

SCOTTISH VISITOR ATTRACTION BAROMETER

JULY 2024 EDITION

24/23

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SCOTLAND OVERVIEW

582
Comparable
Attractions

July 2024/2023

Welcome to the Moffat Centre Scottish Visitor Attraction Barometer. The Barometer continues to review visitor attraction performance throughout Scotland, highlighting trends across various industry sectors and categories as attraction operators requested.

This Barometer compares the period of July 2024 and July 2023. Some 590 attraction operators provided figures for July 2024 with 582 attractions providing comparable visits figures. The total number of visits for the responding 582 barometer attractions in Scotland for July 2024 was 6,508,811. Compared to data from the previous year of 6,414,630 visits, this shows a visit increase of 1.5%.



National visits compared to July 2023

6,508,811

Total Visits in July 2024



National visits year to date vs. 2023

29,826,785

Total Visits in 2024 to date



EXECUTIVE SUMMARY

The July 2024 Scottish Visitor Attraction Barometer continued to show growth in visitor numbers to attractions in Scotland compared to the same period in 2023. Scotland's visitor attractions saw a 1.5% increase in visitors in July 2024 compared to the same time in 2023.

Accessible Small Towns saw a significant increase in visits compared to July 2023, and the Clackmannanshire Local Authority area (reporting 3+ attractions) saw a 49.7% increase, compared to July 2023. Looking at specific sectors, the Historic Houses/Palaces (19.0%) and Places of Worship/Spiritual Attractions (17.2%) attraction categories continued to record the most substantial visitor growth. Attractions in the Heritage Centre category showed a 14.2% decrease in visits compared to the same period in 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to July 2024 is 2.2%. The inflation rate for July 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.7%. Inflation rates for restaurants and cafes were 4.9% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -1.2% in July, however, compared to the 4.6% increase in July 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of July 2023, when they had increased by 9.1%.

Domestic consumer sentiment provided by the GB National Tourist Boards for July 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 2% decrease on the June 2024 survey). The survey recorded 47% of respondents (a 3% increase on the June 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".



EXECUTIVE SUMMARY

Despite consumer concern about the state of the economy, 51% of UK adults intended to take a domestic overnight trip in the third quarter of 2024 and 77% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (75%). However, the three key barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather, and personal finances. The figures as mentioned earlier have been consistent across the last six waves of the GB National Tourist Survey (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation grew in July 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 2% increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.

Chris Greenwood

Senior Research Fellow

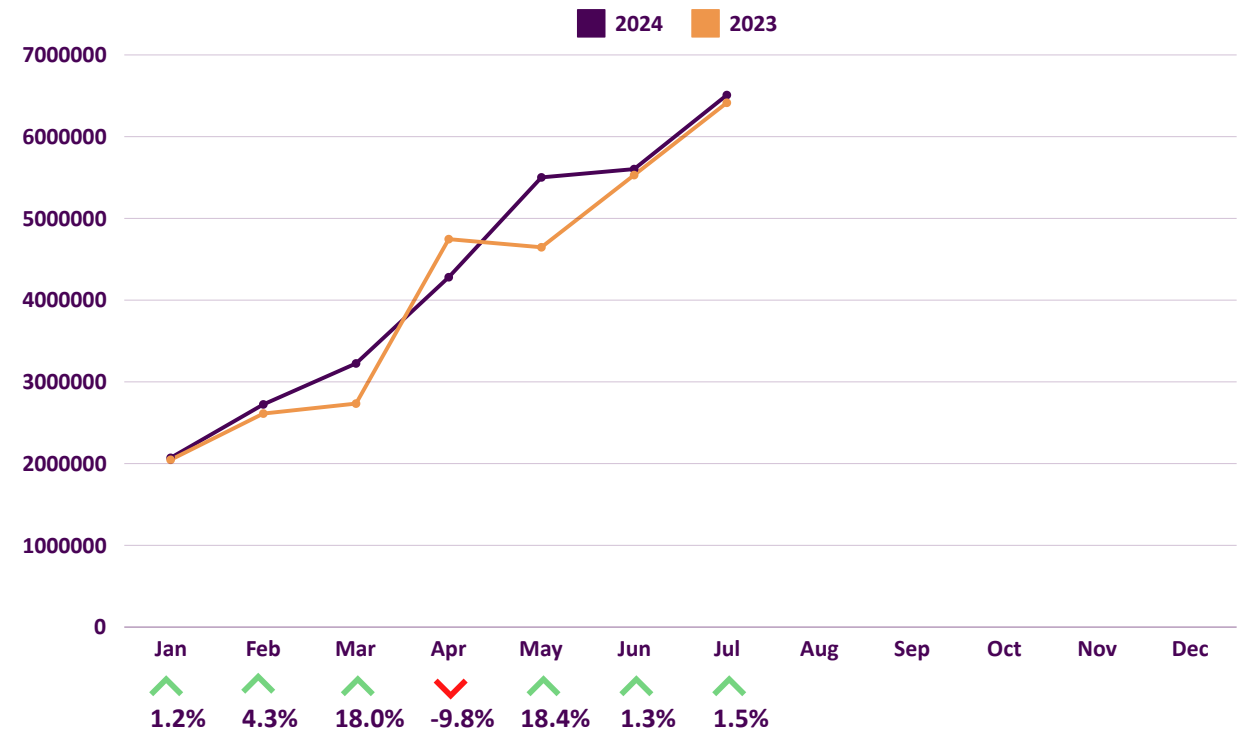
Moffat Centre for Travel and Tourism Business Development

Glasgow Caledonian University



HIGHLIGHTS

Monthly Comparison



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

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

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

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

Attractions in the Heritage Centre category recorded the greatest percentage decrease in visits compared to July 2023.

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

Attractions in Accessible Small Towns saw the most significant increase when comparing July 2024 with July 2023.

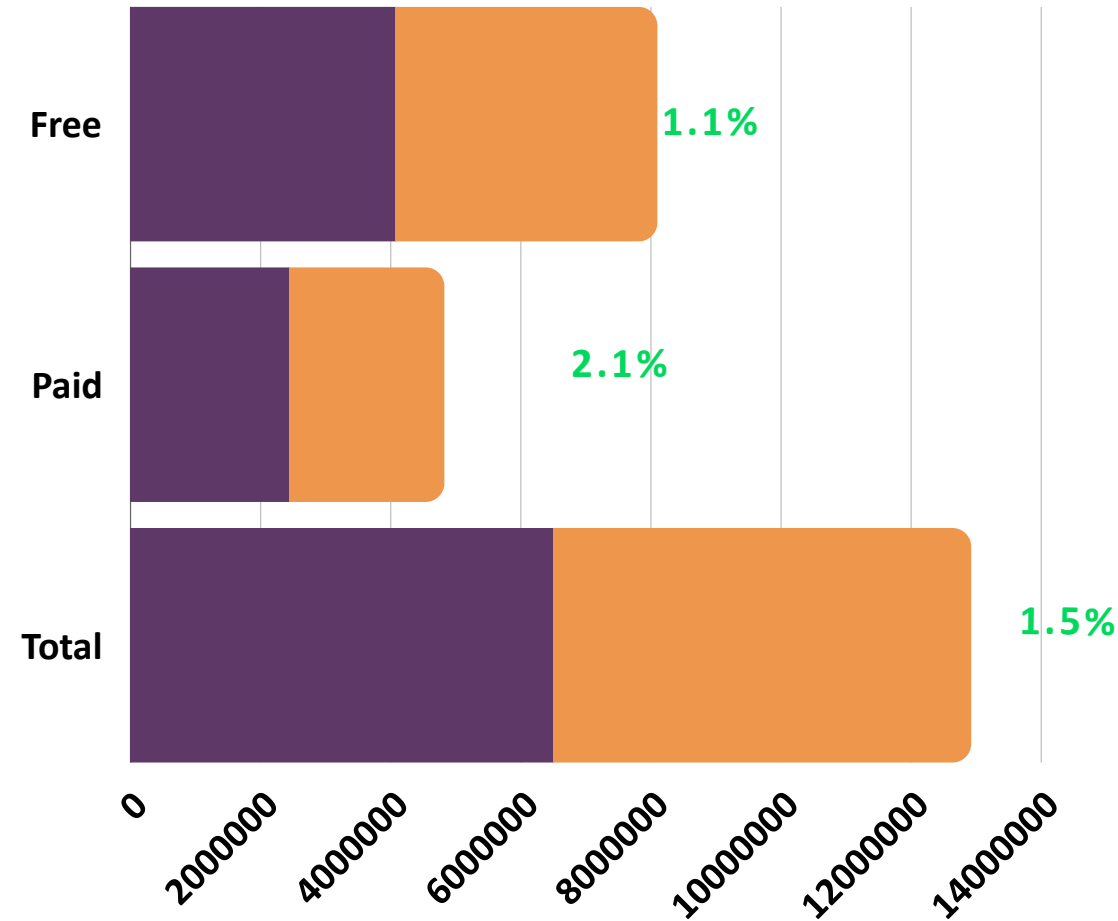
The most significant percentage increase in visits by Council Area (reporting 3+ attractions) was experienced by attractions in the Clackmannanshire Area followed by the Angus Area. Visitor Attractions in the Glasgow City Area experienced the most significant percentage decrease in visits when comparing July 2024 with July 2023.

