

SCOTTISH VISITOR ATTRACTION BAROMETER REPORT: December 2014/13 REPORT

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1.0 INTRODUCTION DECEMBER 2014/2013

Welcome to the Moffat Centre Visitor Attraction Barometer covering December 2014 and December 2013. The Barometer continues to review visitor attraction performance throughout Scotland, highlighting trends across various sectors and categories of the industry as requested by attraction operators. Further comments and feedback should be directed to Marina Martinolli (Tel: 0141 331 8404, Fax: 0141 331 8411, E-mail:mma4@gcal.ac.uk).

This Barometer compares the period of December 2014 with December 2013. Some 540 attraction operators provided figures for the month of December 2013 with 532 attractions providing comparable visits figures. *The total number of visits for the responding 532 barometer attractions in Scotland for the period December 2014 was 1 667 752. When compared to data from the previous year of 1 673 939 visits, this shows a visits decrease of -0.4%.*

The following table shows total visits recorded for December 2014/2013 as well as the % change calculation.

Attractions	Dec-14	Dec-13	%Change	Jan-Dec14	Jan-Dec13	%Change
532	1 667 752	1 673 939	-0.4	38 239 427	37 848 889	1.0

A further breakdown is shown below, where the visits during the individual months of January-December 2014 can be compared with January-December 2013 with their % change calculations.

Attractions	2014		2013		%Change
	Months	Visits	Months	Visits	
532	Jan-14	1 529 938	Jan-13	1 521 431	0.6
	Feb-14	1 697 281	Feb-13	2 011 756	-15.6
	Mar-14	2 328 497	Mar-13	2 339 800	-0.5
	Apr-14	3 634 819	Apr-13	3 392 863	7.1
	May-14	3 935 716	May-13	3 771 601	4.4
	Jun-14	4 006 038	Jun-13	3 984 562	0.5
	Jul-14	5 270 696	Jul-13	5 113 886	3.1
	Aug-14	5 655 836	Aug-13	5 479 079	3.2
	Sep-14	3 491 369	Sep-13	3 521 044	-0.8
	Oct-14	2 815 863	Oct-13	2 887 478	-2.5
	Nov-14	2 205 622	Nov-13	2 151 450	2.5
	Dec-14	1 667 752	Dec-13	1 673 939	-0.4

2.0 SUMMARY

The greatest percentage increase in visits recorded by former VisitScotland Area for December 2014 was experienced by visitor attractions in Highlands of Scotland (21.7%) and Outer Hebrides (3.3%). Perthshire experienced the greatest decline in percentage of visits at -22.0%.

During this period the greatest percentage increase in visits was recorded by the Places of Worship/ Spiritual Attractions category (26.8%), followed by Other Historic Properties Attractions 23.7%. The greatest percentage decreases were experienced by the Industrial/Workplaces at -35.3% when comparing December 2014 with December 2013.

Attractions located in Accessible Small Towns experienced the greatest increases in visits of 43.7%, whilst those attractions located in Remote Rural Areas experienced the greatest percentage decrease in visits of -3.7%. Attractions welcoming 100,000 visits and over per year experienced the greatest percentage increase of 0.6%. The greatest percentage increases in visits by Council Area were experienced by attractions in West Lothian (25.7%) and Highland (21.5%). Attractions in North Ayrshire experienced the greatest percentage decrease of visits at -52.6%, followed by Perth & Kinross (-22.0%) when comparing December 2014 with December 2013.

