

## 2009 SCOTTISH VISITOR ATTRACTION BAROMETER January - April 2009 REPORT

Commissioned by VisitScotland

Conducted by the Moffat Centre for Travel and Tourism  
Business Development, Caledonian Business School,  
Glasgow Caledonian University



### 1.0 INTRODUCTION

The Visitor Attraction Barometer is a monthly review of attractions' performance data. Attraction visitation is considered by geographic location, sector and other key variables, providing a regular monitor of performance. If you have any comments or suggestions, please contact Marina Martinolli (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: [mma4@qcal.ac.uk](mailto:mma4@qcal.ac.uk)).

This Barometer compares the period of January-April 2009 with January-April 2008. Some 552 attraction operators provided figures for the months of January-April 2009 with 534 attractions providing comparable visits figures.

### 2.0 January-April 2009/2008

#### Summary

The total number of visits for the responding 534 barometer attractions in Scotland for the period January-April 2009 was 9,114,452. When compared to data from the previous year of 8,945,756 visits, this shows a visits increase of 1.9%. The total number of visits for responding attractions for the month of April was 3,438,936, when compared to data from the previous year of 2,986,116 this shows a visits increase of 15.2%.

The following table shows total visits recorded for April 2009/2008 and January-April 2009/2008 as well as the % change calculation.

| Attractions | Apr-09    | Apr-08    | %Change | Jan-Apr-09 | Jan-Apr-08 | %Change |
|-------------|-----------|-----------|---------|------------|------------|---------|
| 534         | 3,438,936 | 2,986,116 | 15.2    | 9,114,452  | 8,945,756  | 1.9     |

A further breakdown is shown below, where the visits during the individual months of January-April 2009 can be compared with January-April 2008 with their % change calculations.

| Attractions | Months |           | Months | Visits    | %Change |
|-------------|--------|-----------|--------|-----------|---------|
|             | Months | Visits    |        |           |         |
| 534         | Jan-09 | 1,526,705 | Jan-08 | 1,560,352 | -2.2    |
|             | Feb-09 | 1,834,726 | Feb-08 | 1,898,759 | -3.4    |
|             | Mar-09 | 2,314,085 | Mar-08 | 2,500,529 | -7.5    |
|             | Apr-09 | 3,438,936 | Apr-08 | 2,986,116 | 15.2    |

The greatest percentage increase in visits recorded by former VisitScotland Area for January- April 2009 was experienced by Scottish Borders (12.6%) and Aberdeen & Grampian (6.5%). Orkney experienced the greatest decline in visits over the same period with decreases of -9.6%. Argyll, Loch Lomond and Forth Valley experienced decreases in visits figures of -8.5%.

During this period the greatest percentage increase in visits was recorded by the Wildlife/ Farm/ Nature Reserve category (20.3%) followed by Church/ Abbey/ Cathedral sites (10.8%). The greatest decreases in visits was experienced by attractions in the Industrial/ Craft Premises category at -17.4%, followed by Distillery sites (-8.6%) and Historic House/ Palace category attractions (-7.8%).

Attractions in Urban and Rural locations experienced increases in visits of 2.3% and 1.4% respectively; whilst visits to attractions in Seaside locations experienced minimal decreases of -0.1%. Attractions of all sizes experienced increases in visits numbers comparing January-April 2009 with January-April 2008, with those welcoming between 20,000 and 49,999 experiencing the greatest increases at 3.7%.