ADMISSIONS

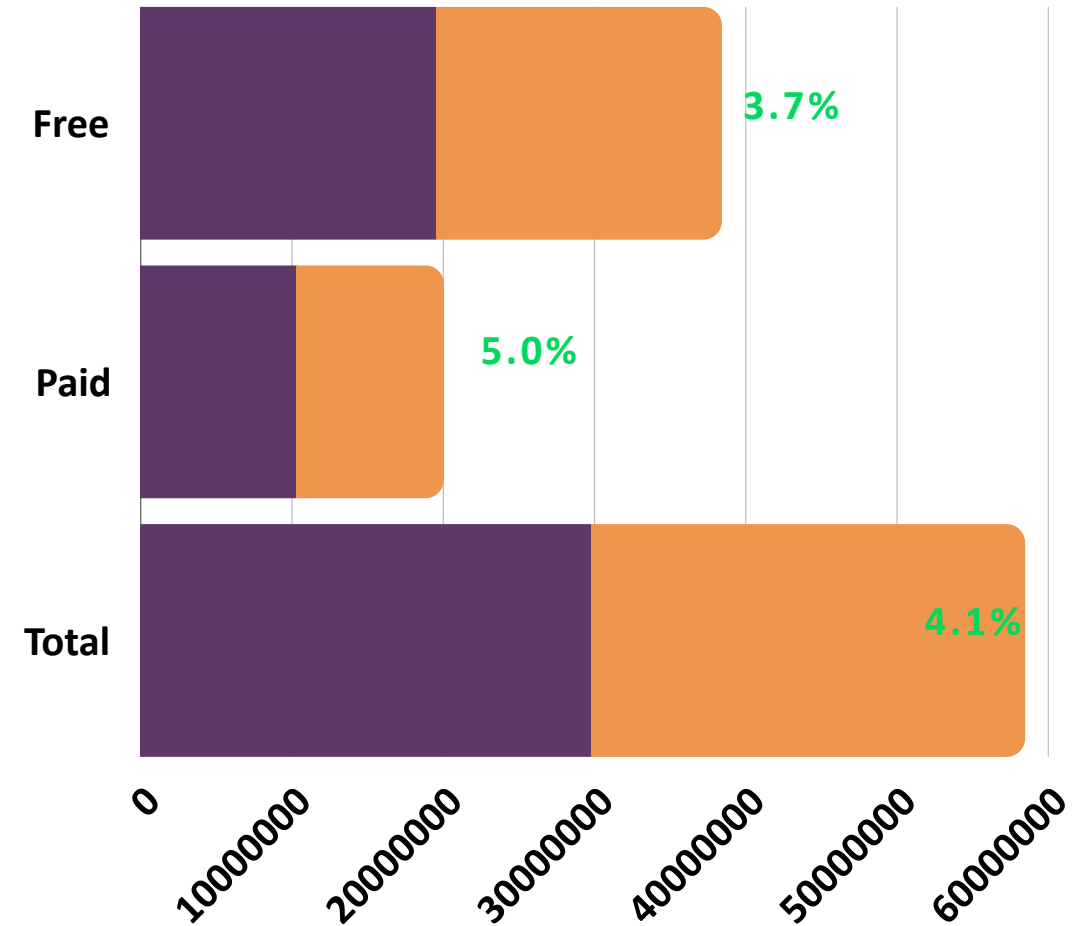
Policy Overview

2024 2023

July 2024 vs. July 2023 Comparison



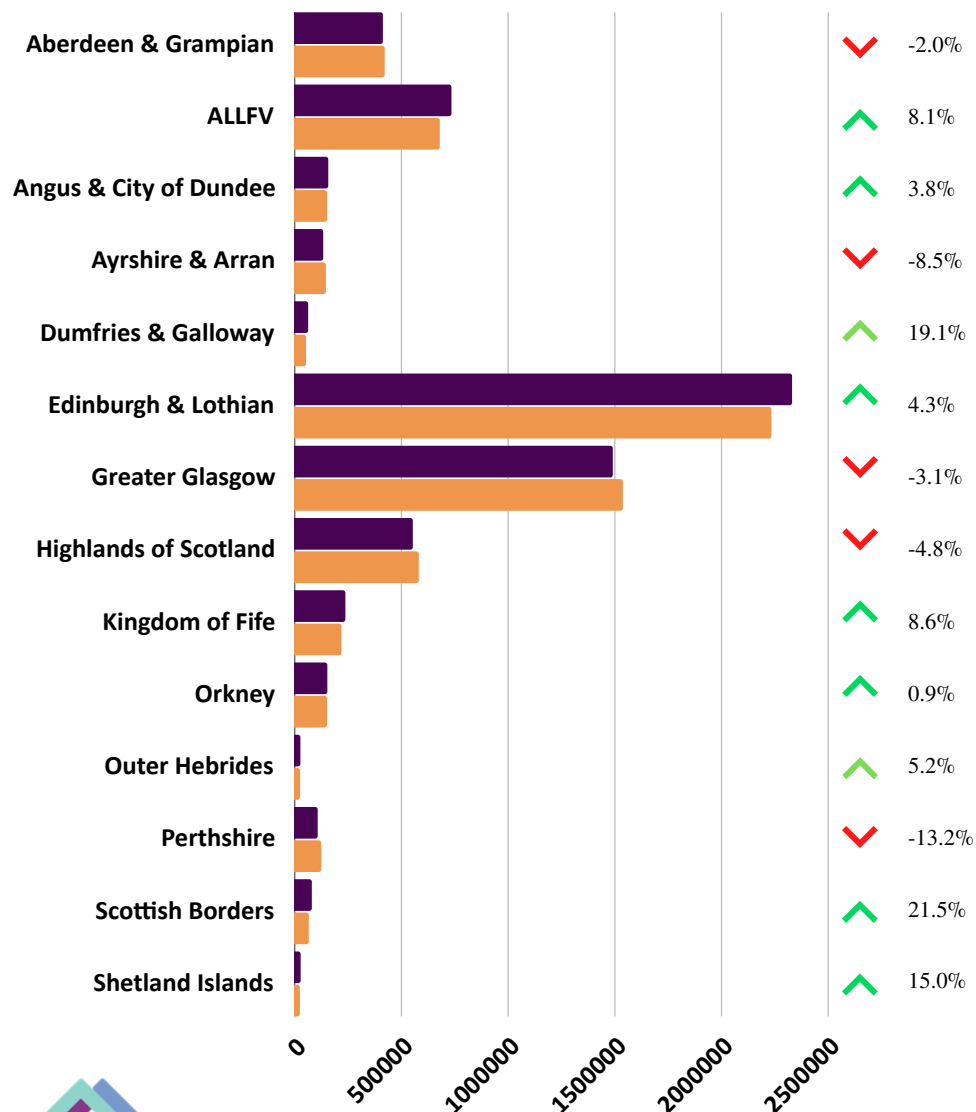
Year to Date 24 vs. 23 Comparison



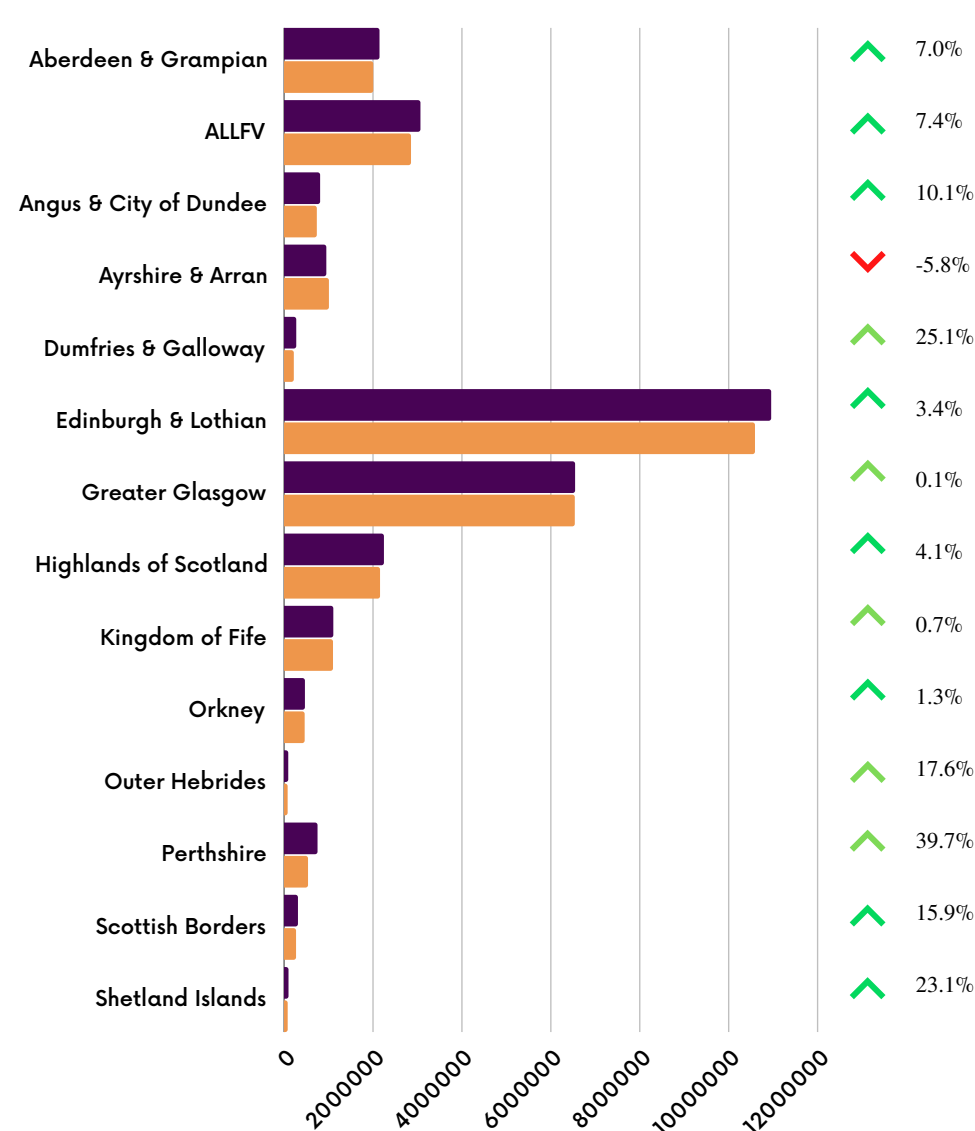
PERFORMANCE

By Former Visit Scotland Area