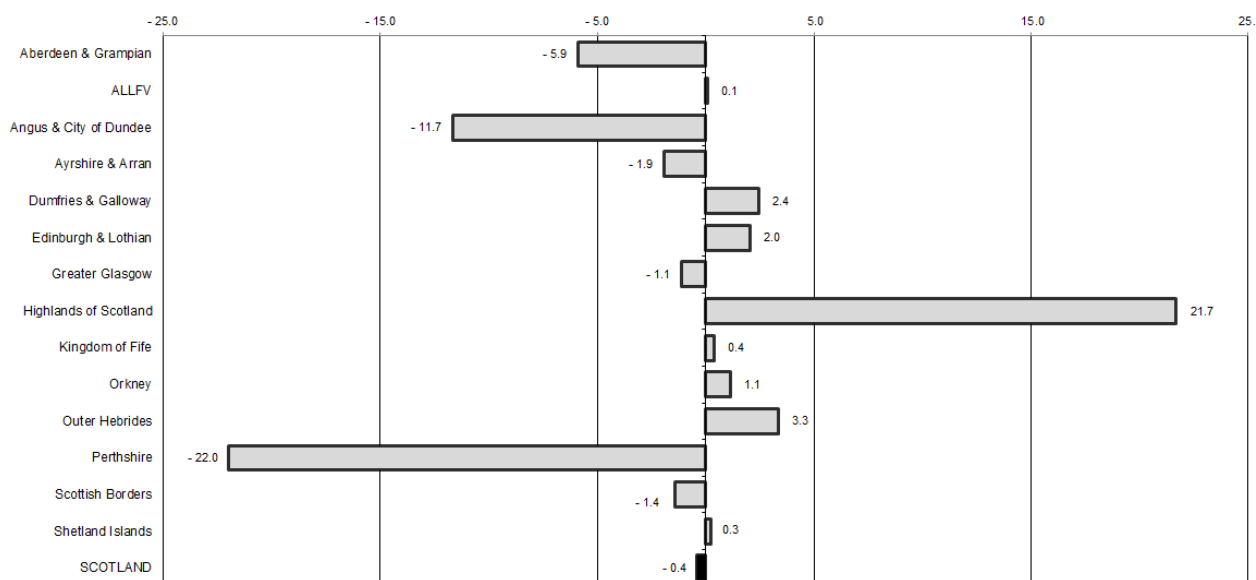
3.0 PERFORMANCE TABLES & GRAPHS

Performance by Former VisitScotland Area - December 2014/2013

Area	Dec-14	Dec-13	%Change	Jan-Dec14	Jan-Dec13	%Change
Aberdeen & Grampian (67)	74 472	79 129	-5.9	2 137 309	2 108 124	1.4
ALLFV (57)	168 710	168 557	0.1	3 832 495	3 591 503	6.7
Angus & City of Dundee (28)	47 869	54 184	-11.7	1 229 698	1 270 089	-3.2
Ayrshire & Arran (23)	134 954	137 625	-1.9	2 220 345	2 272 408	-2.3
Dumfries & Galloway (37)	10 663	10 411	2.4	460 782	449 496	2.5
Edinburgh & Lothian (63)	428 122	419 609	2.0	8 760 009	8 604 633	1.8
Greater Glasgow (54)	661 483	669 115	-1.1	13 265 128	13 201 297	0.5
Highlands of Scotland (68)	56 183	46 173	21.7	3 004 402	2 963 698	1.4
Kingdom of Fife (25)	14 740	14 684	0.4	519 611	608 189	-14.6
Orkney (22)	8 373	8 278	1.1	601 473	574 001	4.8
Outer Hebrides (10)	16 566	16 030	3.3	255 786	256 270	-0.2
Perthshire (29)	14 775	18 937	-22.0	1 101 709	1 045 187	5.4
Scottish Borders (33)	26 211	26 588	-1.4	687 607	736 461	-6.6
Shetland Islands (16)	4 631	4 619	0.3	163 073	167 533	-2.7
SCOTLAND (532)	1 667 752	1 673 939	-0.4	38 239 427	37 848 889	1.0

Note: Number in brackets indicates the number of visitor attractions per region.

Performance by Former VisitScotland Area December 2014/2013



Performance by Location (Accessibility & Density) - December 2014/2013

Location - accessibility/density	Dec-14	Dec-13	% Change	Jan-Dec14	Jan-Dec13	%Change
Large Urban Areas (82)	934 171	933 607	0.1	19 066 773	18 870 370	1.0
Other Urban Areas (86)	431 281	441 163	-2.2	7 318 328	7 343 544	-0.3
Accessible Small Towns (40)	22 945	15 963	43.7	715 561	566 765	26.3
Remote Small Towns (35)	47 078	46 104	2.1	1 222 766	1 212 691	0.8
Accessible Rural (113)	153 859	155 643	-1.1	4 789 045	4 859 576	-1.5
Remote Rural (176)	78 418	81 459	-3.7	5 126 954	4 995 943	2.6
SCOTLAND (532)	1 667 752	1 673 939	-0.4	38 239 427	37 848 889	1.0