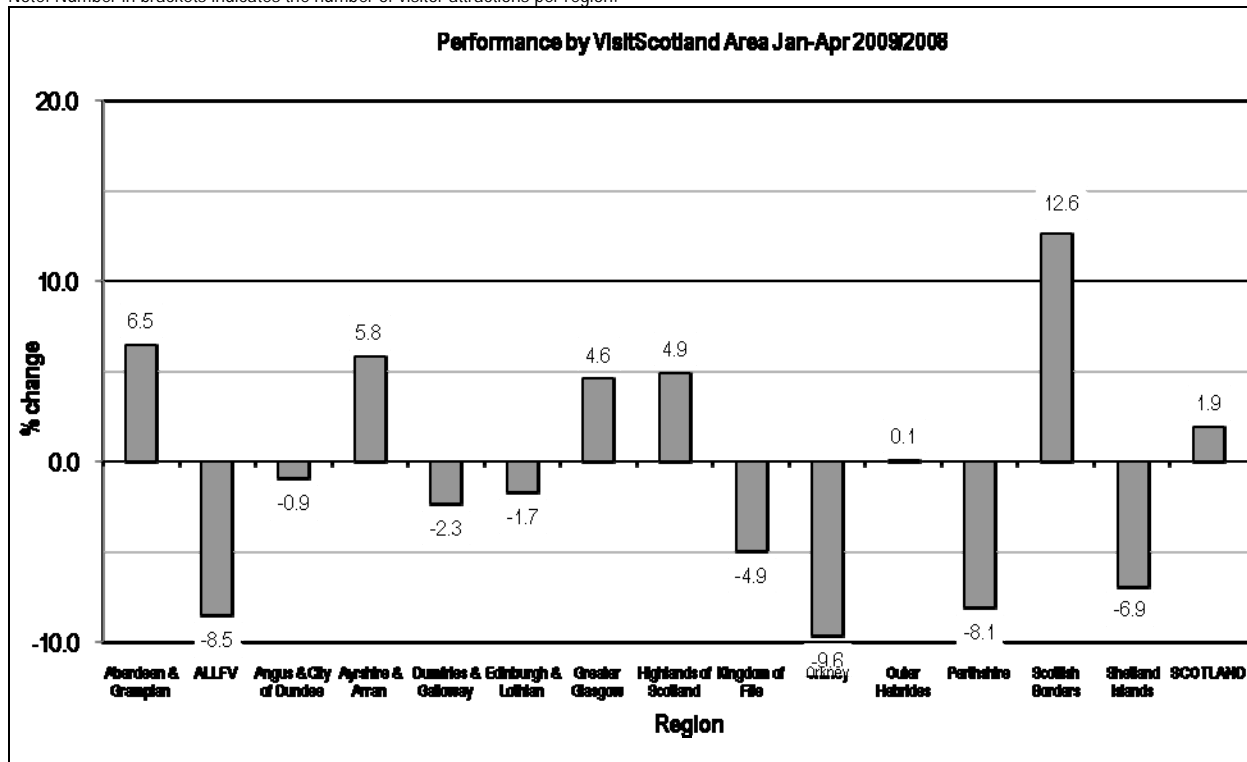
Both Free and Paid admission attractions experienced increases of 2.2% and 0.8% respectively. The greatest increases in visits by former LEC area were experienced by attractions in Lochaber (25.9%) and Borders (12.6%). Orkney experienced the greatest decrease of -9.6% followed by Shetland and Caithness & Sutherland with decreases of -6.9% and -6.7% respectively when comparing January-April 2009 with January-April 2008.

**3.0 PERFORMANCE BY FORMER VISITSCOTLAND AREA**

Performance by Former VisitScotland Area – April 2009/2008 and January-April 2009/2008

| Area                        | Apr-09           | Apr-08           | %Change     | Jan-Apr-09       | Jan-Apr-08       | %Change    |
|-----------------------------|------------------|------------------|-------------|------------------|------------------|------------|
| Aberdeen & Grampian (64)    | 139,779          | 113,376          | 23.3        | 383,108          | 359,762          | 6.5        |
| ALLFV (59)                  | 214,165          | 200,766          | 6.7         | 433,042          | 473,401          | -8.5       |
| Angus & City of Dundee (25) | 73,111           | 69,349           | 5.4         | 174,282          | 175,937          | -0.9       |
| Ayrshire & Arran (16)       | 127,584          | 107,246          | 19.0        | 264,124          | 249,622          | 5.8        |
| Dumfries & Galloway (37)    | 51,489           | 45,384           | 13.5        | 100,984          | 103,370          | -2.3       |
| Edinburgh & Lothian (72)    | 814,346          | 705,382          | 15.4        | 2,165,609        | 2,202,383        | -1.7       |
| Greater Glasgow (63)        | 1,529,068        | 1,320,693        | 15.8        | 4,597,397        | 4,395,743        | 4.6        |
| Highlands of Scotland (66)  | 260,809          | 219,538          | 18.8        | 508,443          | 484,599          | 4.9        |
| Kingdom of Fife (27)        | 59,785           | 55,557           | 7.6         | 134,892          | 141,913          | -4.9       |
| Orkney (22)                 | 24,007           | 25,355           | -5.3        | 37,183           | 41,153           | -9.6       |
| Outer Hebrides (10)         | 23,441           | 20,124           | 16.5        | 65,063           | 65,016           | 0.1        |
| Perthshire (23)             | 63,270           | 58,778           | 7.6         | 130,440          | 141,945          | -8.1       |
| Scottish Borders (32)       | 51,011           | 36,953           | 38.0        | 96,076           | 85,332           | 12.6       |
| Shetland Islands (18)       | 7,071            | 7,615            | -7.1        | 23,809           | 25,580           | -6.9       |
| <b>SCOTLAND (534)</b>       | <b>3,438,936</b> | <b>2,986,116</b> | <b>15.2</b> | <b>9,114,452</b> | <b>8,945,756</b> | <b>1.9</b> |