2024 July (vs. 2023)



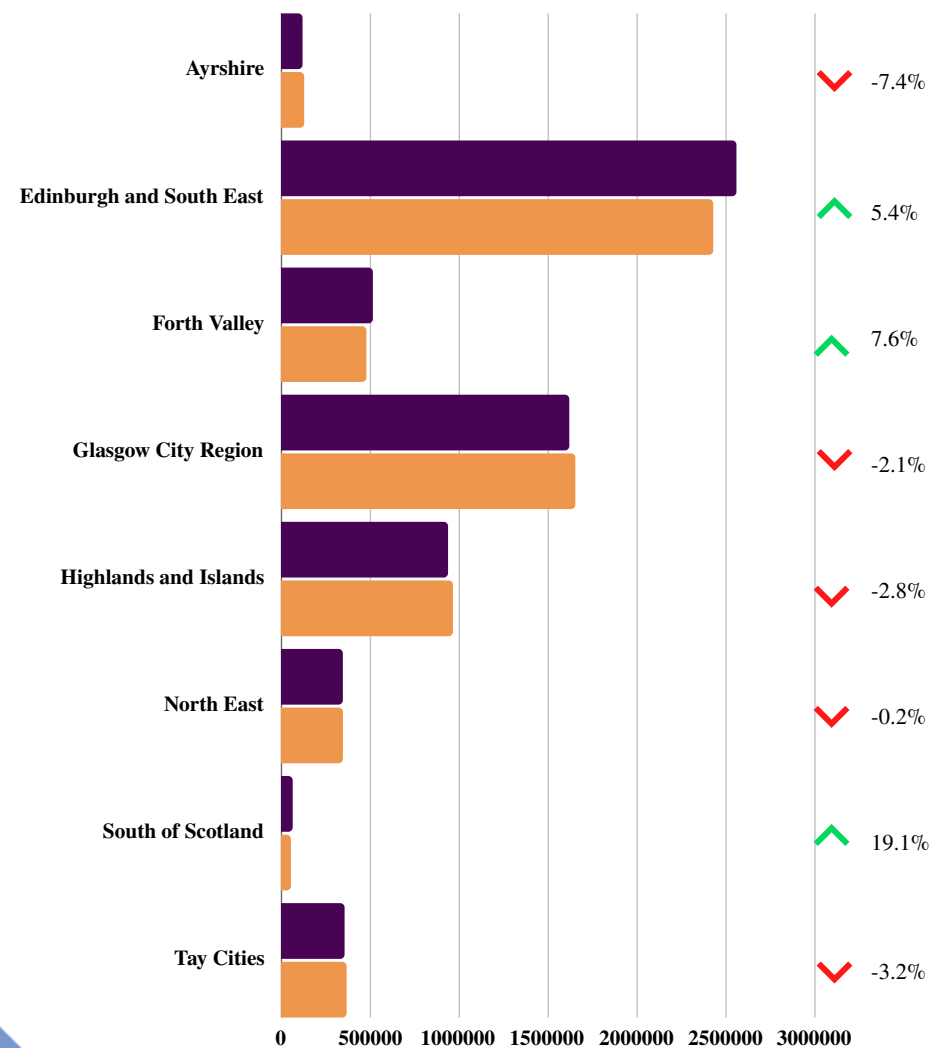
2024 Year to Date (vs. 2023)



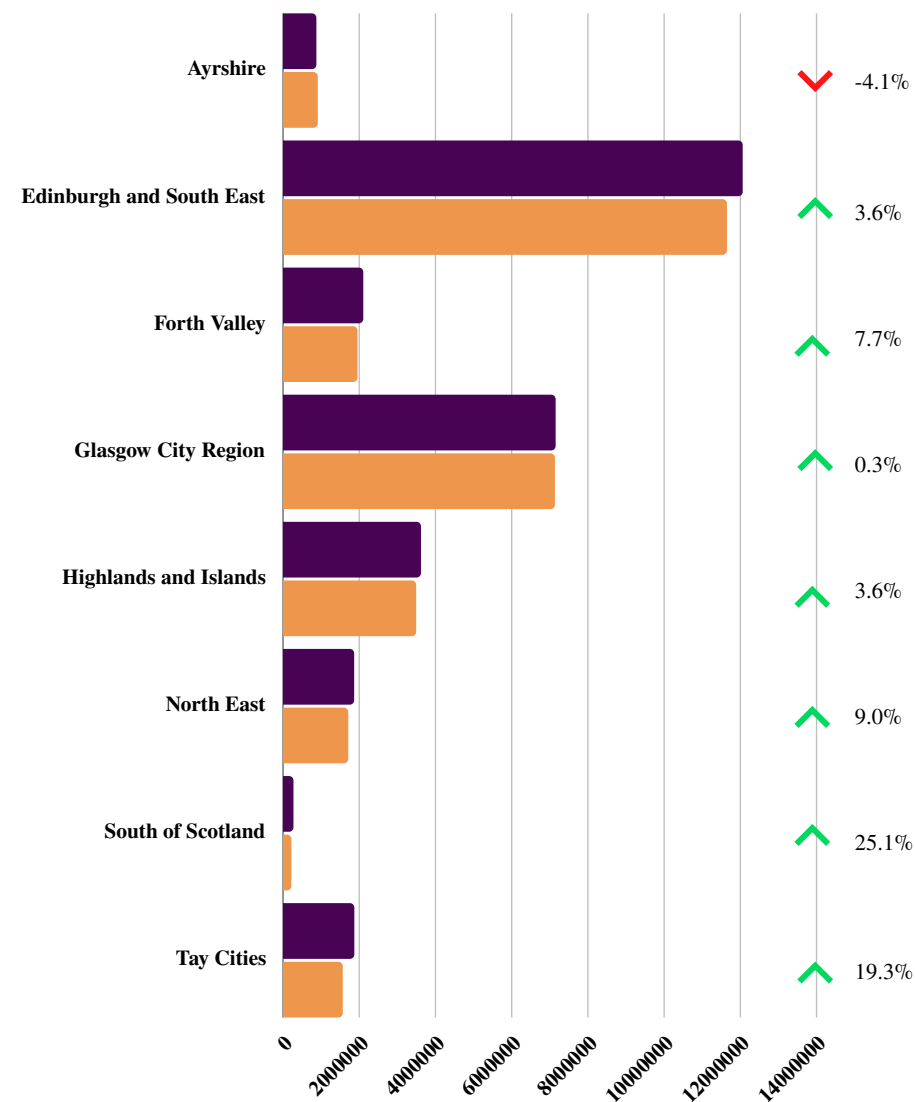
PERFORMANCE

By Regional Economic Partnerships

2024 July (vs. 2023)



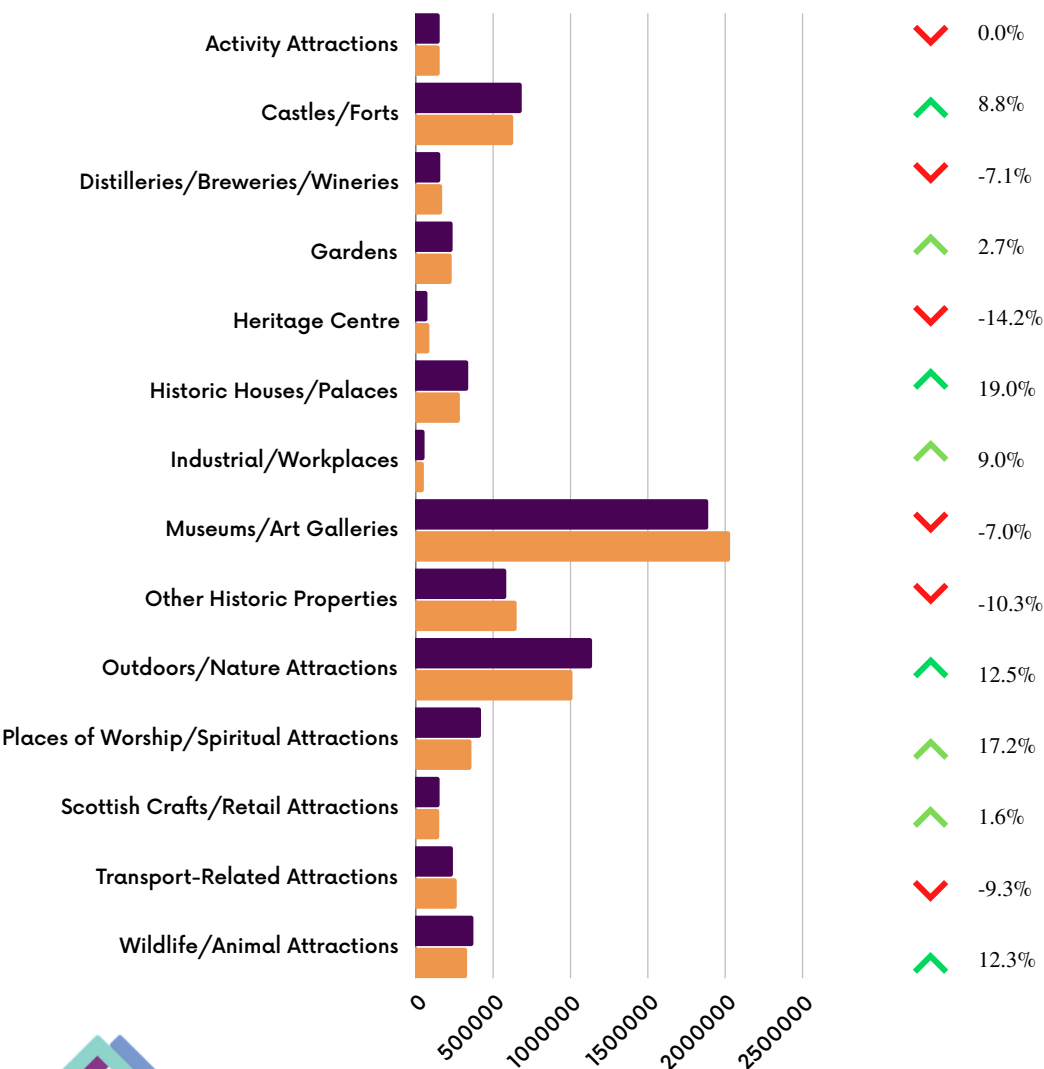
2024 Year to Date (vs. 2023)



