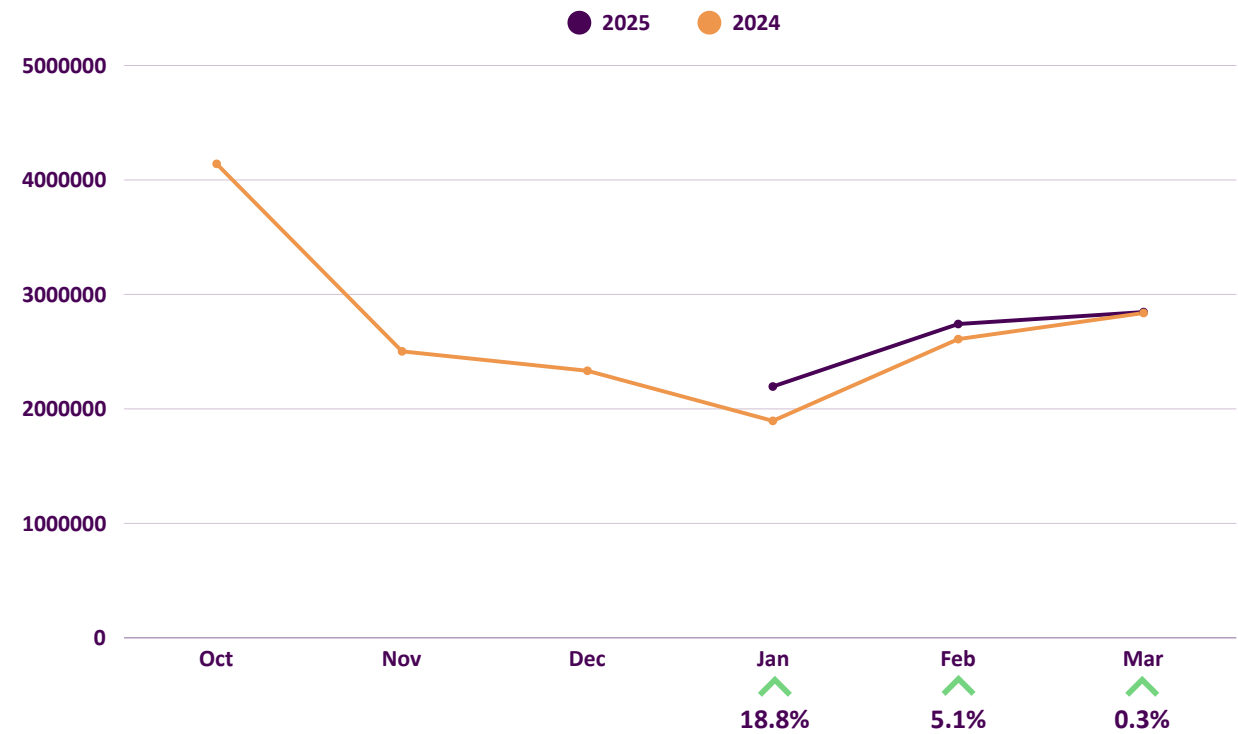
The most significant percentage increase in visits recorded in the SREP when comparing March 2025 with the same period in 2024 was experienced by visitor attractions in the Tay Cities Region.

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

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



Monthly Comparison



Attractions welcoming between 5,000 and 9,999 visits per year experienced the largest increase when comparing March 2025 with March 2024.

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

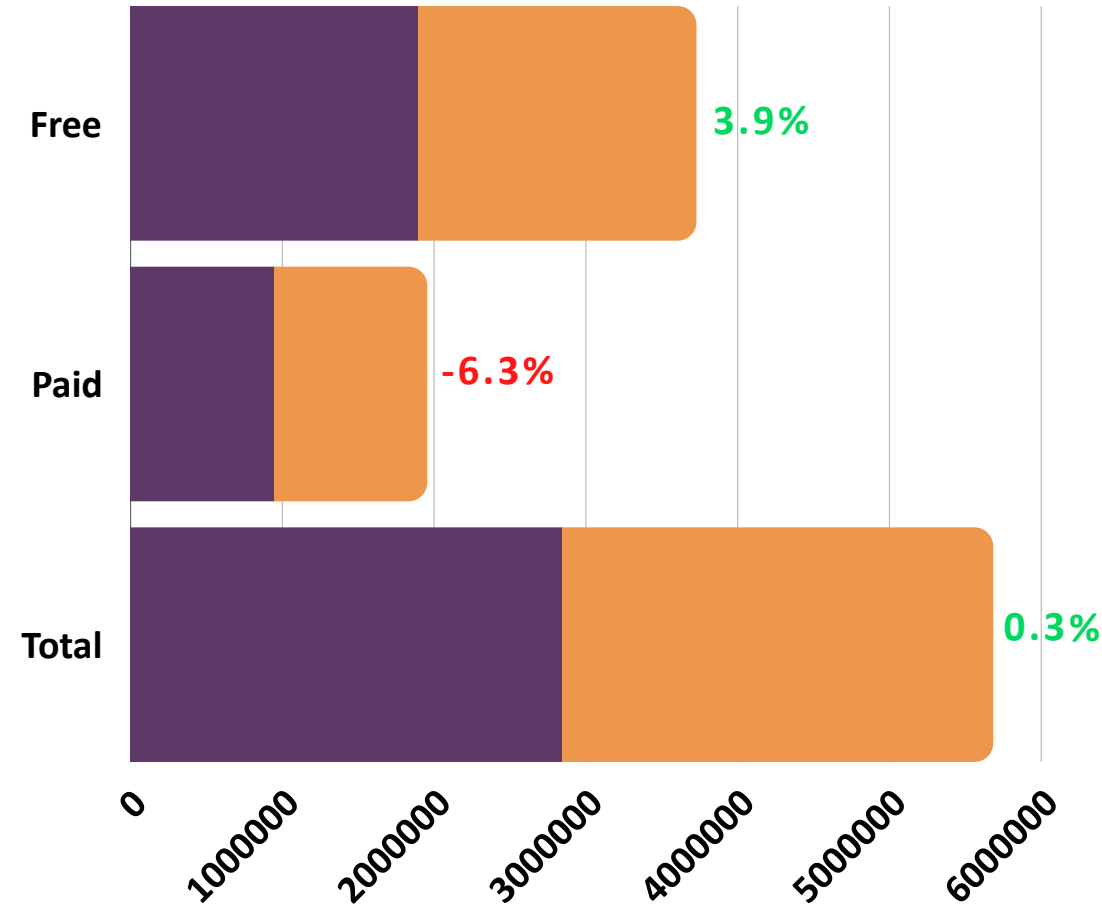
The most significant percentage increase in visits by Council Area (reporting 3+ attractions) was experienced by attractions in the Perth & Kinross Area, followed by the Eilean Siar Area. Visitor Attractions in the Shetland Islands Area experienced the most significant percentage decrease in visits when comparing March 2025 with March 2024.