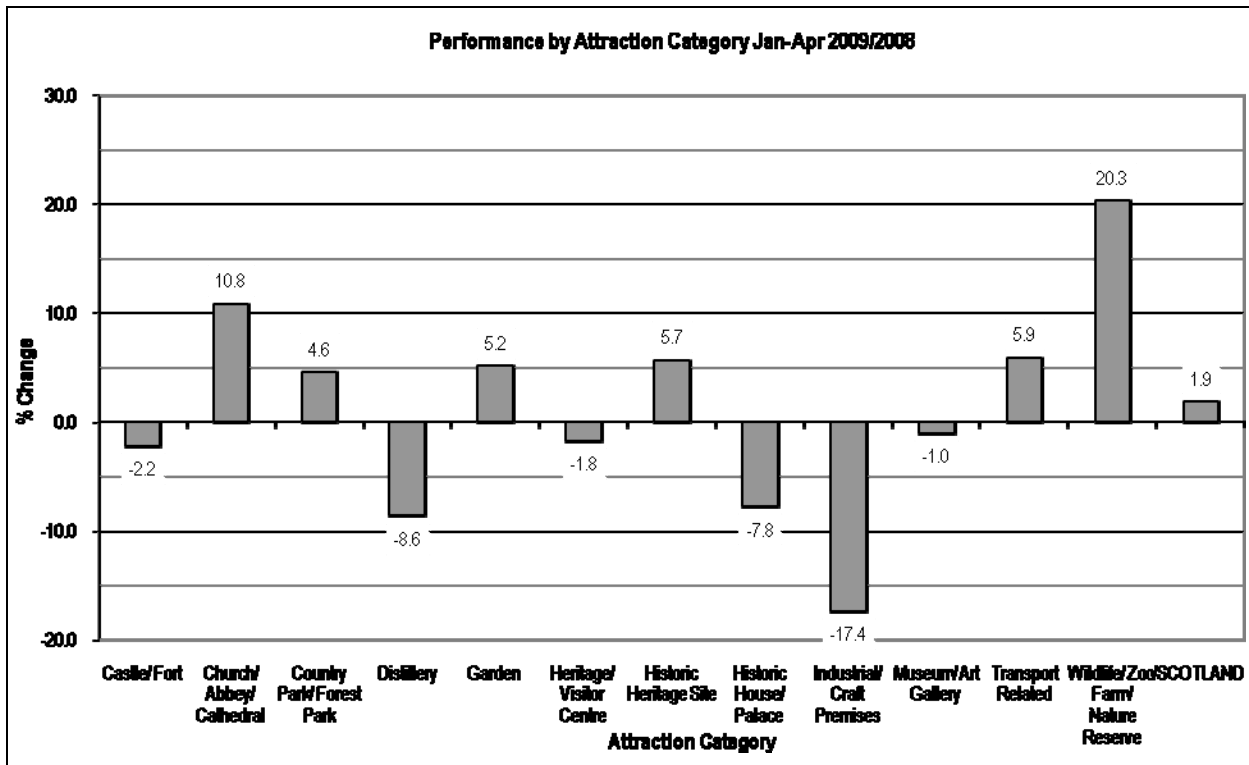
Note: Number in brackets indicates the number of visitor attractions per region.