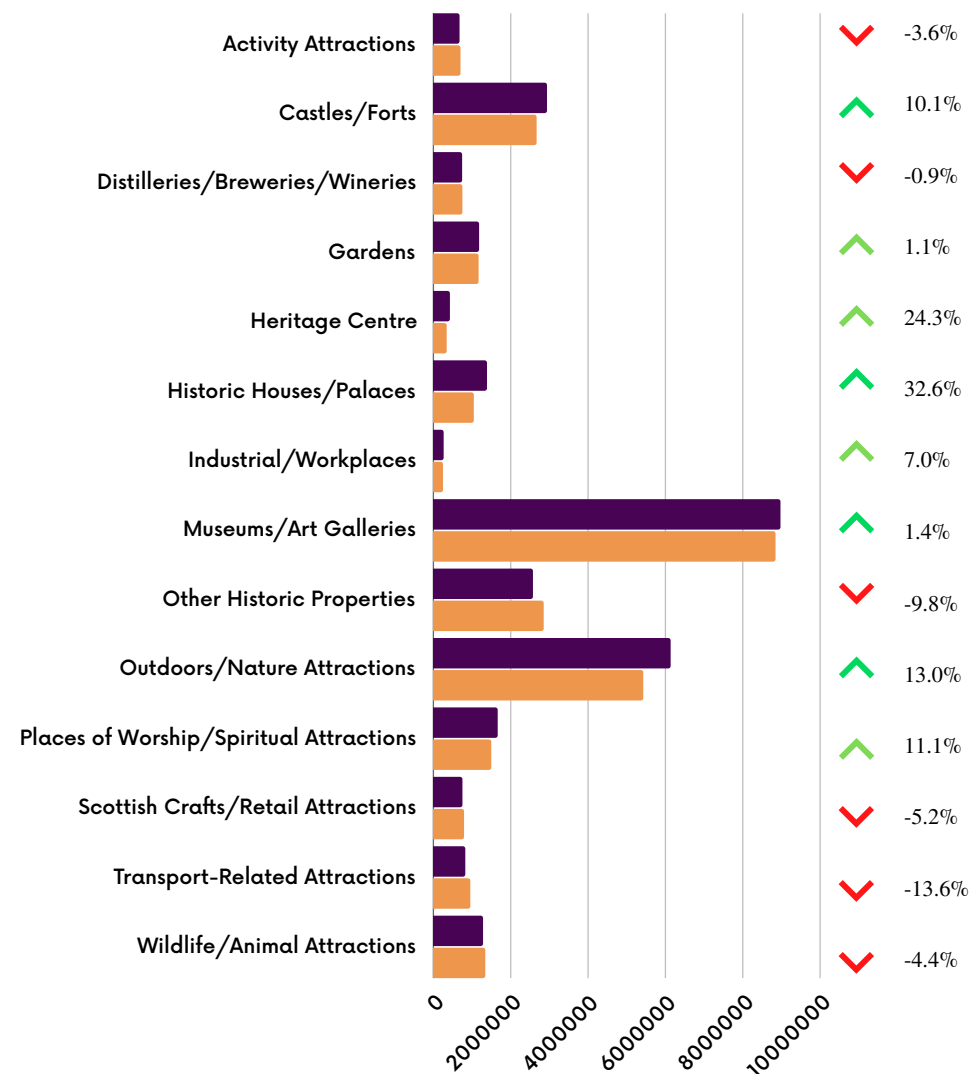
PERFORMANCE

By Attraction Category

2024 July (vs. 2023)



2024 Year to Date (vs. 2023)



PERFORMANCE

By Location Accessibility & Density

2024 July (vs. 2023)

10%

Accessible Rural

17%

Accessible Small Towns

-0%

Large Urban Areas

6%

Other Urban Areas

-7%

Remote Rural

5%

Remote Small Towns

2024 Year to Date (vs. 2023)

6%

Accessible Rural

26%

Accessible Small Towns

2%

Large Urban Areas

9%

Other Urban Areas

1%

Remote Rural

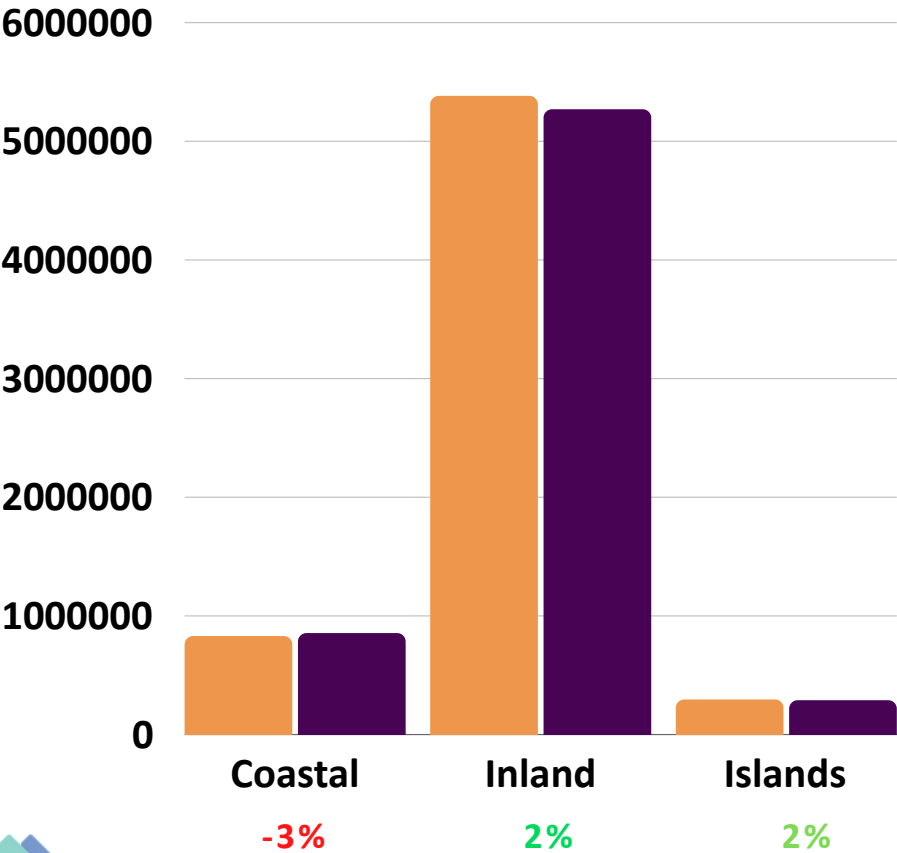
10%

Remote Small Towns

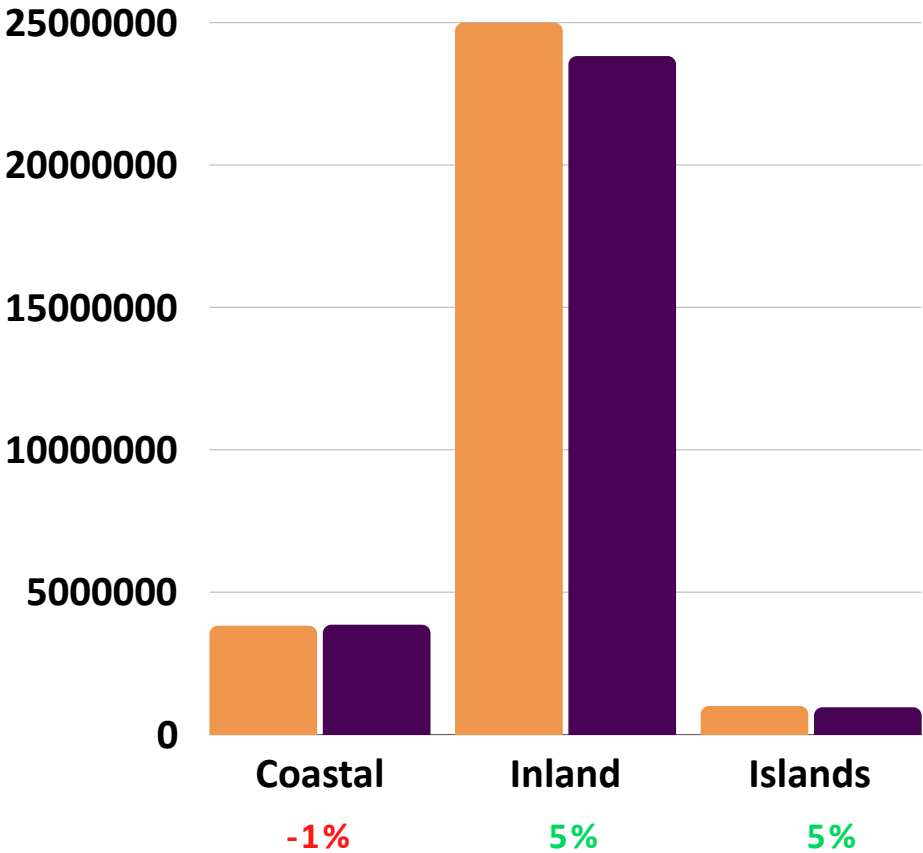
PERFORMANCE

By Geographic Location

2024 July (vs. 2023)



2024 Year to Date (vs. 2023)



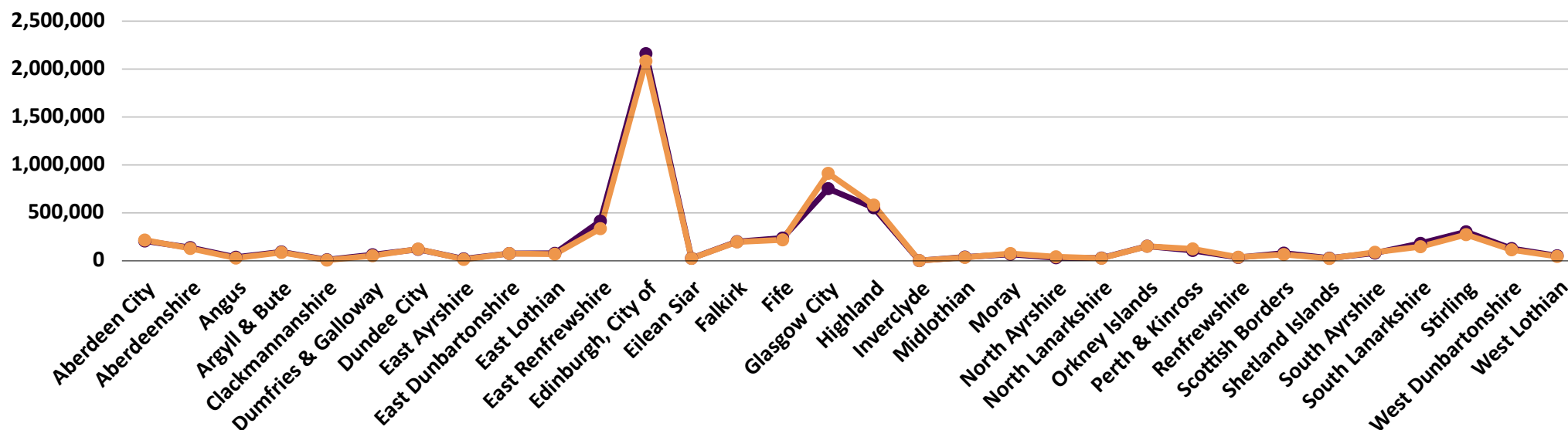
PERFORMANCE

2024

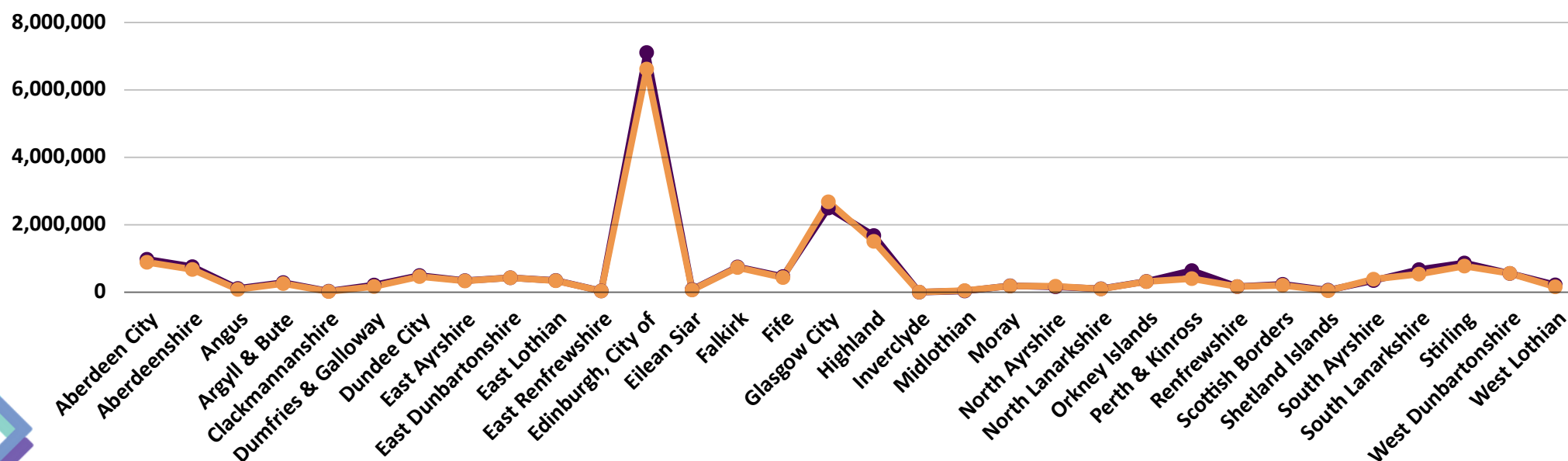
2023

By Council Area

2024 July (vs. 2023)



2024 Year to Date (vs. 2023)



PERFORMANCE

By Visit Scotland Area

2024 July (vs. 2023)

Region	No of Attractions	2024	2023	% Change
Aberdeen & Grampian	80	413079	421582	-2.0%
ALLFV	69	734556	679746	8.1%
Angus & City of Dundee	32	157300	151602	3.8%
Ayrshire & Arran	24	133554	146026	-8.5%
Dumfries & Galloway	39	63078	52983	19.1%
Edinburgh & Lothian	80	2330648	2233771	4.3%
Greater Glasgow	61	1490513	1537654	-3.1%
Highlands of Scotland	58	553428	581405	-4.8%
Kingdom of Fife	35	237437	218666	8.6%
Orkney	21	152916	151585	0.9%
Outer Hebrides	11	26572	25257	5.2%
Perthshire	26	107721	124145	-13.2%
Scottish Borders	30	80166	65995	21.5%
Shetland Islands	16	27843	24213	15.0%

Year to Date 2024/2023

Region	No of Attractions	2024	2023	% Change
Aberdeen & Grampian	80	2146087	2005835	7.0%
ALLFV	69	3067058	2854800	7.4%
Angus & City of Dundee	32	810519	736187	10.1%
Ayrshire & Arran	24	949817	1008506	-5.8%
Dumfries & Galloway	39	273449	218601	25.1%
Edinburgh & Lothian	80	10955994	10591676	3.4%
Greater Glasgow	61	6545650	6538848	0.1%