ADMISSIONS

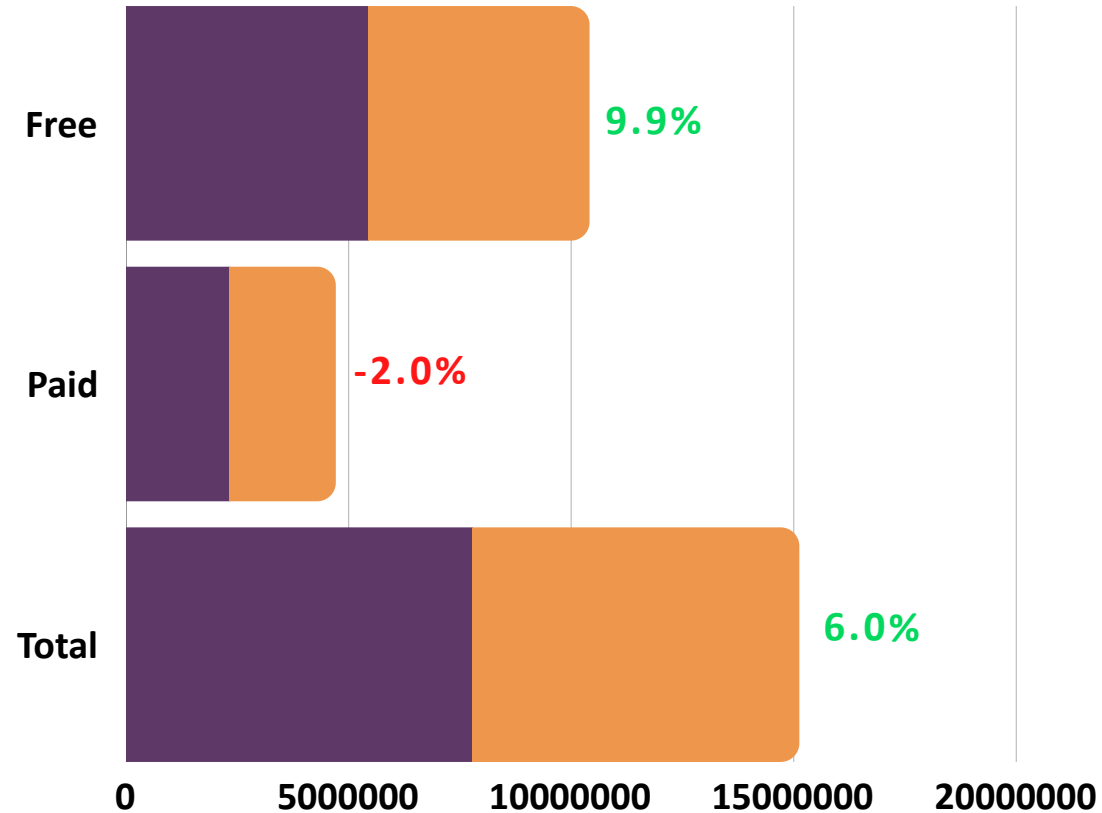
2025 2024

Policy Overview

March 2025 vs.
March 2024 Comparison



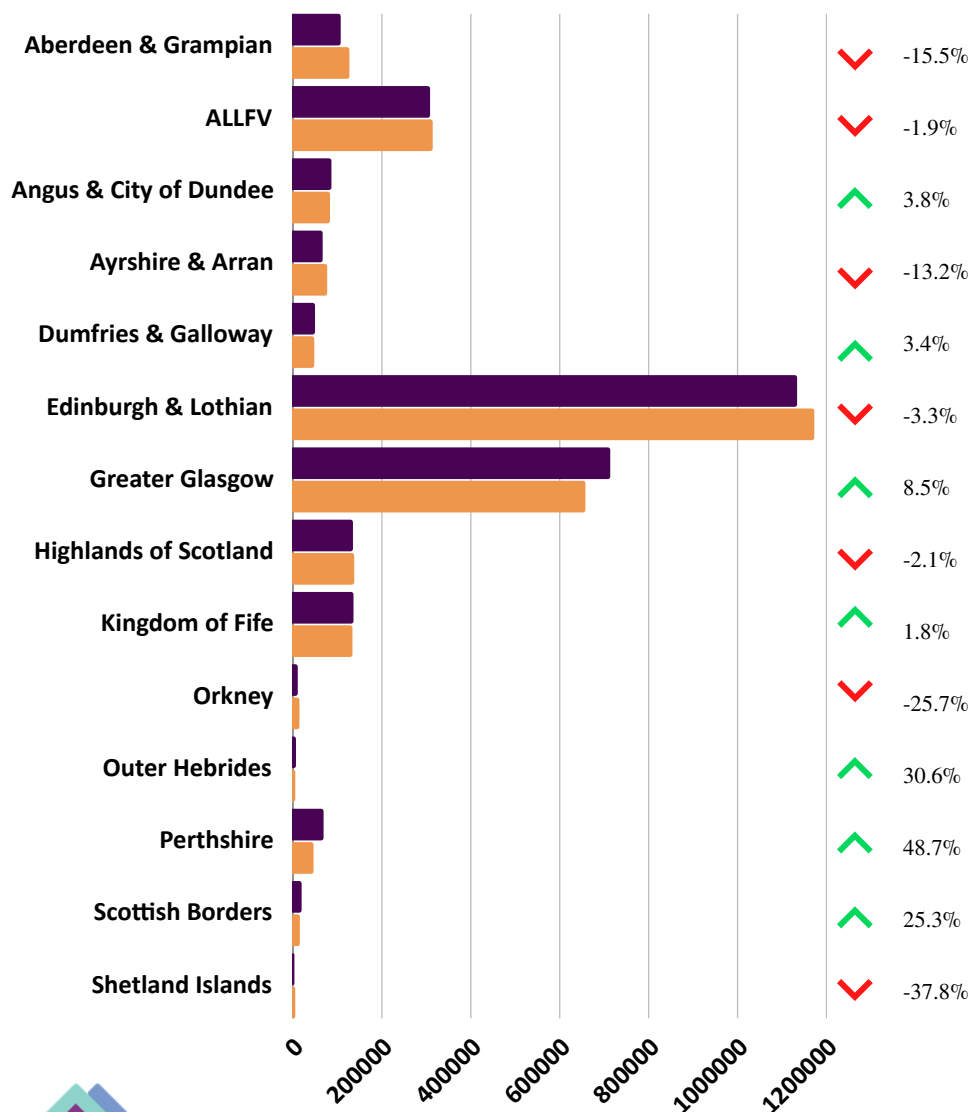
Year to Date 25 vs. 24 Comparison



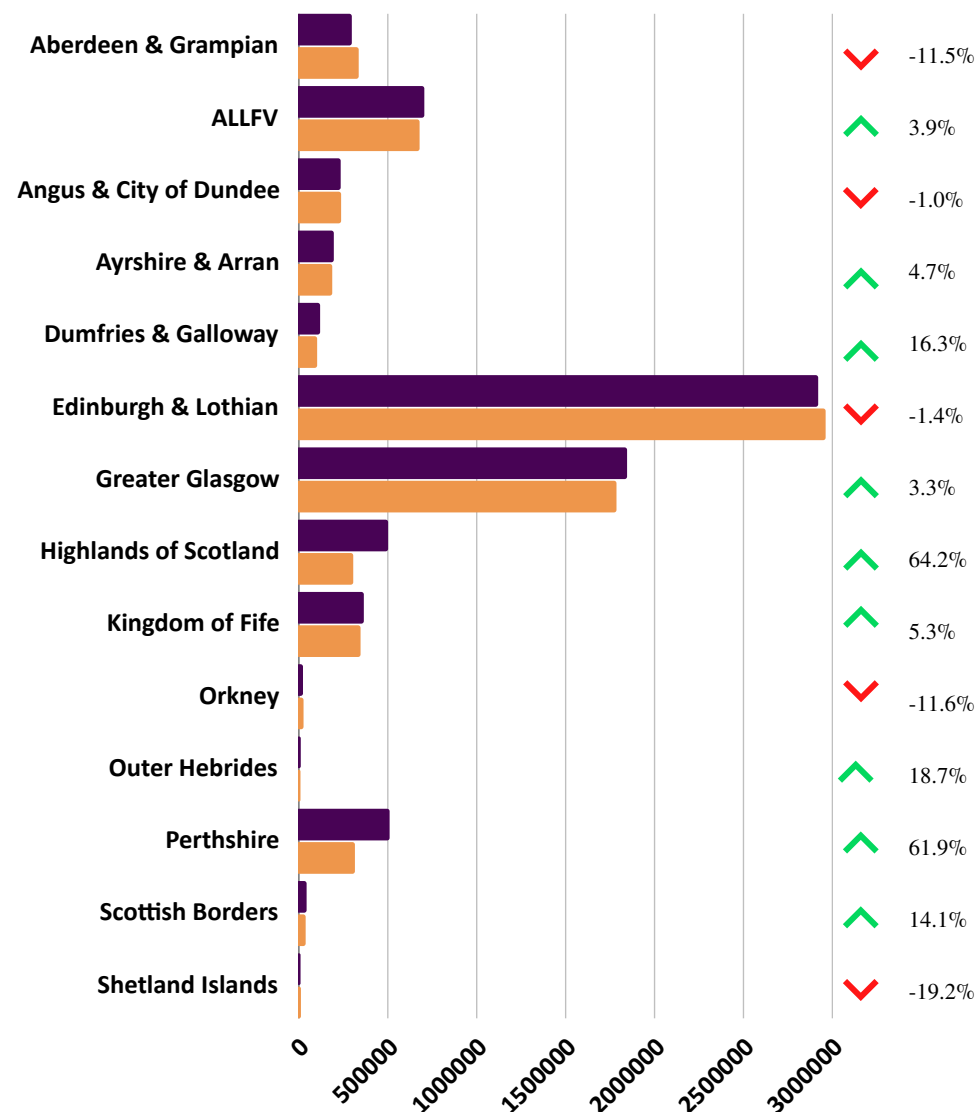
PERFORMANCE

By Former Visit Scotland Area

