

**2009 SCOTTISH VISITOR ATTRACTION BAROMETER  
July 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 July 2009 with July 2008. Some 543 attraction operators provided figures for the months of July 2009 with 524 attractions providing comparable visits figures.

**2.0 July 2009/2008**
**Summary**

The total number of visits for the responding 524 barometer attractions in Scotland for the period July 2009 was 4,727,593. When compared to data from the previous year of 4,501,393 visits, this shows a visits increase of 5.0%. The total number of visits for responding attractions for January-July 2009 was 21,431,687, when compared to data from the previous year of 20,875,768 this shows a visits increase of 2.7%.

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

Attractions	July-09	July-08	%Change	Jan-Jul-09	Jan-Jul-08	%Change
524	4,727,593	4,501,393	5.0	21,431,687	20,875,768	2.7

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

Attractions	Months		Months	Visits	%Change
	Months	Visits			
524	Jan-09	1,562,129	Jan-08	1,592,502	-1.9
	Feb-09	1,875,856	Feb-08	1,965,915	-4.6
	Mar-09	2,363,766	Mar-08	2,583,141	-8.5
	Apr-09	3,540,853	Apr-08	3,077,687	15.0
	May-09	3,518,126	May-08	3,541,937	-0.7
	Jun-09	3,843,364	Jun-08	3,613,193	6.4
	Jul-09	4,727,593	Jul-08	4,501,393	5.0

The greatest percentage increases in visits recorded by former VisitScotland Areas for July 2009 were experienced by attractions in the Outer Hebrides (12.7%), Highlands of Scotland (11.3%) and Edinburgh & Lothian (10.1%). Ayrshire & Arran experienced the greatest decline in visits with decreases of -4.7%. Argyll, Loch Lomond & Forth Valley and Shetland Islands also experienced small decreases of -2.6% and -1.8% respectively, over the same period.

The greatest percentage increase in visits was recorded by the Industrial/ Craft Premises category (19.9%) and by Church/ Abbey/ Cathedral sites (13.7%). Decreases were experienced by both Garden sites (-6.3%) and Historic House/ Palace sites (-1.1%) when comparing July 2009 with July 2008.

Attractions in all locations experienced percentage increases in visits, with Seaside located attractions experiencing increases of 11.8%, followed by Urban (6.4%) and Rural (1.7%) attractions. Attractions of all sizes experienced increases in visits numbers comparing July 2009 with July 2008, with those welcoming between 1 and 19,999 experiencing the greatest increases at 5.7%. Free and Paid admission attractions experienced increases, of 5.6% and 4.1% respectively.

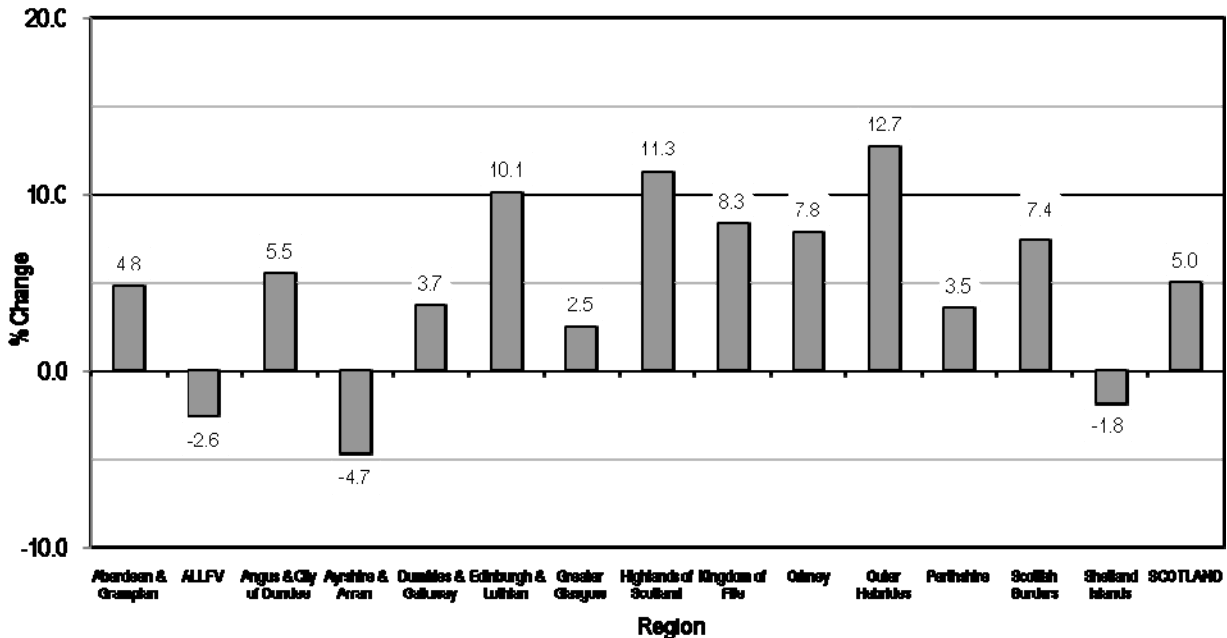
The greatest percentage increases in visits by former LEC area were experienced by attractions in Renfrewshire (17%), Skye & Wester Ross (15.4%) and Inverness & East Highland (14.1%). Dunbartonshire experienced the greatest decrease of -7.2% followed by Forth Valley (-3.9%) and Ayrshire (-3.4%) when comparing July 2009 with July 2008.