Highlands of Scotland	58	2245565	2158260	4.1%
Kingdom of Fife	35	1107256	1100095	0.7%
Orkney	21	468456	462571	1.3%
Outer Hebrides	11	93689	79662	17.6%
Perthshire	26	752062	538397	39.7%
Scottish Borders	30	311801	268983	15.9%
Shetland Islands	16	99382	80730	23.1%

By Regional Economic Partnerships

2024 July (vs. 2023)

SGREP	No of Attractions	2024	2023	% Change
Ayrshire	20	118312	127816	-7.4%
Edinburgh and South East	125	2558459	2427732	5.4%
Forth Valley	34	513899	477475	7.6%
Glasgow City Region	65	1618468	1652446	-2.1%
Highlands and Islands	169	936741	964171	-2.8%
North East	53	345041	345560	-0.2%
South of Scotland	39	63078	52983	19.1%
Tav Cities	77	354813	366447	-3.2%

Year to Date 2024/2023

SGREP	No of Attractions	2024	2023	% Change
Ayrshire	20	875228	912599	-4.1%
Edinburgh and South East	125	12061966	11648892	3.6%
Forth Valley	34	2105395	1954380	7.7%
Glasgow City Region	65	7153261	7134918	0.3%
Highlands and Islands	169	3619674	3493792	3.6%
North East	53	1866727	1711911	9.0%
South of Scotland	39	273449	218601	25.1%
Tay Cities	77	1871085	1568058	19.3%

PERFORMANCE

By Attraction Category

2024 July (vs. 2023)

Category	No of Attractions	2024	2023	% Change
Activity Attractions	9	154426	154452	0.0%
Castles/Forts	56	684814	629600	8.8%
Distilleries/Breweries/Wineries	50	158225	170289	-7.1%
Gardens	25	237968	231743	2.7%
Heritage Centre	19	75260	87707	-14.2%
Historic Houses/Palaces	43	338929	284823	19.0%
Industrial/Workplaces	9	56576	51909	9.0%
Museums/Art Galleries	216	1890474	2032006	-7.0%
Other Historic Properties	59	584804	651850	-10.3%
Outdoors/Nature Attractions	47	1139615	1012921	12.5%
Places of Worship/Spiritual Attractions	15	421462	359720	17.2%
Scottish Crafts/Retail Attractions	5	153825	151364	1.6%
Transport-Related Attractions	9	240060	264691	-9.3%
Wildlife/Animal Attractions	20	372373	331555	12.3%