2025 March (vs. 2024)



2025 Year to Date (vs. 2024)

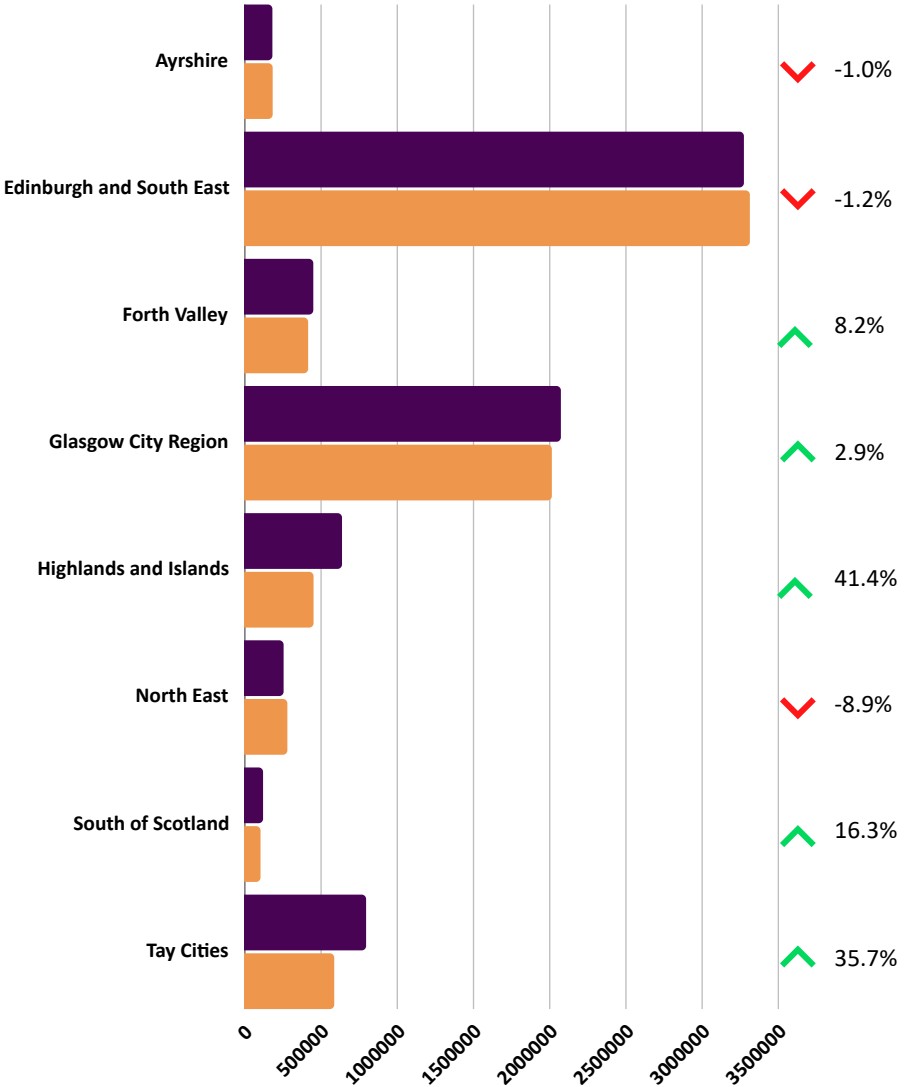
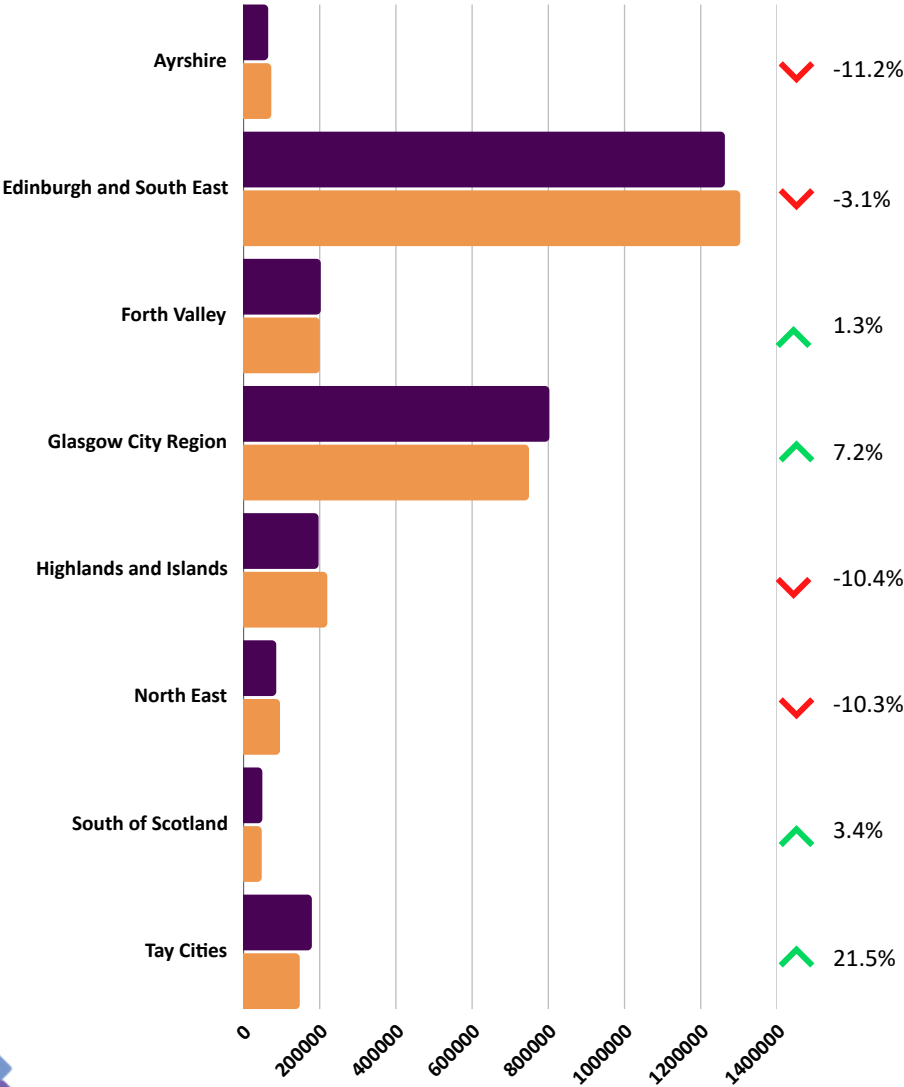


PERFORMANCE

By Regional Economic Partnerships

2025 March (vs. 2024)

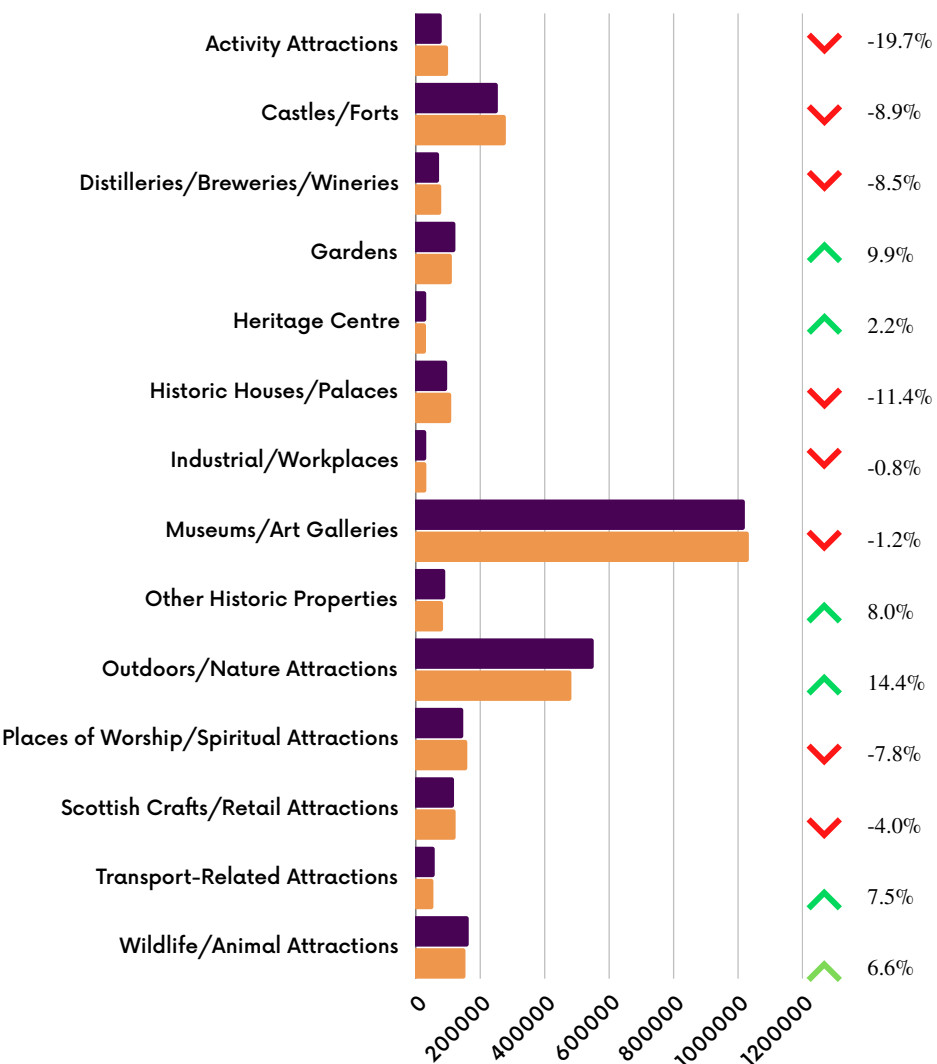
2025 Year to Date (vs. 2024)