**4.0 PERFORMANCE BY ATTRACTION CATEGORY**

Performance by Attraction Category – April 2009/2008 and January-April 2009/2008

| Category                                 | Apr-09           | Apr-08           | % Change    | Jan-Apr-09       | Jan-Apr-08       | % Change   |
|--|------------------|------------------|-------------|------------------|------------------|------------|
| Castle/ Fort (59)                        | 324,559          | 288,183          | 12.6        | 614,710          | 628,632          | -2.2       |
| Church/ Abbey/ Cathedral (22)            | 105,483          | 78,056           | 35.1        | 252,249          | 227,559          | 10.8       |
| Country Park / Forest Park (12)          | 1,056,601        | 949,584          | 11.3        | 3,251,532        | 3,108,418        | 4.6        |
| Distillery (26)                          | 46,202           | 42,679           | 8.3         | 92,506           | 101,259          | -8.6       |
| Garden (25)                              | 86,867           | 74,352           | 16.8        | 204,486          | 194,433          | 5.2        |
| Heritage/ Visitor Centre (85)            | 457,164          | 403,651          | 13.3        | 1,093,604        | 1,113,096        | -1.8       |
| Historic Heritage Site (38)              | 39,654           | 34,992           | 13.3        | 63,484           | 60,060           | 5.7        |
| Historic House/ Palace (42)              | 57,976           | 55,231           | 5.0         | 94,768           | 102,774          | -7.8       |
| Industrial/ Craft Premises (15)          | 14,632           | 13,933           | 5.0         | 28,401           | 34,377           | -17.4      |
| Museum/ Art Gallery (173)                | 982,298          | 853,145          | 15.1        | 2,816,884        | 2,845,873        | -1.0       |
| Transport Related (13)                   | 85,517           | 72,764           | 17.5        | 257,925          | 243,513          | 5.9        |
| Wildlife/ Zoo/ Farm/ Nature Reserve (24) | 181,983          | 119,546          | 52.2        | 343,903          | 285,762          | 20.3       |
| <b>SCOTLAND (534)</b>                    | <b>3,438,936</b> | <b>2,986,116</b> | <b>15.2</b> | <b>9,114,452</b> | <b>8,945,756</b> | <b>1.9</b> |



## 5.0 PERFORMANCE BY LOCATION

Performance by Location – April 2009/2008 and January-April 2009/2008

| Location              | Apr-09           | Apr-08           | % Change    | Jan-Apr-09       | Jan-Apr-08       | %Change    |
|-----------------------|------------------|------------------|-------------|------------------|------------------|------------|
| Rural (245)           | 1,228,485        | 1,124,136        | 9.3         | 3,317,585        | 3,272,804        | 1.4        |
| Seaside (67)          | 166,274          | 139,244          | 19.4        | 355,280          | 355,557          | -0.1       |
| Urban (222)           | 2,044,177        | 1,722,736        | 18.7        | 5,441,587        | 5,317,395        | 2.3        |
| <b>SCOTLAND (534)</b> | <b>3,438,936</b> | <b>2,986,116</b> | <b>15.2</b> | <b>9,114,452</b> | <b>8,945,756</b> | <b>1.9</b> |

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

## 6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – April 2009/2008 and January-April 2009/2008

| Volume of Visits      | Apr-09           | Apr-08           | % Change    | Jan-Apr-09       | Jan-Apr-08       | %Change    |
|-----------------------|------------------|------------------|-------------|------------------|------------------|------------|
| 1 - 19,999 (332)      | 218,616          | 189,112          | 15.6        | 362,506          | 357,469          | 1.4        |
| 20,000 - 49,999 (86)  | 246,240          | 203,525          | 21.0        | 537,070          | 517,954          | 3.7        |
| 50,000 + (116)        | 2,974,080        | 2,593,479        | 14.7        | 8,214,876        | 8,070,333        | 1.8        |
| <b>SCOTLAND (534)</b> | <b>3,438,936</b> | <b>2,986,116</b> | <b>15.2</b> | <b>9,114,452</b> | <b>8,945,756</b> | <b>1.9</b> |

Note: Number in brackets indicates the number of attractions per range of volume of visits.