Year to Date 2024/2023

Category	No of Attractions	2024	2023	% Change
Activity Attractions	9	676136	701095	-3.6%
Castles/Forts	56	2937921	2669429	10.1%
Distilleries/Breweries/Wineries	50	743125	749954	-0.9%
Gardens	25	1182477	1169133	1.1%
Heritage Centre	19	427288	343904	24.3%
Historic Houses/Palaces	43	1385985	1045481	32.6%
Industrial/Workplaces	9	265360	248095	7.0%
Museums/Art Galleries	216	8975408	8847669	1.4%
Other Historic Properties	59	2574484	2852463	-9.8%
Outdoors/Nature Attractions	47	6135227	5427840	13.0%
Places of Worship/Spiritual Attractions	15	1662917	1497211	11.1%
Scottish Crafts/Retail Attractions	5	751345	792834	-5.2%
Transport-Related Attractions	9	825022	955174	-13.6%
Wildlife/Animal Attractions	20	1284090	1342869	-4.4%

By Admission Charges

2024 July (vs. 2023)

Admission	No of Attractions	2024	2023	% Change
Free	261	4071748	4027180	1.1%
Paid	321	2437063	2387450	2.1%
Total	582	6508811	6414630	1.5%

Year to Date 2024/2023

Admission	No of Attractions	2024	2023	% Change
Free	261	19559362	18865137	3.7%
Paid	321	10267423	9778014	5.0%
Total	582	29826785	28643151	4.1%

PERFORMANCE

By Volume of Visits

2024 July (vs. 2023)

VolumeVisits	No of Attractions	2024	2023	% Change
0 - 4,999	163	62179	48428	28.4%
5,000 - 9,999	78	82938	73403	13.0%
10,000 - 19,999	79	150028	144630	3.7%
20,000 - 49,999	97	486824	429249	13.4%
50,000 - 99,999	71	632362	636071	-0.6%
100,000 +	94	5094480	5082849	0.2%

Year to Date 2024/2023

VolumeVisits	No of Attractions	2024	2023	% Change
0 - 4,999	163	218935	157500	39.0%
5,000 - 9,999	78	333773	272427	22.5%
10,000 - 19,999	79	593065	547746	8.3%
20,000 - 49,999	97	2152674	1865548	15.4%
50,000 - 99,999	71	2736018	2594107	5.5%
100,000 +	94	23792320	23205823	2.5%

By Location/Density

2024 July(vs. 2023)

UrbanRural	No of Attractions	2024	2023	% Change
Accessible Rural	122	795274	722346	10.1%
Accessible Small Towns	39	168577	144194	16.9%
Large Urban Areas	117	3690170	3696428	-0.2%
Other Urban Areas	101	972701	920488	5.7%
Remote Rural	167	745301	800982	-7.0%
Remote Small Towns	36	136788	130192	5.1%

Year to Date 2024/2023

UrbanRural	No of Attractions	2024	2023	% Change
Accessible Rural	122	3306150	3117508	6.1%
Accessible Small Towns	39	1155476	921044	25.5%
Large Urban Areas	117	17073853	16796778	1.7%
Other Urban Areas	101	4797918	4385232	9.4%
Remote Rural	167	3026079	2995914	1.0%
Remote Small Towns	36	467309	426675	9.5%

By Geographic Area

2024 July (vs. 2023)

Location	No of Attractions	2024	2023	% Change
Coastal	150	830298	855299	-2.9%
Inland	362	5382814	5269938	2.1%
Islands	70	295699	289393	2.2%

Year to Date 2024/2023

Location	No of Attractions	2024	2023	% Change
Coastal	150	3823892	3857557	-0.9%
Inland	362	24999461	23826653	4.9%
Islands	70	1003432	958941	4.6%

PERFORMANCE

By Council Area

2024 July (vs. 2023)

Council	No of Attractions	2024	2023	% Change
Aberdeen City	14	207166	216565	-4.3%
Aberdeenshire	39	137875	128995	6.9%
Angus	18	37412	28504	31.3%
Argyll & Bute	32	92702	87479	6.0%
Clackmannanshire	4	11093	7409	49.7%
Dumfries & Galloway	39	63078	52983	19.1%
Dundee City	13	119632	122870	-2.6%
East Ayrshire	7	20573	14968	37.5%
East Dunbartonshire	3	76088	75658	0.6%
East Lothian	15	77925	69395	12.3%
East Renfrewshire	3	414059	335492	23.4%
Edinburgh, City of	53	2160997	2083194	3.7%
Eilean Siar	11	26572	25257	5.2%
Falkirk	11	200052	196854	1.6%
Fife	35	237437	218666	8.6%
Glasgow City	28	752826	912398	-17.5%
Highland	58	553428	581405	-4.8%
Inverclyde	2	1769	2338	-24.3%
Midlothian	4	39347	35721	10.2%
Moray	27	68038	76022	-10.5%
North Ayrshire	8	31824	42027	-24.3%
North Lanarkshire	4	29224	26873	8.8%
Orkney Islands	21	152916	151585	0.9%
Perth & Kinross	26	107977	124373	-13.2%
Renfrewshire	9	34515	37710	-8.5%
Scottish Borders	30	80166	65995	21.5%
Shetland Islands	16	27843	24213	15.0%
South Ayrshire	9	81157	89031	-8.8%
South Lanarkshire	12	182032	147185	23.7%
Stirling	19	302754	273212	10.8%
West Dunbartonshire	4	127955	114792	11.5%
West Lothian	8	52379	45461	15.2%

2024 Year to Date (vs. 2023)

Council	No of Attractions	2024	2023	% Change
Aberdeen City	14	1171005	1103208	6.2%
Aberdeenshire	39	695722	608703	14.3%
Angus	18	154318	118029	30.8%
Argyll & Bute	32	358633	322738	11.1%
Clackmannanshire	4	41511	28608	45.1%
Dumfries & Galloway	39	273449	218601	25.1%
Dundee City	13	655309	617405	6.1%
East Ayrshire	7	364948	350307	4.2%
East Dunbartonshire	3	505886	504134	0.4%
East Lothian	15	334199	324247	3.1%
East Renfrewshire	3	1508979	1310297	15.2%
Edinburgh, City of	53	10287343	9975244	3.1%
Eilean Siar	11	93689	79662	17.6%
Falkirk	11	950460	931012	2.1%
Fife	35	1107256	1100095	0.7%
Glasgow City	28	3248226	3595130	-9.7%
Highland	58	2245565	2158260	4.1%
Inverclyde	2	4247	6076	-30.1%
Midlothian	4	144240	150747	-4.3%
Moray	27	279360	293924	-5.0%
North Ayrshire	8	169582	197430	-14.1%
North Lanarkshire	4	132305	123550	7.1%
Orkney Islands	21	468456	462571	1.3%
Perth & Kinross	26	748373	520762	43.7%
Renfrewshire	9	224949	228790	-1.7%
Scottish Borders	30	311801	268983	15.9%
Shetland Islands	16	99382	80730	23.1%
South Ayrshire	9	415287	460769	-9.9%
South Lanarkshire	12	921058	770871	19.5%
Stirling	19	1113424	994760	11.9%
West Dunbartonshire	4	607611	596070	1.9%
West Lothian	8	190212	141438	34.5%