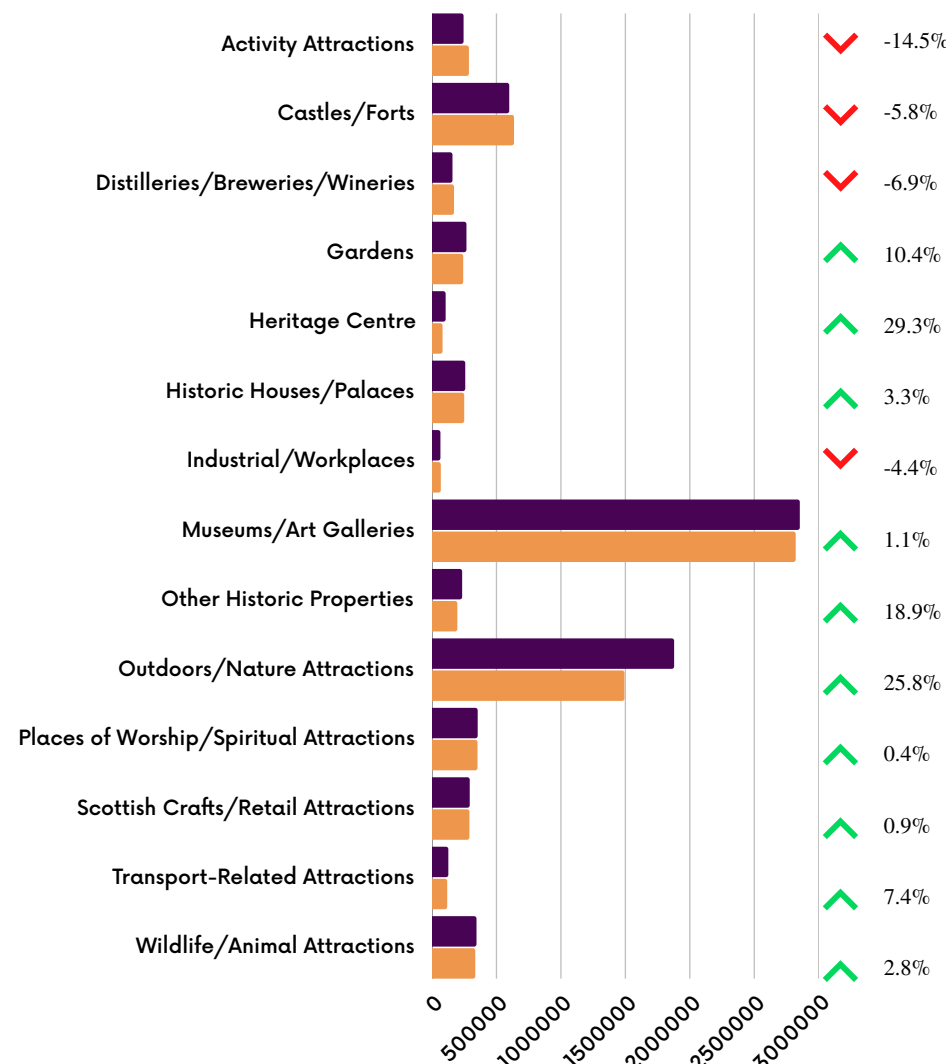
PERFORMANCE

By Attraction Category

2025 March (vs. 2024)



2025 Year to Date (vs. 2024)



PERFORMANCE

By Location Accessibility & Density

2025 March (vs. 2024)

-1%

Accessible Rural

10%

Accessible Small Towns

-1%

Large Urban Areas

5%

Other Urban Areas

-2%

Remote Rural

-20%

Remote Small Towns

2025 Year to Date (vs. 2024)

-3%

Accessible Rural

44%

Accessible Small Towns

0%

Large Urban Areas

9%

Other Urban Areas

26%

Remote Rural

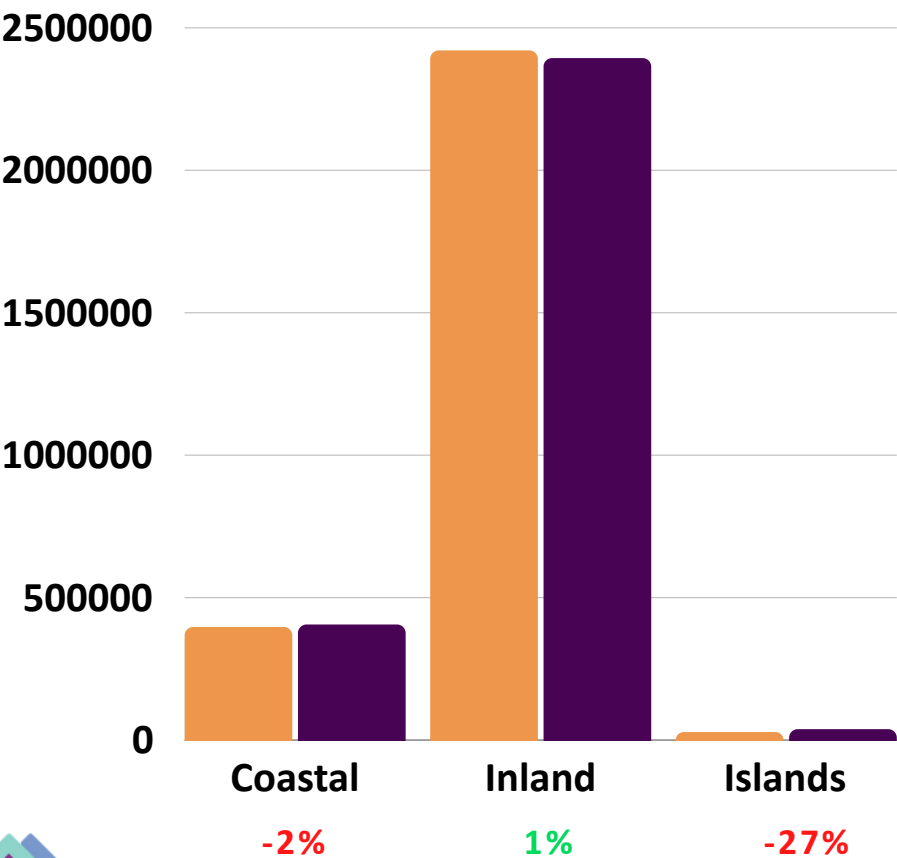
-6%

Remote Small Towns

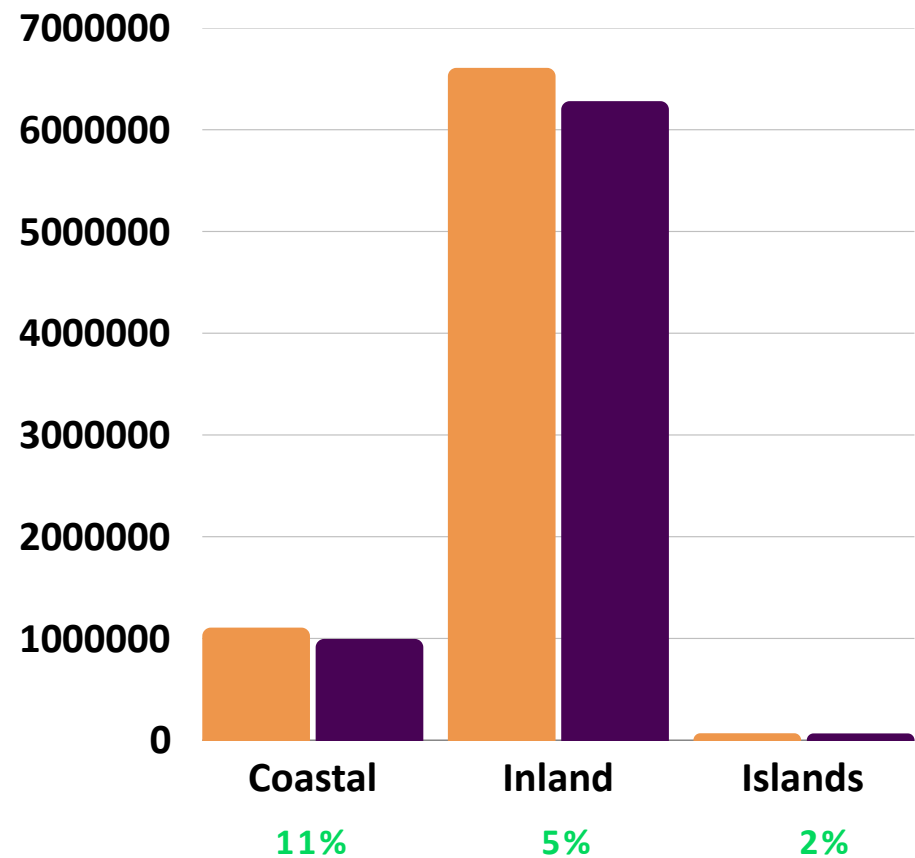
PERFORMANCE

By Geographic Location

2025 March (vs. 2024)



2025 Year to Date (vs. 2024)



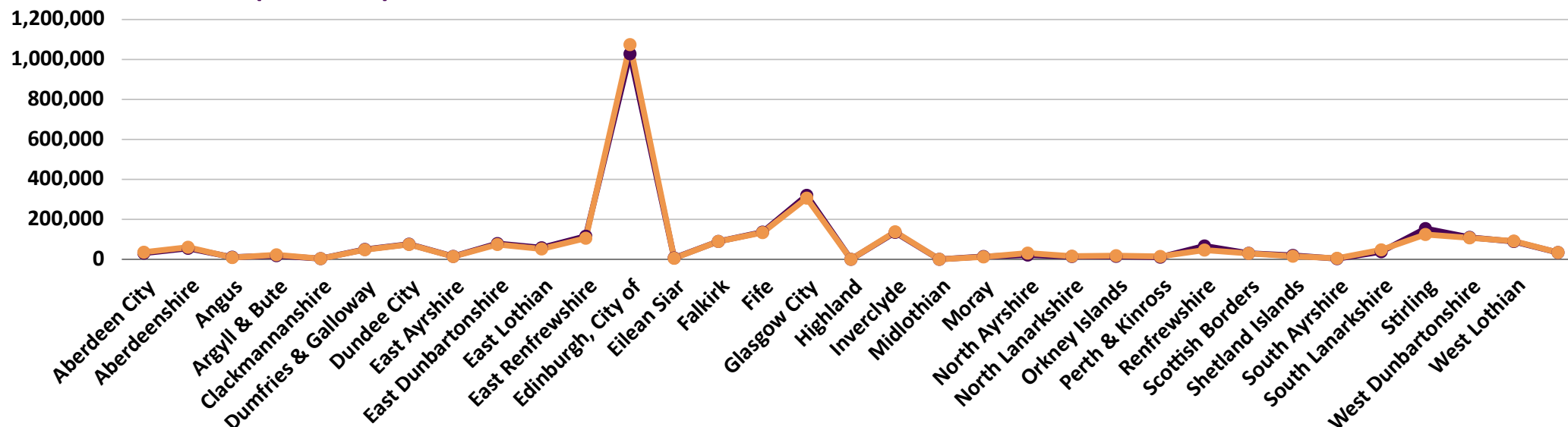
PERFORMANCE

2025

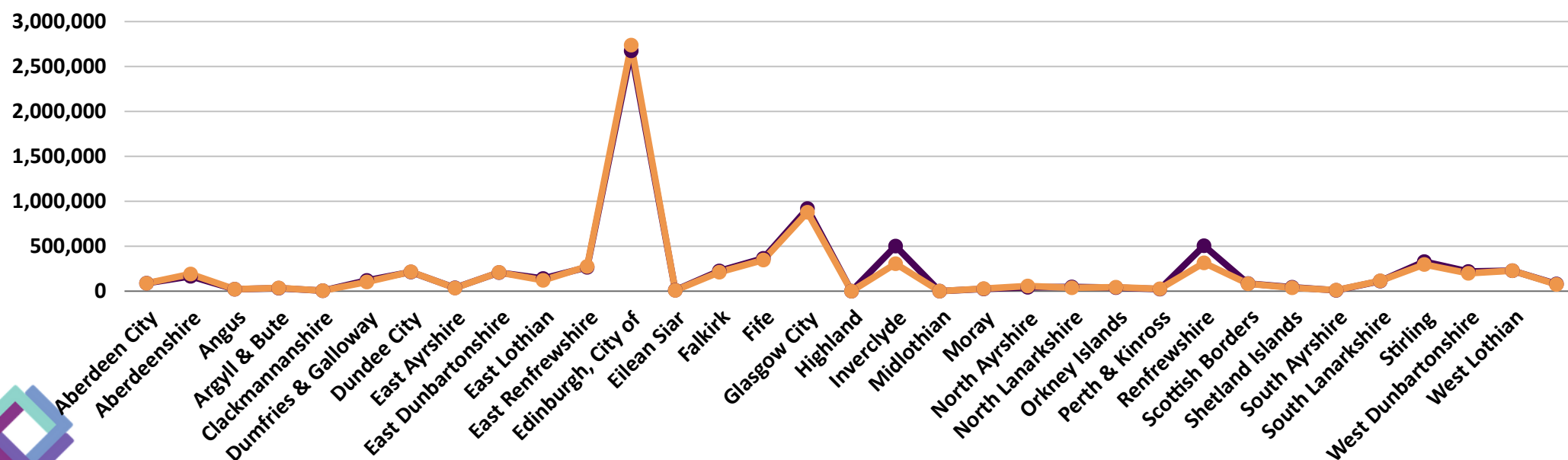
2024

By Council Area

2025 March (vs. 2024)



2024 Year to Date (vs. 2023)



PERFORMANCE

By Visit Scotland Area

2025 March (vs. 2024)

Admission By Region				
Region	No of Attractions	2025	2024	% Change
Aberdeen & Grampian	79	107331	126945	-15.5%
ALLFV	80	308366	314219	-1.9%
Angus & City of Dundee	31	86465	83287	3.8%
Ayrshire & Arran	24	66754	76933	-13.2%
Dumfries & Galloway	41	49502	47872	3.4%
Edinburgh & Lothian	88	1133933	1172661	-3.3%
Greater Glasgow	59	713618	657797	8.5%
Highlands of Scotland	62	134871	137748	-2.1%
Kingdom of Fife	35	136105	133712	1.8%
Orkney	21	10737	14446	-25.7%
Outer Hebrides	14	6730	5154	30.6%
Perthshire	26	68792	46260	48.7%
Scottish Borders	29	19407	15493	25.3%