**3.0 PERFORMANCE BY FORMER VISITSCOTLAND AREA**  
 Performance by Former VisitScotland Area – July 2009/2008 and January-July 2009/2008

Area	July-09	July-08	%Change	Jan-Jul-09	Jan-Jul-08	%Change
Aberdeen & Grampian (67)	255,596	243,962	4.8	1,008,703	977,976	3.1
ALLFV (62)	371,282	381,069	-2.6	1,351,787	1,431,621	-5.6
Angus & City of Dundee (27)	158,867	150,595	5.5	673,885	636,867	5.8
Ayrshire & Arran (20)	168,349	176,660	-4.7	780,910	766,431	1.9
Dumfries & Galloway (34)	89,637	86,462	3.7	313,440	300,593	4.3
Edinburgh & Lothian (67)	1,092,262	992,104	10.1	4,788,249	4,639,741	3.2
Greater Glasgow (64)	1,649,719	1,609,807	2.5	9,448,712	9,231,350	2.4
Highlands of Scotland (65)	537,819	483,295	11.3	1,718,832	1,583,639	8.5
Kingdom of Fife (27)	93,229	86,048	8.3	334,498	321,707	4.0
Orkney (20)	105,291	97,639	7.8	271,311	272,634	-0.5
Outer Hebrides (8)	47,918	42,517	12.7	176,419	160,858	9.7
Perthshire (18)	61,771	59,676	3.5	212,528	223,238	-4.8
Scottish Borders (29)	69,275	64,482	7.4	265,086	236,496	12.1
Shetland Islands (16)	26,578	27,077	-1.8	87,327	92,617	-5.7
<b>SCOTLAND (524)</b>	<b>4,727,593</b>	<b>4,501,393</b>	<b>5.0</b>	<b>21,431,687</b>	<b>20,875,768</b>	<b>2.7</b>