CURRENCY - OVERVIEW

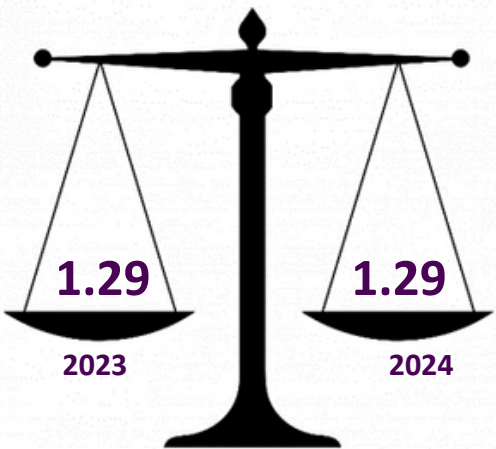
Currency Trends



£ GBP to € EUR

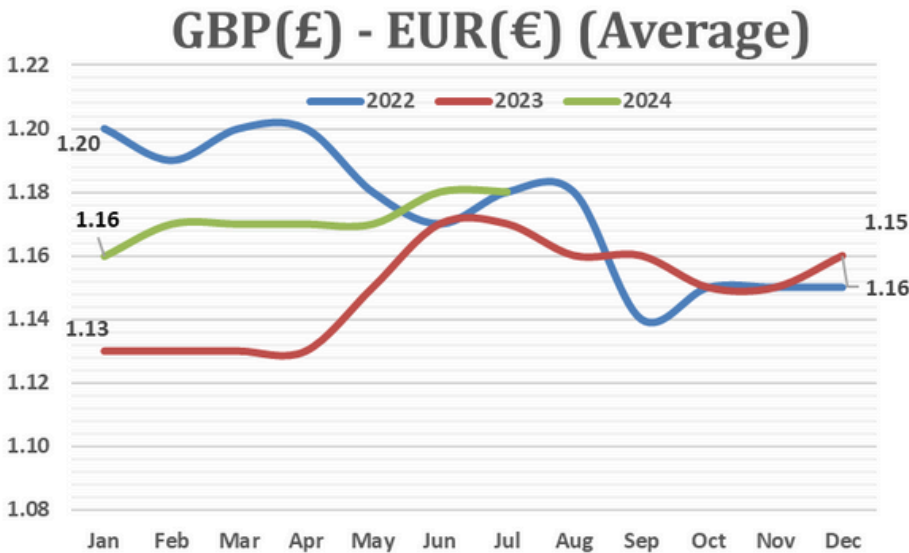


£ GBP to \$ USD

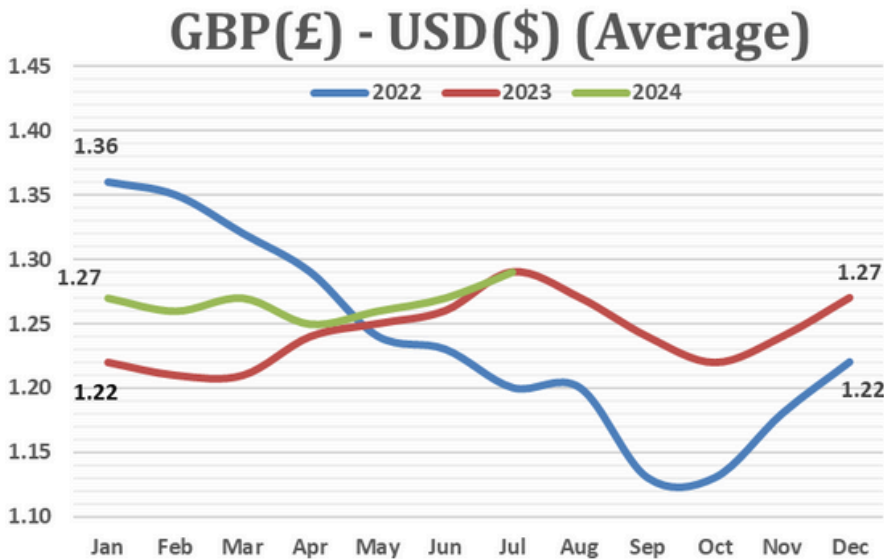


Source: www.ofx.com

£ GBP to € EUR - 3 Year Average



£ GBP to \$ USD - 3 Year Average



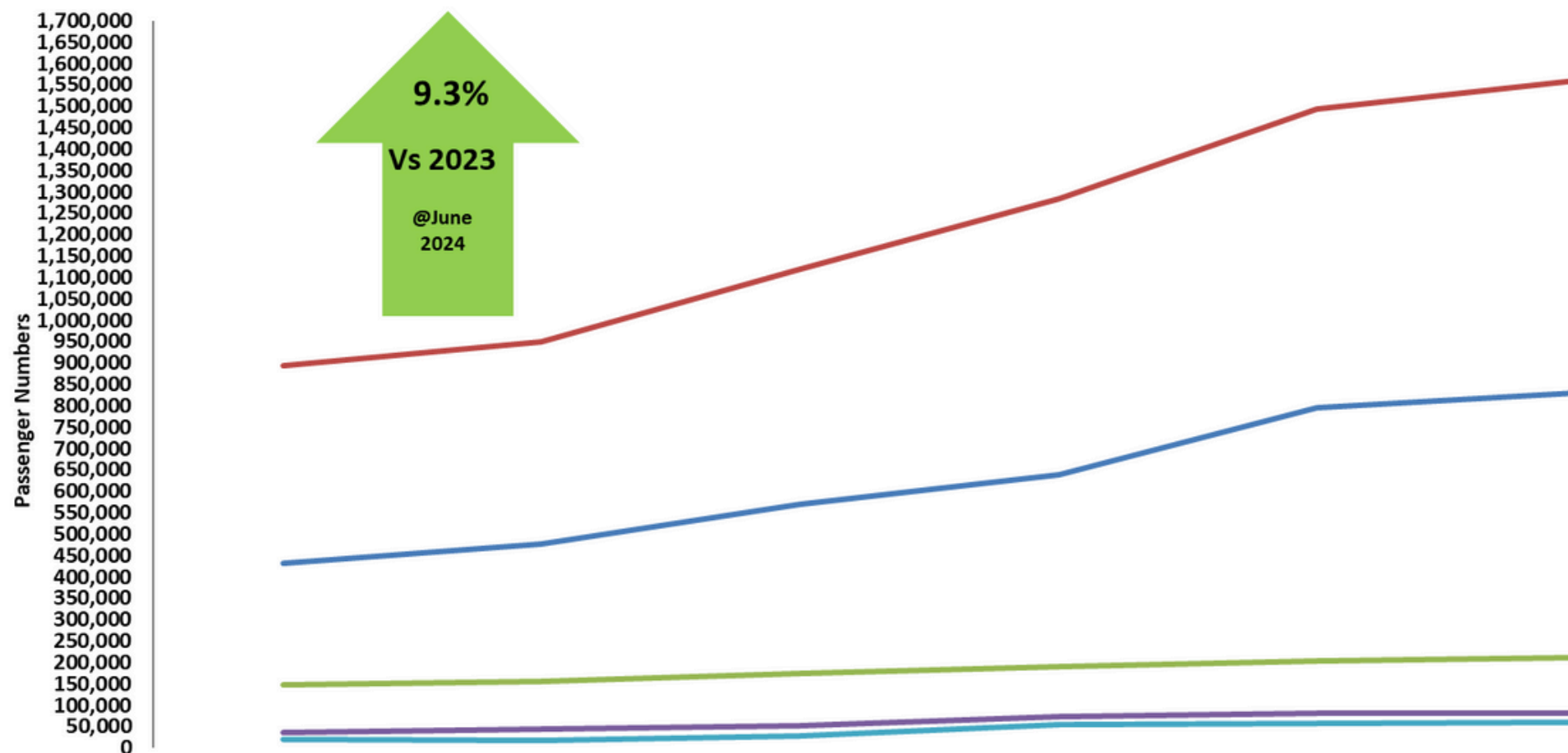
AIRPORT PASSENGER - OVERVIEW



Top Five Scottish Airports

Terminal & Transit Passengers at Scotland's Five Main Airports

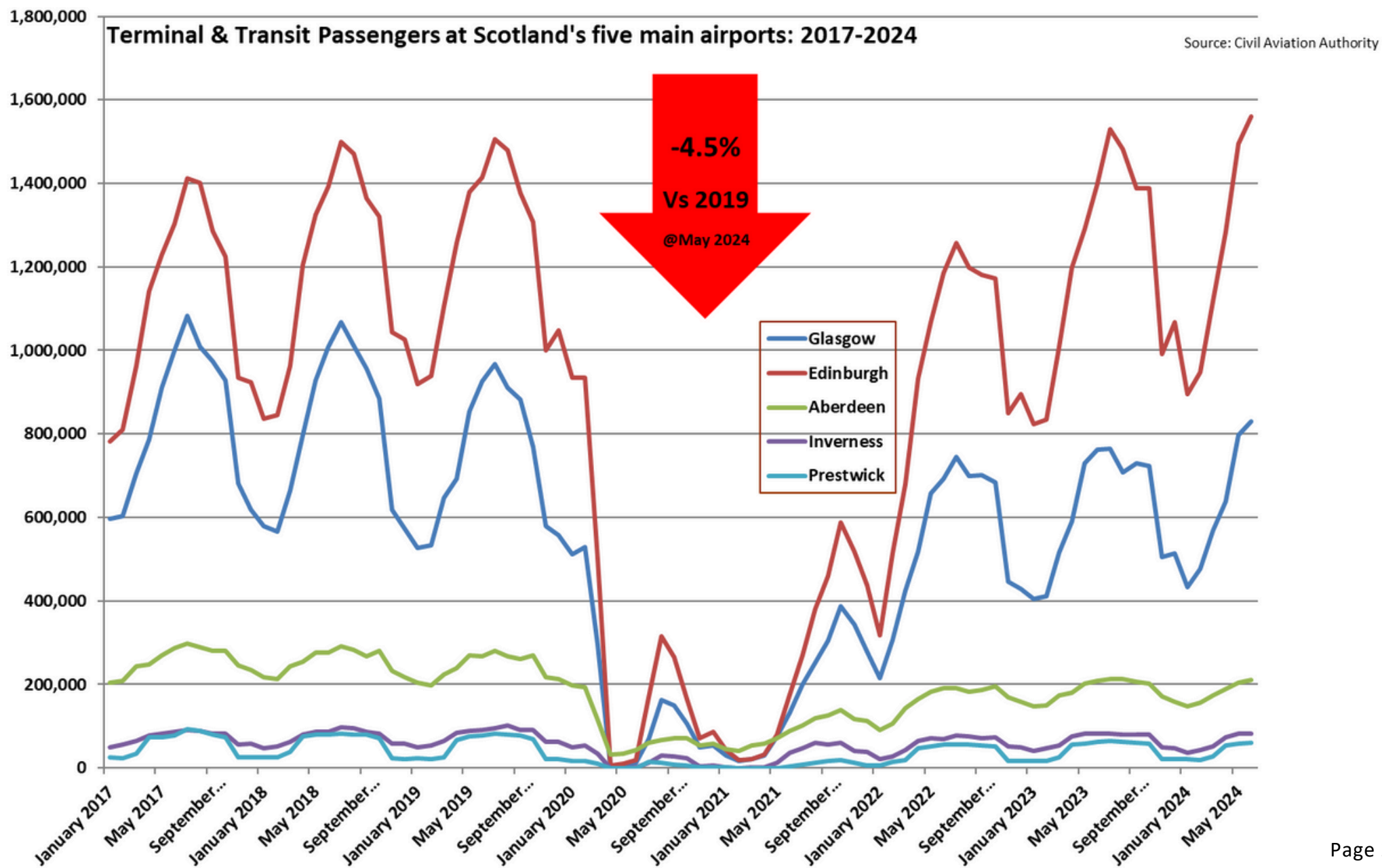
Source: Civil Aviation Authority



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

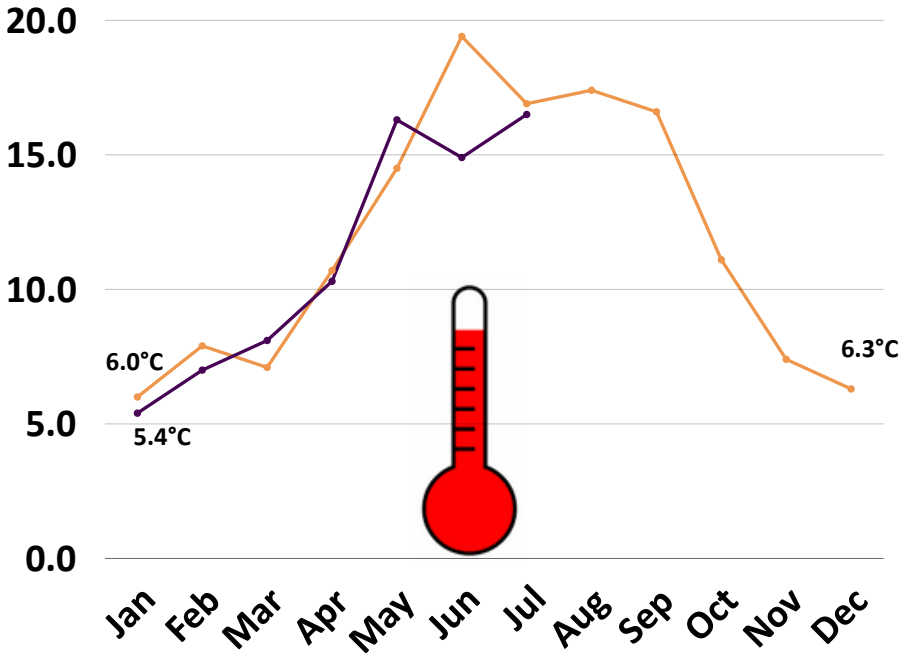


Top Five Scottish Airports

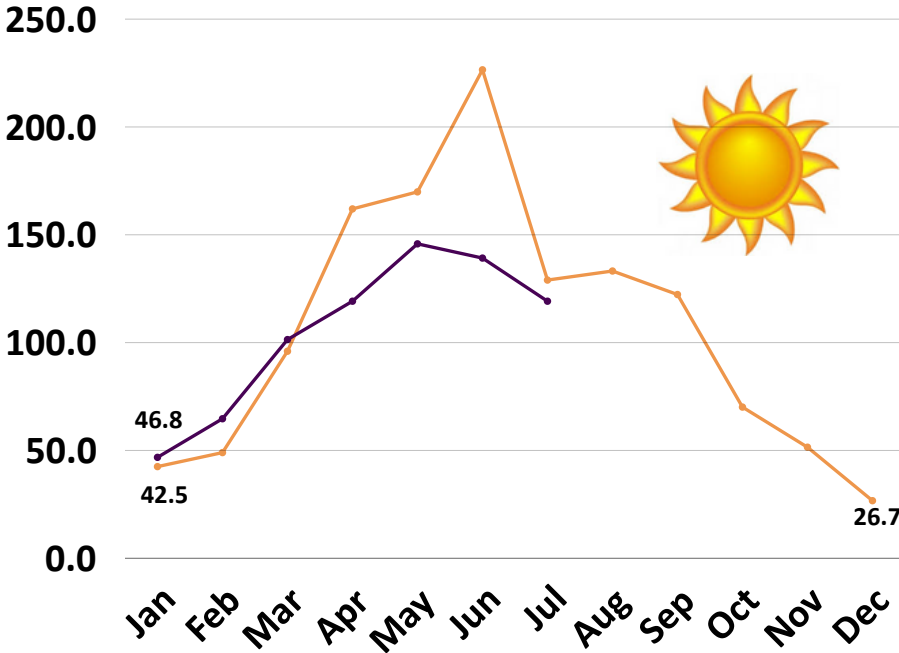


WEATHER: SCOTLAND - OVERVIEW

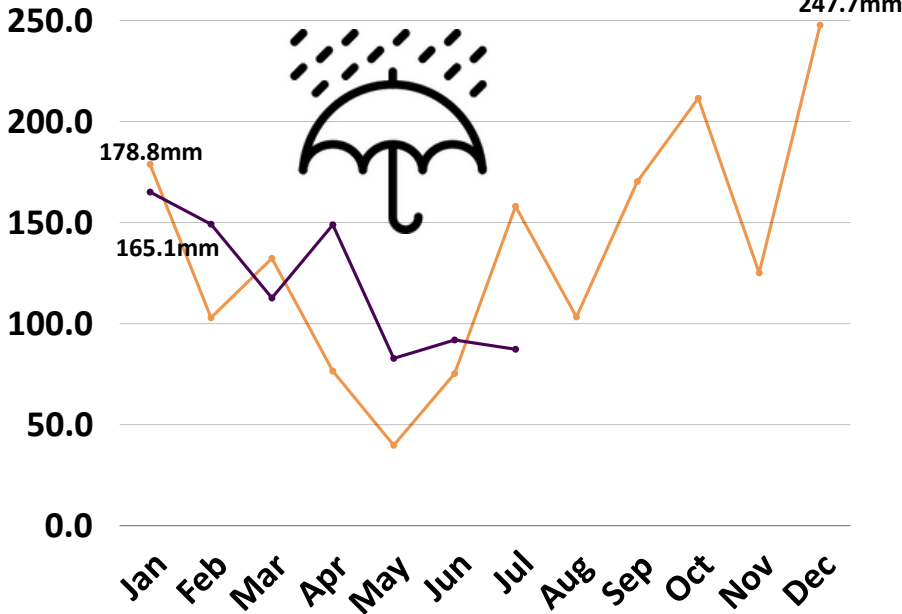
Average Temperature



Average Hours of Sunshine



Average Rainfall



NOTES - 2024

1. On Sunday 28th January 2024, a weather station in a Scottish village, Kinlochewe, in the north-west Highlands recorded 19.6°C.
2. On the 20th of February the Scottish Government launched the Gaelic Tourism Strategy for Scotland 2024-2029.
3. VisitScotland announced that the Quality Assurance (QA) scheme will end on the 31st of March 2025.
4. VisitScotland announced that all 25 information centres (iCentres) will be closed over the next two years, They will be closed via a phased closure programme by the 31st of March 2026.
5. Easter Weekend fell at the end of March (Good Friday was on the 29th).

NOTES - 2023

1. On the 28th of January Flybe, which operated scheduled services from Belfast City, Birmingham and Heathrow to airports across the United Kingdom and to Amsterdam and Geneva entered into administration.
2. The Scottish Government published 'Scotland's Marine Economic Statistics 2020' (<https://www.gov.scot/publications/scotlands-marine-economic-statistics-2020/>).
3. The 17th of February saw Storm Otto cause widespread damage throughout Scotland, especially in the Aberdeenshire area.
4. On the 29th of May Glasgow recorded 15.5 hours of sunshine, meaning, this was the sunniest location in the UK, on the 30th of May Tyndrum documented the highest temperature of the year to date at 24.5°C.