Shetland Islands	18	3196	5138	-37.8%

Year to Date 2025/2024

Ytd Admission By Region				
Region	No of Attractions	2025	2024	% Change
Aberdeen & Grampian	79	297638	336354	-11.5%
ALLFV	80	705388	678760	3.9%
Angus & City of Dundee	31	235025	237464	-1.0%
Ayrshire & Arran	24	196387	187565	4.7%
Dumfries & Galloway	41	119398	102661	16.3%
Edinburgh & Lothian	88	2920170	2962006	-1.4%
Greater Glasgow	59	1845518	1785940	3.3%
Highlands of Scotland	62	501714	305624	64.2%
Kingdom of Fife	35	365149	346747	5.3%
Orkney	21	23096	26136	-11.6%
Outer Hebrides	14	10576	8912	18.7%
Perthshire	26	510128	315067	61.9%
Scottish Borders	29	43397	38036	14.1%
Shetland Islands	18	9304	11515	-19.2%

By Regional Economic Partnerships

2025 March (vs. 2024)

Admission By Sgrop				
SGREP	No of Attractions	2025	2024	% Change
Ayrshire	20	64850	73042	-11.2%
Edinburgh and South East	133	1263307	1303723	-3.1%
Forth Valley	34	202855	200303	1.3%
Glasgow City Region	66	802764	749188	7.2%
Highlands and Islands	184	197085	219936	-10.4%
North East	54	85999	95911	-10.3%
South of Scotland	41	49502	47872	3.4%
Tay Cities	75	179445	147690	21.5%

Year to Date 2025/2024

Admission By Sgrop				
SGREP	No of Attractions	2025	2024	% Change
Ayrshire	20	180598	182355	-1.0%
Edinburgh and South East	133	3273974	3313036	-1.2%
Forth Valley	34	448978	415121	8.2%
Glasgow City Region	66	2073180	2013892	2.9%
Highlands and Islands	184	637279	450613	41.4%
North East	54	254113	278825	-8.9%
South of Scotland	41	119398	102661	16.3%
Tay Cities	75	795368	586284	35.7%