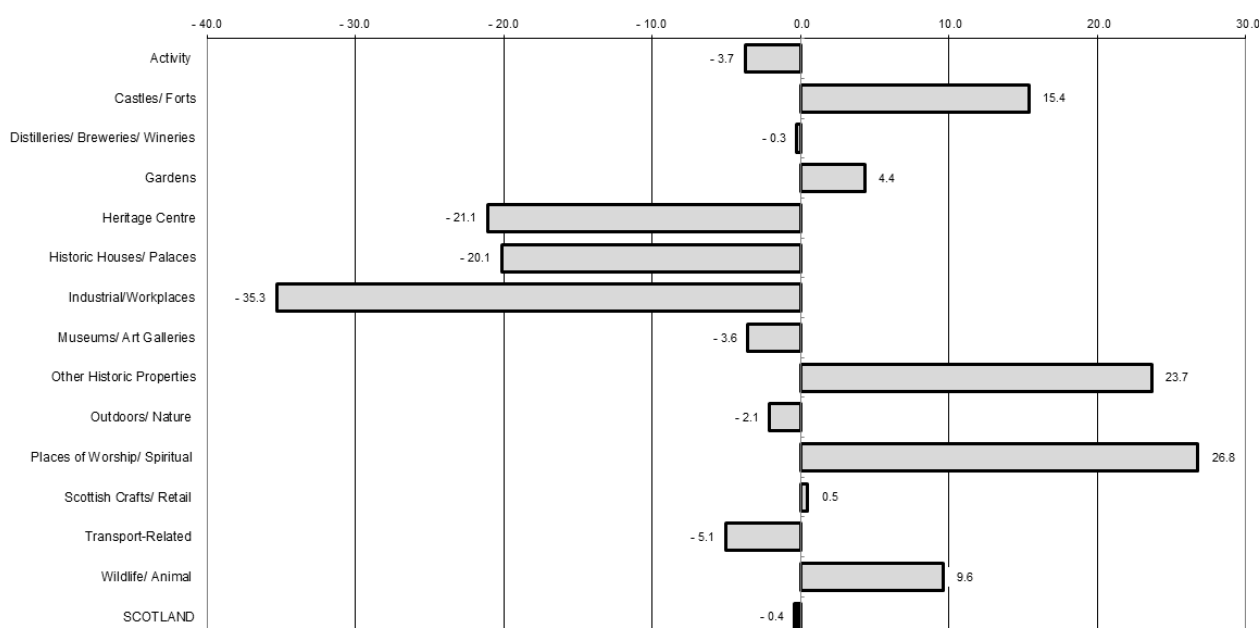
Performance by Location (Geographic) - December 2014/2013

Location - geographic	Dec-14	Dec-13	% Change	Jan-Dec14	Jan-Dec13	%Change
Coastal (202)	373 106	364 385	2.4	9 582 929	9 108 712	5.2
Inland (269)	1 264 457	1 276 973	-1.0	27 261 458	27 326 757	-0.2
Islands (61)	30 189	32 581	-7.3	1 395 040	1 413 420	-1.3
SCOTLAND (532)	1 667 752	1 673 939	-0.4	38 239 427	37 848 889	1.0

Performance by Attraction Category - December 2014/2013

Category	Dec-14	Dec-13	% Change	Jan-Dec14	Jan-Dec13	%Change
Activity Attractions (5)	14 909	15 489	-3.7	539 723	546 435	-1.2
Castles/Forts (59)	111 560	96 679	15.4	3 930 850	3 792 074	3.7
Distilleries/Breweries/Wineries (29)	33 304	33 389	-0.3	907 846	858 338	5.8
Gardens (23)	31 160	29 859	4.4	762 988	775 066	-1.6
Heritage Centre (21)	18 274	23 162	-21.1	716 482	686 117	4.4
Historic Houses/Palaces (42)	12 084	15 128	-20.1	1 103 499	1 120 625	-1.5
Industrial/Workplaces (8)	14 423	22 285	-35.3	354 029	374 330	-5.4
Museums/Art Galleries (194)	539 101	558 969	-3.6	10 917 223	10 590 340	3.1
Other Historic Properties (54)	45 945	37 154	23.7	1 253 262	1 184 942	5.8
Outdoors/Nature Attractions (46)	616 335	629 441	-2.1	12 354 917	12 772 668	-3.3
Places of Worship/Spiritual Attractions (17)	81 363	64 185	26.8	1 886 774	1 799 261	4.9
Scottish Crafts/Retail Attractions (5)	46 521	46 300	0.5	475 468	502 722	-5.4
Transport-Related Attractions (6)	57 734	60 806	-5.1	1 157 530	1 088 421	6.3
Wildlife/Animal Attractions (23)	45 039	41 093	9.6	1 878 836	1 757 550	6.9
SCOTLAND (532)	1 667 752	1 673 939	-0.4	38 239 427	37 848 889	1.0