## 7.0 PERFORMANCE BY ADMISSION TYPE

Performance by Admission Type – April 2009/2008 and January-April 2009/2008

| Admission             | Apr-09           | Apr-08           | % Change    | Jan-Apr-09       | Jan-Apr-08       | %Change    |
|-----------------------|------------------|------------------|-------------|------------------|------------------|------------|
| Free (223)            | 2,390,248        | 2,092,544        | 14.2        | 6,863,407        | 6,713,081        | 2.2        |
| Paid (311)            | 1,048,688        | 893,572          | 17.4        | 2,251,045        | 2,232,675        | 0.8        |
| <b>SCOTLAND (534)</b> | <b>3,438,936</b> | <b>2,986,116</b> | <b>15.2</b> | <b>9,114,452</b> | <b>8,945,756</b> | <b>1.9</b> |

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

8.0 **PERFORMANCE BY FORMER LOCAL ENTERPRISE COMPANY (LEC) AREA****Performance by Former LEC Area – April 2009/2008 and January-April 2009/2008**

| LEC                            | Apr-09           | Apr-08           | %Change     | Jan-Apr-09       | Jan-Apr-08       | %Change    |
|--------------------------------|------------------|------------------|-------------|------------------|------------------|------------|
| Argyll & The Islands (32)      | 66,220           | 53,804           | 23.1        | 101,727          | 102,675          | -0.9       |
| Ayrshire (15)                  | 124,887          | 104,164          | 19.9        | 261,427          | 246,079          | 6.2        |
| Borders (32)                   | 51,011           | 36,953           | 38.0        | 96,076           | 85,332           | 12.6       |
| Caithness & Sutherland (15)    | 20,975           | 17,826           | 17.7        | 44,845           | 48,063           | -6.7       |
| Dumfries & Galloway (36)       | 51,069           | 45,284           | 12.8        | 100,564          | 103,143          | -2.5       |
| Dunbartonshire (9)             | 104,698          | 91,382           | 14.6        | 284,598          | 304,675          | -6.6       |
| Edinburgh & Lothians (72)      | 814,346          | 705,382          | 15.4        | 2,165,609        | 2,202,383        | -1.7       |
| Fife (27)                      | 59,785           | 55,557           | 7.6         | 134,892          | 141,913          | -4.9       |
| Forth Valley (24)              | 162,899          | 151,234          | 7.7         | 345,206          | 362,560          | -4.8       |
| Glasgow (27)                   | 436,177          | 369,619          | 18.0        | 1,301,590        | 1,276,385        | 2.0        |
| Grampian (50)                  | 116,068          | 94,393           | 23.0        | 340,716          | 319,301          | 6.7        |
| Inverness & East Highland (25) | 131,859          | 104,958          | 25.6        | 279,593          | 261,811          | 6.8        |
| Lanarkshire (23)               | 920,589          | 801,629          | 14.8        | 2,833,982        | 2,666,243        | 6.3        |
| Lochaber (9)                   | 34,715           | 25,582           | 35.7        | 74,634           | 59,303           | 25.9       |
| Moray (17)                     | 24,101           | 19,714           | 22.3        | 42,678           | 41,540           | 2.7        |
| Orkney (22)                    | 24,007           | 25,355           | -5.3        | 37,183           | 41,153           | -9.6       |
| Renfrewshire (9)               | 56,766           | 57,346           | -1.0        | 164,812          | 158,533          | 4.0        |
| Shetland (18)                  | 7,071            | 7,615            | -7.1        | 23,809           | 25,580           | -6.9       |
| Skye & Wester Ross (13)        | 68,602           | 65,466           | 4.8         | 104,817          | 108,268          | -3.2       |
| Tayside (49)                   | 139,650          | 132,729          | 5.2         | 310,631          | 325,800          | -4.7       |
| Western Isles (10)             | 23,441           | 20,124           | 16.5        | 65,063           | 65,016           | 0.1        |
| <b>SCOTLAND (534)</b>          | <b>3,438,936</b> | <b>2,986,116</b> | <b>15.2</b> | <b>9,114,452</b> | <b>8,945,756</b> | <b>1.9</b> |

Note: Number in brackets indicates the number of visitor attractions per former LEC Area.

9.0 **COMMENTS**

The following quotes have been drawn from comments made by operators to explain influences on visitation performance during January-April 2009.

**Reasons for positive impacts on visitor figures:-**

Good weather in April  
Late Easter improved April figures  
Snowdrop festival  
More UK visitors

**Reasons for negative impacts in visitor figures:-**

Economic situation  
Fuel costs  
Less coaches