PERFORMANCE

By Attraction Category

2025 March (vs. 2024)

Admission By Category				
Category	No of Attractions	2025	2024	% Change
Activity Attractions	12	80459	100197	-19.7%
Castles/Forts	57	254581	279424	-8.9%
Distilleries/Breweries/Wineries	52	72222	78962	-8.5%
Gardens	25	122918	111898	9.9%
Heritage Centre	25	32324	31620	2.2%
Historic Houses/Palaces	46	97384	109910	-11.4%
Industrial/Workplaces	9	32433	32690	-0.8%
Museums/Art Galleries	229	1021151	1033510	-1.2%
Other Historic Properties	56	91342	84545	8.0%
Outdoors/Nature Attractions	41	552126	482839	14.4%
Places of Worship/Spiritual Attractions	14	147297	159827	-7.8%
Scottish Crafts/Retail Attractions	7	118608	123560	-4.0%
Transport-Related Attractions	12	58740	54628	7.5%
Wildlife/Animal Attractions	22	164222	154055	6.6%

Year to Date 2025/2024

Ytd Admission By Category				
Category	No of Attractions	2025	2024	% Change
Activity Attractions	12	244749	286274	-14.5%
Castles/Forts	57	599215	636400	-5.8%
Distilleries/Breweries/Wineries	52	158787	170628	-6.9%
Gardens	25	267134	241881	10.4%
Heritage Centre	25	105725	81752	29.3%
Historic Houses/Palaces	46	257900	249785	3.3%
Industrial/Workplaces	9	65291	68267	-4.4%
Museums/Art Galleries	229	2853272	2821498	1.1%
Other Historic Properties	56	233782	196615	18.9%
Outdoors/Nature Attractions	41	1878339	1493025	25.8%
Places of Worship/Spiritual Attractions	14	354302	352815	0.4%
Scottish Crafts/Retail Attractions	7	292607	290128	0.9%
Transport-Related Attractions	12	126689	117987	7.4%
Wildlife/Animal Attractions	22	345096	335732	2.8%

By Admission Charges

2025 March (vs. 2024)

Admission By Admission				
Admission	No of Attractions	2025	2024	% Change
Free	260	1900360	1828266	3.9%
Paid	347	945447	1009399	-6.3%
Total	607	2845807	2837665	0.3%

Year to Date 2025/2024

Ytd Admission By Admission Type				
Admission	No of Attractions	2025	2024	% Change
Free	260	5450882	4962129	9.9%
Paid	347	2332006	2380658	-2.0%
Total	607	7782888	7342787	6.0%

PERFORMANCE

By Volume of Visits

2025 March (vs. 2024)

Admission By Volume Visits				
Volume Visits	No of Attractions	2025	2024	% Change
0 - 4,999	200	9287	10948	-15.2%
5,000 - 9,999	62	21423	19668	8.9%
10,000 - 19,999	85	50243	54412	-7.7%
20,000 - 49,999	103	163748	173863	-5.8%
50,000 - 99,999	61	208395	214890	-3.0%
100,000 +	96	2392711	2363884	1.2%

Year to Date 2025/2024

Admission By Volume Visits				
Volume Visits	No of Attractions	2025	2024	% Change
0 - 4,999	200	20891	20288	3.0%
5,000 - 9,999	62	54045	43575	24.0%
10,000 - 19,999	85	117383	106252	10.5%
20,000 - 49,999	103	506563	420750	20.4%
50,000 - 99,999	61	524680	518424	1.2%
100,000 +	96	6559326	6233498	5.2%

By Location/Density

2025 March(vs. 2024)

Admission By Urban Rural				
Urban/Rural	No of Attractions	2025	2024	% Change
Accessible Rural	121	315791	320238	-1.4%
Accessible Small Towns	41	136418	124581	9.5%
Large Urban Areas	117	1604899	1616839	-0.7%
Other Urban Areas	102	544020	516377	5.4%
Remote Rural	187	204675	209789	-2.4%
Remote Small Towns	39	40004	49841	-19.7%

Year to Date 2025/2024

Ytd Admission By Urban Rural				
Urban/Rural	No of Attractions	2025	2024	% Change
Accessible Rural	121	699994	719312	-2.7%
Accessible Small Towns	41	707653	492352	43.7%
Large Urban Areas	117	4264141	4256639	0.2%
Other Urban Areas	102	1339692	1234913	8.5%
Remote Rural	187	671374	532989	26.0%
Remote Small Towns	39	100034	106582	-6.1%

By Geographic Area

2025 March (vs. 2024)

Admission By Location				
Location	No of Attractions	2025	2024	% Change
Coastal	157	396943	405599	-2.1%
Inland	368	2420833	2393862	1.1%
Islands	82	28031	38204	-26.6%

Year to Date 2025/2024

Ytd Admission By Location				
Location	No of Attractions	2025	2024	% Change
Coastal	157	1106575	995255	11.2%
Inland	368	6608191	6281031	5.2%
Islands	82	68122	66501	2.4%

PERFORMANCE

By Council Area

2024 March (vs. 2023)

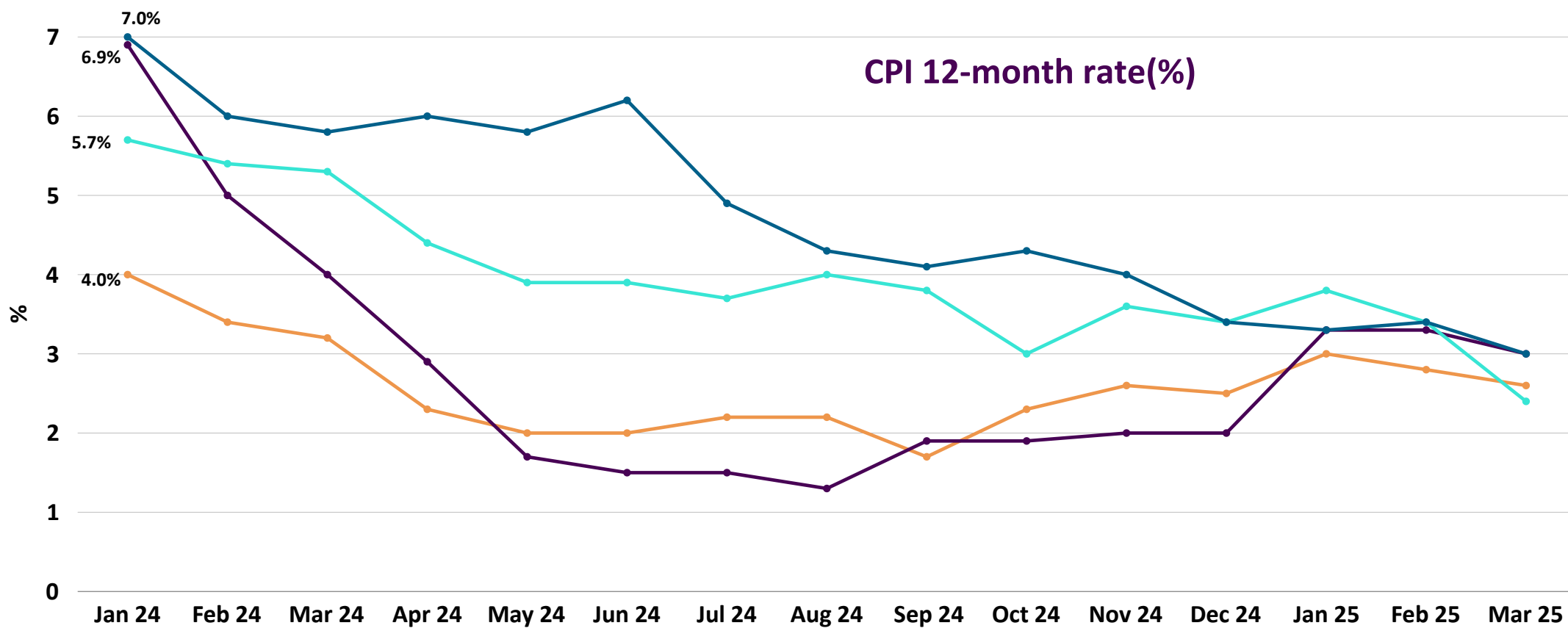
Admission By Council				
Council	No of Attractions	2025	2024	% Change
Aberdeen City	11	30891	35486	-13.0%
Aberdeenshire	43	55108	60425	-8.8%
Angus	18	10698	8876	20.5%
Argyll & Bute	40	18315	22525	-18.7%
Clackmannanshire	4	3486	3415	2.1%
Dumfries & Galloway	41	49502	47872	3.4%
Dundee City	12	75767	74398	1.8%
East Ayrshire	7	14626	13845	5.6%
East Dunbartonshire	3	78849	74184	6.3%
East Lothian	20	57716	51911	11.2%
East Renfrewshire	3	115578	105528	9.5%
Edinburgh, City of	54	1028229	1074410	-4.3%
Eilean Siar	14	6730	5154	30.6%
Falkirk	10	89548	89483	0.1%
Fife	35	136105	133712	1.8%
Glasgow City	26	320142	306137	4.6%
Greater Glasgow	1	0	0	0.0%
Highland	62	134871	137748	-2.1%
Inverclyde	2	40	104	-61.5%
Midlothian	4	14009	12113	15.7%
Moray	25	21332	31034	-31.3%
North Ayrshire	8	14043	15750	-10.8%
North Lanarkshire	4	14933	18143	-17.7%
Orkney Islands	21	10737	14446	-25.7%
Perth & Kinross	26	66842	46273	44.5%
Renfrewshire	9	30205	29485	2.4%
Scottish Borders	29	19407	15493	25.3%
Shetland Islands	18	3196	5138	-37.8%
South Ayrshire	9	38085	47338	-19.6%
South Lanarkshire	11	153871	124216	23.9%
Stirling	20	109821	107405	2.3%
West Dunbartonshire	7	89146	91391	-2.5%
West Lothian	10	33979	34227	-0.7%