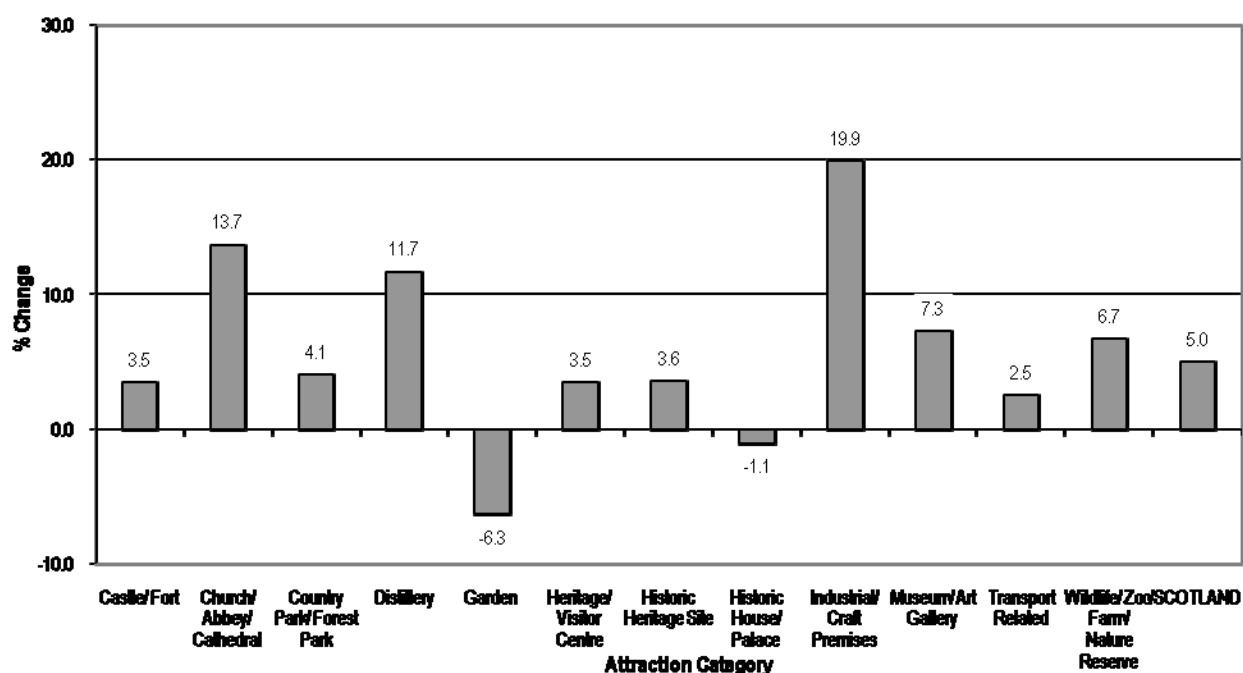
Note: Number in brackets indicates the number of visitor attractions per region.

**Performance by VisitScotland Area July 2009/2008**



**4.0 PERFORMANCE BY ATTRACTION CATEGORY**  
 Performance by Attraction Category – July 2009/2008 and January-July 2009/2008

Category	July-09	July-08	% Change	Jan-Jul-09	Jan-Jul-08	% Change
Castle/ Fort (59)	616,716	595,874	3.5	2,010,234	1,992,923	0.9
Church/ Abbey/ Cathedral (21)	229,151	201,549	13.7	802,300	732,349	9.6
Country Park / Forest Park (14)	1,189,834	1,143,099	4.1	7,100,373	6,770,993	4.9
Distillery (25)	94,368	84,484	11.7	305,881	288,629	6.0
Garden (26)	114,347	122,075	-6.3	540,573	527,470	2.5
Heritage/ Visitor Centre (85)	671,379	648,946	3.5	2,754,430	2,750,691	0.1
Historic Heritage Site (37)	128,863	124,366	3.6	378,366	374,106	1.1
Historic House/ Palace (37)	98,553	99,628	-1.1	336,933	330,394	2.0
Industrial/ Craft Premises (13)	21,928	18,282	19.9	80,616	81,065	-0.6
Museum/ Art Gallery (173)	1,180,837	1,100,685	7.3	5,639,288	5,608,440	0.6
Transport Related (11)	126,324	123,231	2.5	583,141	567,882	2.7
Wildlife/ Zoo/ Farm/ Nature Reserve (23)	255,293	239,174	6.7	899,552	850,826	5.7
<b>SCOTLAND (524)</b>	<b>4,727,593</b>	<b>4,501,393</b>	<b>5.0</b>	<b>21,431,687</b>	<b>20,875,768</b>	<b>2.7</b>