5. Scotland recorded its hottest June on record with the average temperature being 14.3°C, this was 2.7°C higher than average with parts of the Highlands recording a 3.5°C above average temperatures. (Met Office).
6. Banksy's 'Cut & Run' Exhibition took place at Glasgow's Gallery of Modern Art between the 18th of June and the 28th of August 2023, this was Banksy's first solo show in 14 years.
7. The 6th and 7th of October saw exceptional rainfall especially in Southern and Central Scotland along with the East coast. Rail services across Scotland were severely affected with many trains cancelled.
8. Storm Babet (18th - 21st of October) brought rainfall and strong winds (gusting up to 115mph in some areas) to parts of eastern Scotland with 150 to 200mm falling in the wettest areas and the Met Office issuing two red warnings for rain. For the county of Angus - coinciding with this red warning area - 19 October 2023 was, by a wide margin, the wettest day on record in a series from 1891. The main A90 trunk road was closed between Forfar and Brechin after storm Babet damaged a bridge.
9. Storm Debi (12th - 13th November) heavy rain warnings were issued for Aberdeenshire, Aberdeen, Angus and Moray. Network Scotland stated that speed limits were put in place due to the weather. Due to heavy flooding, the line between Dumfries and Sanquhar was closed.
10. December saw a further three storms impact Scotland; Storm Elin (9th) brought strong winds and heavy downpours to parts of the UK and Ireland. The warning covered Dumfries and Galloway, the Scottish Borders, Argyll and Bute, East Ayrshire, North Ayrshire, South Ayrshire and South Lanarkshire. Storm Fergus (10th) brought rain and hail to various areas in Scotland, key areas were Central, Tayside and Fife, Grampian, southwest Scotland, Lothian and Borders and North and South Lanarkshire areas. Storm Gerrit (27th-28th) brought widespread disruption across Scotland, with much of the country battered by snow, high winds and heavy rain.



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