2024 Year to Date (vs. 2023)

Admission By Council				
Council	No of Attractions	2025	2024	% Change
Aberdeen City	11	88584	87863	0.8%
Aberdeenshire	43	165529	190962	-13.3%
Angus	18	21624	21720	-0.4%
Argyll & Bute	40	33275	35687	-6.8%
Clackmannanshire	4	5285	5309	-0.5%
Dumfries & Galloway	41	119398	102661	16.3%
Dundee City	12	213401	215731	-1.1%
East Ayrshire	7	37203	34711	7.2%
East Dunbartonshire	3	207062	208760	-0.8%
East Lothian	20	140552	120746	16.4%
East Renfrewshire	3	265768	275184	-3.4%
Edinburgh, City of	54	2674704	2738204	-2.3%
Eilean Siar	14	10576	8912	18.7%
Falkirk	10	224915	211097	6.6%
Fife	35	365149	346747	5.3%
Glasgow City	26	919209	877991	4.7%
Greater Glasgow	1	0	0	0.0%
Highland	62	501714	305624	64.2%
Inverclyde	2	289	253	14.2%
Midlothian	4	24830	28175	-11.9%
Moray	25	43525	57529	-24.3%
North Ayrshire	8	46711	38001	22.9%
North Lanarkshire	4	39681	44004	-9.8%
Orkney Islands	21	23096	26136	-11.6%
Perth & Kinross	26	505601	315080	60.5%
Renfrewshire	9	84725	82621	2.6%
Scottish Borders	29	43397	38036	14.1%
Shetland Islands	18	9304	11515	-19.2%
South Ayrshire	9	112473	114853	-2.1%
South Lanarkshire	11	328784	297127	10.7%
Stirling	20	218778	198715	10.1%
West Dunbartonshire	7	227662	227952	-0.1%
West Lothian	10	80084	74881	7.0%

CONSUMER PRICE INFLATION - OVERVIEW

CPI January 2024 - March 2025



CURRENCY - OVERVIEW

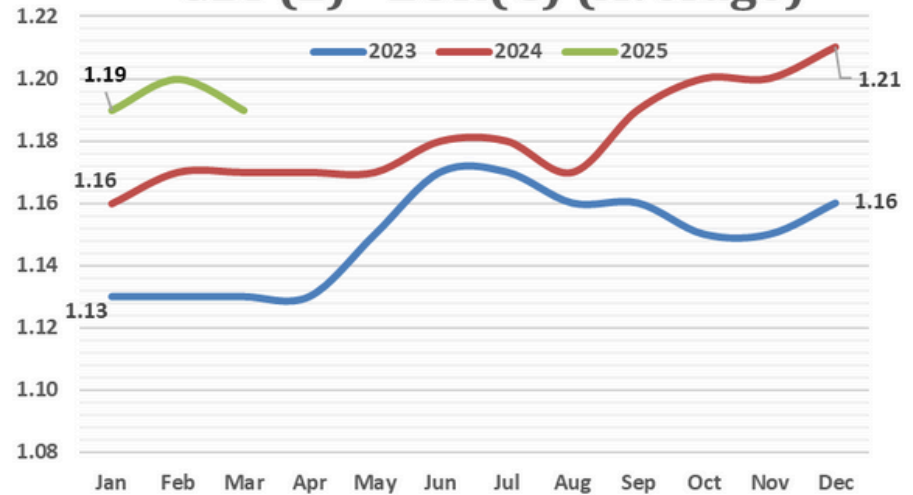
Currency Trends



£ GBP to € EUR

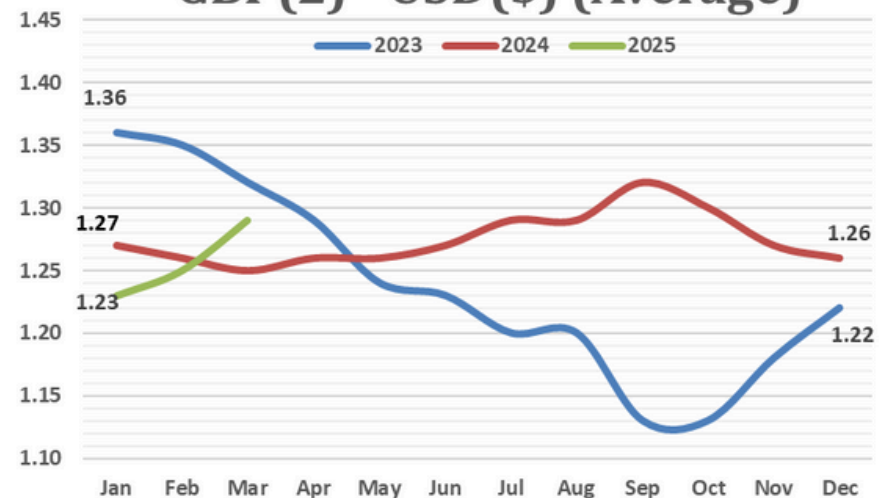
£ GBP to € EUR - 3 Year Average

GBP (£) - EUR (€) (Average)



£ GBP to \$ USD - 3 Year Average

GBP (£) - USD (\$) (Average)