Performance by Attraction Category Dec 2014/2013



Performance by Volume of Visits - December 2014/2013

Volume of Visits	Dec-14	Dec-13	% Change	Jan-Dec14	Jan-Dec13	%Change
0 - 4,999 (140)	3 961	3 971	-0.3	413 293	382 158	8.1
5,000 - 9,999 (80)	10 495	10 457	0.4	633 355	647 522	-2.2
10,000 - 19,999 (97)	22 827	24 901	-8.3	1 439 270	1 391 593	3.4
20,000 - 49,999 (90)	71 790	72 515	-1.0	3 222 677	3 159 523	2.0
50,000 - 99,999 (56)	104 901	116 675	-10.1	3 586 804	3 545 063	1.2
100,000 + (69)	1 453 778	1 445 420	0.6	28 944 028	28 723 030	0.8
SCOTLAND (532)	1 667 752	1 673 939	-0.4	38 239 427	37 848 889	1.0

Performance by Admission Type - December 2014/2013

Admission	Dec-14	Dec-13	% Change	Jan-Dec14	Jan-Dec13	%Change
Free (215)	1 274 994	1 284 118	-0.7	25 189 012	25 016 473	0.7
Paid (317)	392 758	389 821	0.8	13 050 415	12 832 416	1.7
SCOTLAND (532)	1 667 752	1 673 939	-0.4	38 239 427	37 848 889	1.0

Performance by Council Area - December 2014/2013

Council Area	Dec-14	Dec-13	%Change	Jan-Dec14	Jan-Dec13	%Change
Aberdeen City (10)	31 812	35 510	-10.4	658 330	611 789	7.6
Aberdeenshire(36)	23 480	25 064	-6.3	975 338	984 969	-1.0
Angus(20)	28 838	33 983	-15.1	831 006	869 940	-4.5
Argyll & Bute(29)	3 905	4 174	-6.4	494 702	508 851	-2.8
Clackmannanshire(2)*						
Dumfries & Galloway(37)	10 663	10 411	2.4	460 782	449 496	2.5
Dundee City(8)	19 294	20 480	-5.8	409 424	409 909	-0.1
East Ayrshire(8)	110 657	104 768	5.6	1 418 976	1 443 888	-1.7
East Dunbartonshire(2)*						
East Lothian(17)	15 934	15 868	0.4	500 000	484 438	3.2
East Renfrewshire(1)*						
Edinburgh, City of(34)	397 209	390 487	1.7	7 732 330	7 618 117	1.5
Eilean Siar(10)	16 566	16 030	3.3	255 786	256 270	-0.2
Falkirk(6)	30 178	32 970	-8.5	656 655	561 590	16.9
Fife(23)	14 477	14 405	0.5	482 802	573 048	-15.7
Glasgow City(24)	240 756	241 100	-0.1	4 865 385	4 356 808	11.7
Highland(65)	56 113	46 169	21.5	2 946 533	2 904 955	1.4
Inverclyde(6)	32 099	34 753	-7.6	350 893	362 449	-3.2
Midlothian(5)	9 114	8 587	6.1	311 752	295 308	5.6
Moray(24)	19 250	18 559	3.7	561 510	570 109	-1.5
North Ayrshire(7)	3 994	8 427	-52.6	187 898	179 254	4.8
North Lanarkshire(1)*						
Orkney Islands(22)	8 373	8 278	1.1	601 473	574 001	4.8
Perth & Kinross(29)	14 775	18 937	-22.0	1 074 651	1 028 757	4.5
Renfrewshire(2)*						
Scottish Borders(33)	26 211	26 588	-1.4	687 607	736 461	-6.6
Shetland Islands(16)	4 631	4 619	0.3	163 073	167 533	-2.7
South Ayrshire(8)	20 303	24 430	-16.9	613 471	649 266	-5.5
South Lanarkshire(16)	105 203	107 891	-2.5	1 989 126	1 958 785	1.5
Stirling(18)	71 511	72 411	-1.2	2 122 245	1 970 402	7.7
West Dunbartonshire(5)	100 033	96 731	3.4	1 238 879	1 191 950	3.9
West Lothian(8)	5 865	4 667	25.7	239 552	229 393	4.4
SCOTLAND (532)	1 667 752	1 673 939	-0.4	38 239 427	37 848 889	1.0

*sample size too small to be included.