**Performance by Attraction Category July 2009/2008**

**5.0 PERFORMANCE BY LOCATION**

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

Location	July-09	July-08	% Change	Jan-Jul-09	Jan-Jul-08	%Change
Rural (232)	1,748,144	1,718,293	1.7	8,056,976	7,888,642	2.1
Seaside (69)	367,072	328,379	11.8	1,200,344	1,140,768	5.2
Urban (223)	2,612,377	2,454,721	6.4	12,174,367	11,846,358	2.8
<b>SCOTLAND (524)</b>	<b>4,727,593</b>	<b>4,501,393</b>	<b>5.0</b>	<b>21,431,687</b>	<b>20,875,768</b>	<b>2.7</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 – July 2009/2008 and January-July 2009/2008

Volume of Visits	July-09	July-08	% Change	Jan-Jul-09	Jan-Jul-08	%Change
1 - 19,999 (319)	450,007	425,848	5.7	1,436,823	1,362,310	5.5
20,000 - 49,999 (87)	454,813	435,841	4.4	1,689,822	1,642,986	2.9
50,000 + (118)	3,822,773	3,639,704	5.0	18,305,042	17,870,472	2.4
<b>SCOTLAND (524)</b>	<b>4,727,593</b>	<b>4,501,393</b>	<b>5.0</b>	<b>21,431,687</b>	<b>20,875,768</b>	<b>2.7</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 – July 2009/2008 and January-July 2009/2008

Admission Type	July-09	July-08	% Change	Jan-Jul-09	Jan-Jul-08	%Change
Free (222)	2,941,068	2,785,608	5.6	14,920,393	14,516,115	2.8
Paid (302)	1,786,525	1,715,785	4.1	6,511,294	6,359,653	2.4
<b>SCOTLAND (524)</b>	<b>4,727,593</b>	<b>4,501,393</b>	<b>5.0</b>	<b>21,431,687</b>	<b>20,875,768</b>	<b>2.7</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 – July 2009/2008 and January-July 2009/2008

LEC	July-09	July-08	%Change	Jan-Jul-09	Jan-Jul-08	%Change
Argyll & The Islands (31)	121,568	120,372	1.0	394,479	387,290	1.9
Ayrshire (19)	163,844	169,518	-3.4	766,977	747,698	2.6
Borders (29)	69,275	64,482	7.4	265,086	236,496	12.1
Caithness & Sutherland (14)	52,310	53,134	-1.6	166,389	166,839	-0.3
Dumfries & Galloway (33)	89,295	86,120	3.7	312,001	299,444	4.2
Dunbartonshire (9)	107,862	116,178	-7.2	582,299	639,803	-9.0
Edinburgh & Lothians (67)	1,092,262	992,104	10.1	4,788,249	4,639,741	3.2
Fife (27)	93,229	86,048	8.4	334,498	321,707	4.0
Forth Valley (29)	283,389	294,833	-3.9	1,038,998	1,110,539	-6.4
Glasgow (32)	471,466	471,259	0.0	2,528,202	2,559,196	-1.2
Grampian (53)	207,385	201,538	2.9	856,757	836,997	2.4
Inverness & East Highland (28)	256,996	225,314	14.1	852,283	777,010	9.7
Lanarkshire (18)	969,629	935,751	3.6	5,919,258	5,653,489	4.7
Lochaber (7)	48,365	46,703	3.6	184,812	163,127	13.3
Moray (16)	52,854	47,209	12.0	164,702	154,756	6.4
Orkney (20)	105,291	97,639	7.8	271,311	272,634	-0.5
Renfrewshire (10)	72,427	61,900	17.0	356,043	336,472	5.8
Shetland (16)	26,578	27,077	-1.8	87,327	92,617	-5.7
Skye & Wester Ross (13)	169,425	146,760	15.4	480,113	439,566	9.2
Tayside (45)	226,225	214,937	5.3	905,484	879,489	3.0
Western Isles (8)	47,918	42,517	12.7	176,419	160,858	9.7
<b>SCOTLAND (524)</b>	<b>4,727,593</b>	<b>4,501,393</b>	<b>5.0</b>	<b>21,431,687</b>	<b>20,875,768</b>	<b>2.7</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 July 2009.

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

Homecoming 2009  
Increase in UK visitors  
More coaches  
Inclement weather better for indoor attractions  
Clan gatherings

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

Wet weather  
Fuel costs  
Local competition