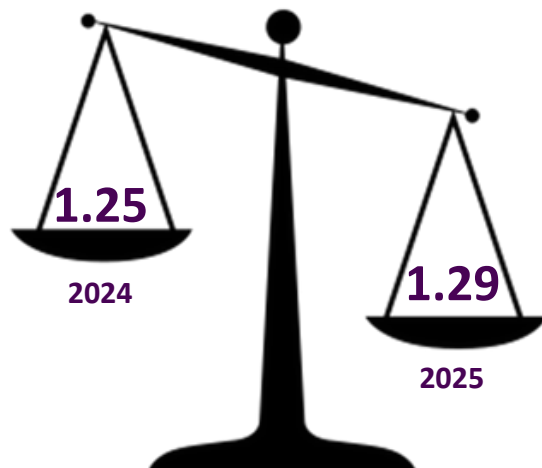


March
2025 vs. 2024



£ GBP to \$ USD

March
2025 vs. 2024



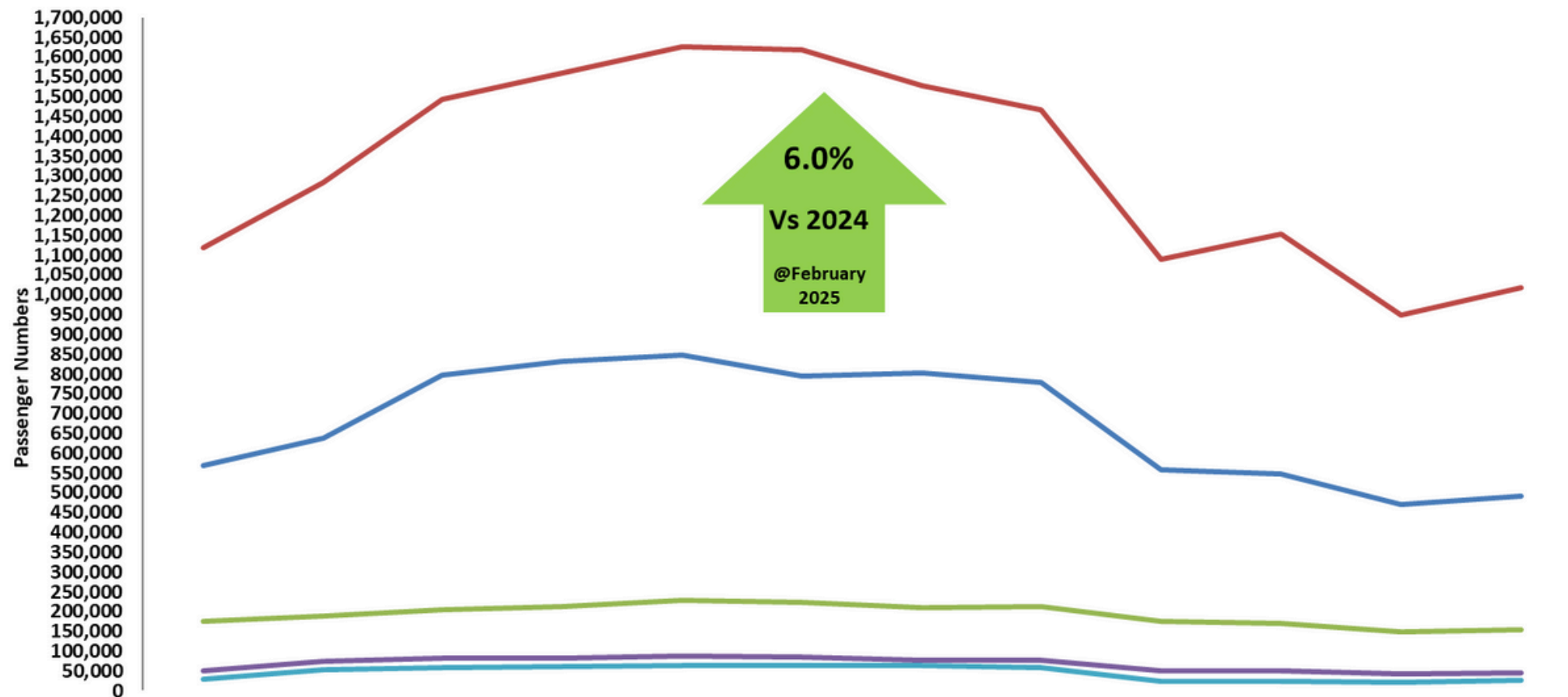
AIRPORT PASSENGER - OVERVIEW



Top Five Scottish Airports

Terminal & Transit Passengers at Scotland's Five Main Airports

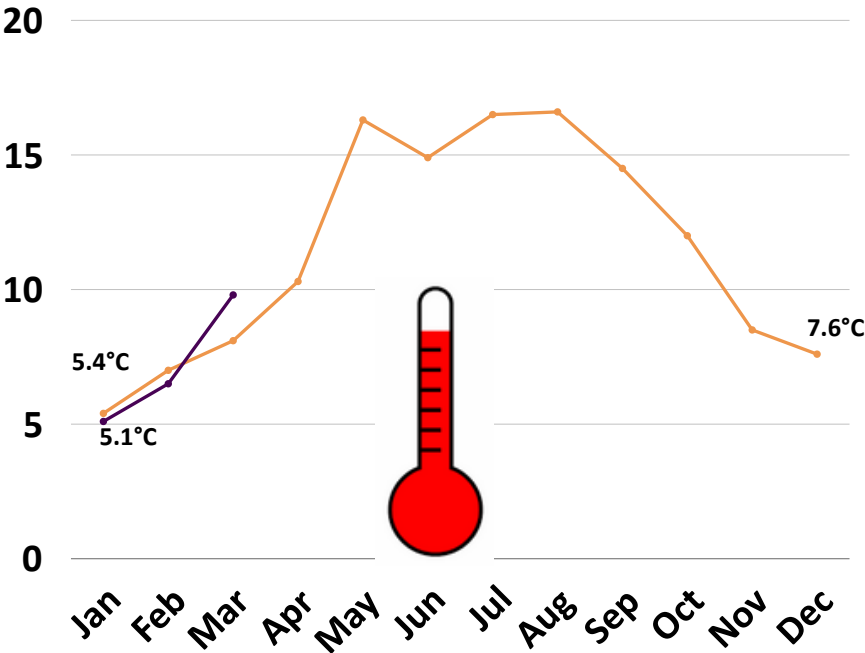
Source: Civil Aviation Authority



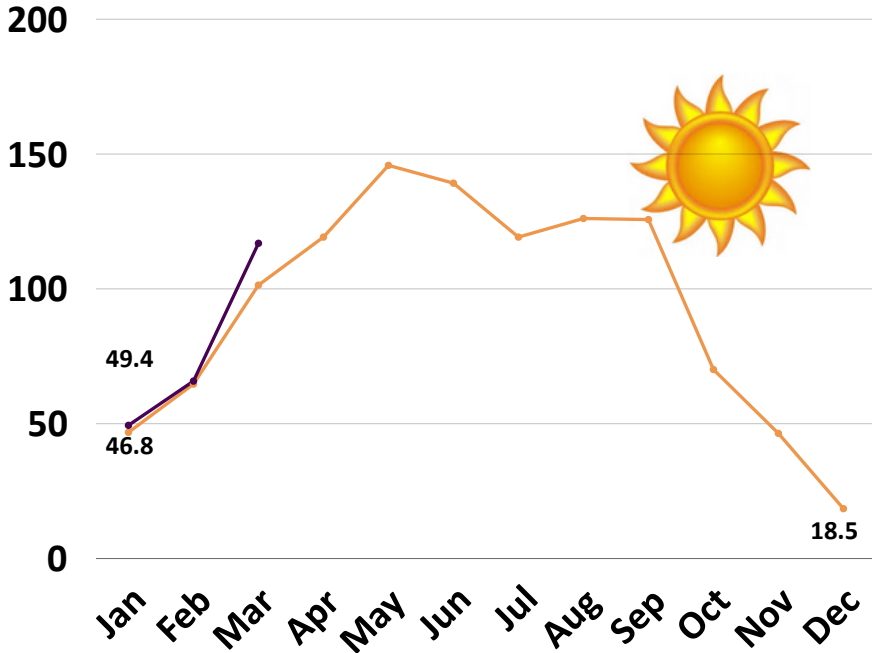
	March 2024	April 2024	May 2024	June 2024	July 2024	August 2024	September 2024	October 2024	November 2024	December 2024	January 2025	February 2025
Glasgow	568,517	637,960	796,343	830,479	846,250	793,832	801,653	779,305	558,251	546,225	469,823	491,097
Edinburgh	1,118,057	1,283,382	1,494,105	1,560,119	1,626,726	1,617,538	1,528,637	1,465,440	1,090,264	1,153,317	949,376	1,016,219
Aberdeen	174,666	189,148	203,708	211,464	229,349	222,672	208,600	212,638	175,310	169,354	149,243	154,494
Inverness	51,219	74,380	81,413	81,332	87,429	84,020	77,981	76,333	51,154	50,565	42,151	45,881
Prestwick	28,114	53,446	57,358	60,185	63,619	63,116	62,389	58,731	24,649	24,951	21,665	25,267

WEATHER: SCOTLAND - OVERVIEW

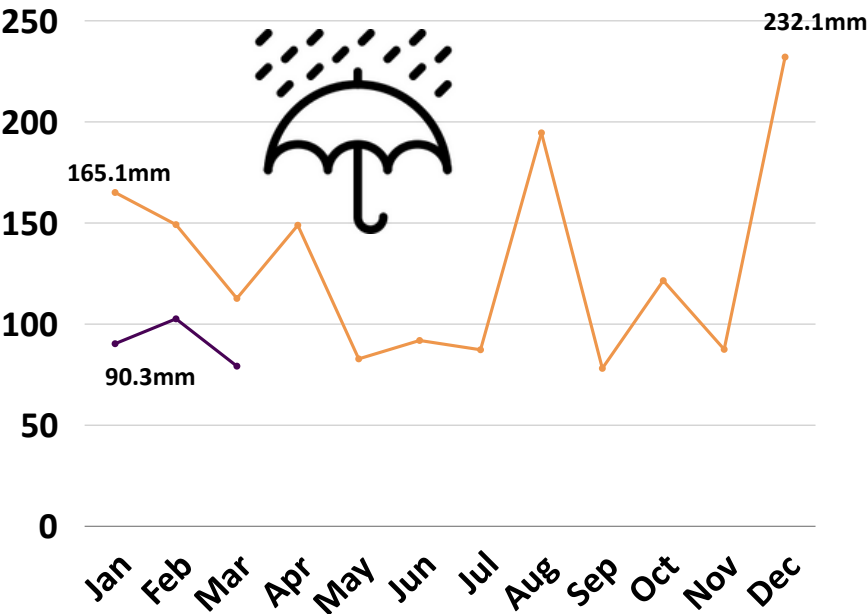
Average Temperature



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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This report should be quoted as:

Moffat Centre (2025): Scottish Visitor Attraction Barometer Report: March 2025/2024, Glasgow School for Business and Society, Glasgow Caledonian University: Glasgow, UK.

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