

**2008 SCOTTISH VISITOR ATTRACTION BAROMETER
August 2008 REPORT**

Commissioned by VisitScotland

 Conducted by the Moffat Centre for Travel and Tourism
 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).

This Barometer compares the period of August 2008 with August 2007. Some 545 attraction operators provided figures for the month of August 2008 with 524 attractions providing comparable visits figures.

2.0 August 2008/2007
Summary

The total number of visits for the responding 524 barometer attractions in Scotland for the month of August 2008 was **4,468,229**. When compared to data from the previous year of **4,804,003** visits, this shows a visits decrease of **-7.0%**. The total number of visits for responding attractions for the period January- August 2008 was **24,153,327** when compared to data from the previous year of **24,926,845** this shows a visits decrease of **-3.1%**.

*The re-opening of Kelvingrove Museum and Art Gallery in July 2006 continues to have an effect in shaping performance for 2008.

The following table shows total visits recorded for August 2008/2007 and January-August 2008/2007 as well as the % change calculation. Figures have been adjusted in the table below to show findings that exclude Kelvingrove Museum and Art Gallery visits

Attractions	Aug-08	Aug-07	%Change	Jan-Aug-08	Jan-Aug-07	%Change
524	4,468,229	4,804,003	-7.0	24,153,327	24,926,845	-3.1
*523 (excl. Kelvingrove)	4,310,481	4,580,940	-5.9	23,101,115	23,221,084	-0.5

A further breakdown is shown below, where the visits during the individual months of January-August 2008 can be compared with January-August 2007 with their % change calculations.

Attractions	Months	Visits	Months	Visits	%Change
524	Jan-08	1,491,860	Jan-07	1,565,231	-4.7
	Feb-08	1,833,300	Feb-07	1,793,700	2.2
	Mar-08	2,362,734	Mar-07	1,971,487	19.8
	Apr-08	2,887,553	Apr-07	3,365,261	-14.2
	May-08	3,375,592	May-07	3,373,116	0.1
	Jun-08	3,468,590	Jun-07	3,406,773	1.8
	Jul-08	4,265,469	Jul-07	4,647,274	-8.2
	Aug-08	4,468,229	Aug-07	4,804,003	-7.0

The greatest percentage increase in visits recorded by VisitScotland Area for August 2008 was experienced by Angus & City of Dundee (9.8%) followed by Outer Hebrides (6.4%). Ayrshire & Arran experienced the greatest percentage decrease in visits figures over the same period of -11.9%, followed by Aberdeen & Grampian (-11.8%); Greater Glasgow (-11.3%) and Scottish Borders (-11.0%).

During this period the greatest percentage increase in visits of 2% was recorded by the Church/ Abbey/ Cathedral category and the Transport Related category. The Castle/ Fort sector experienced the greatest percentage decrease in visits of -14.0%, followed by the Historic Heritage Site category (-10.6%) and Distillery sites (-10.2%) when comparing August 2008 with August 2007.

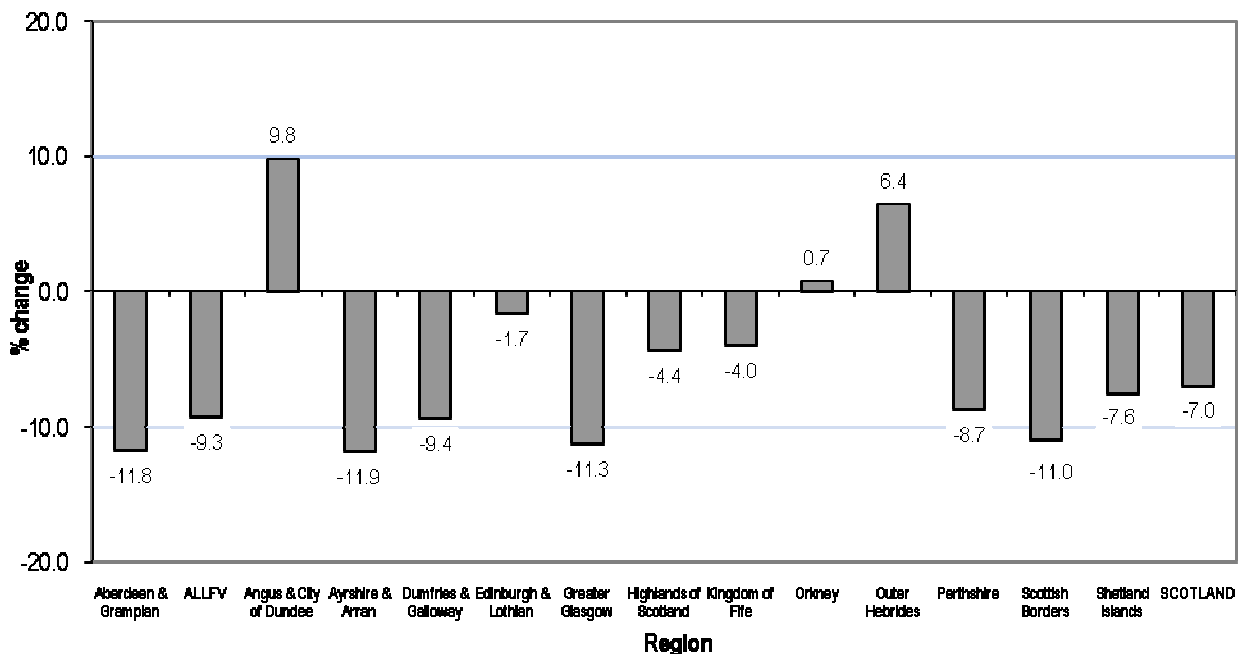
Attractions in all locations experienced percentage decreases, with Urban and Seaside located attractions experiencing the greatest decreases of -8.2% and -6.4% respectively. Attractions welcoming between 1 and 19,999 visits experienced the greatest decreases of -10.5%, whilst those attracting more than 50,000 and between 20,000 and 49,999 experienced decreases of -6.8% and -4.6% respectively.

Both Paid and Free admission attractions experienced decreases of -8.9% and -5.8% respectively. The greatest percentage increases in visits by former LEC area were experienced by attractions in Dunbartonshire (20.0%) and Western Isles (6.4%). Attractions in Renfrewshire experienced the greatest decrease of -20.0% followed by those located in Glasgow and Forth Valley who experienced decreases of -19.5% and -14.1% respectively when comparing August 2008 with August 2007.

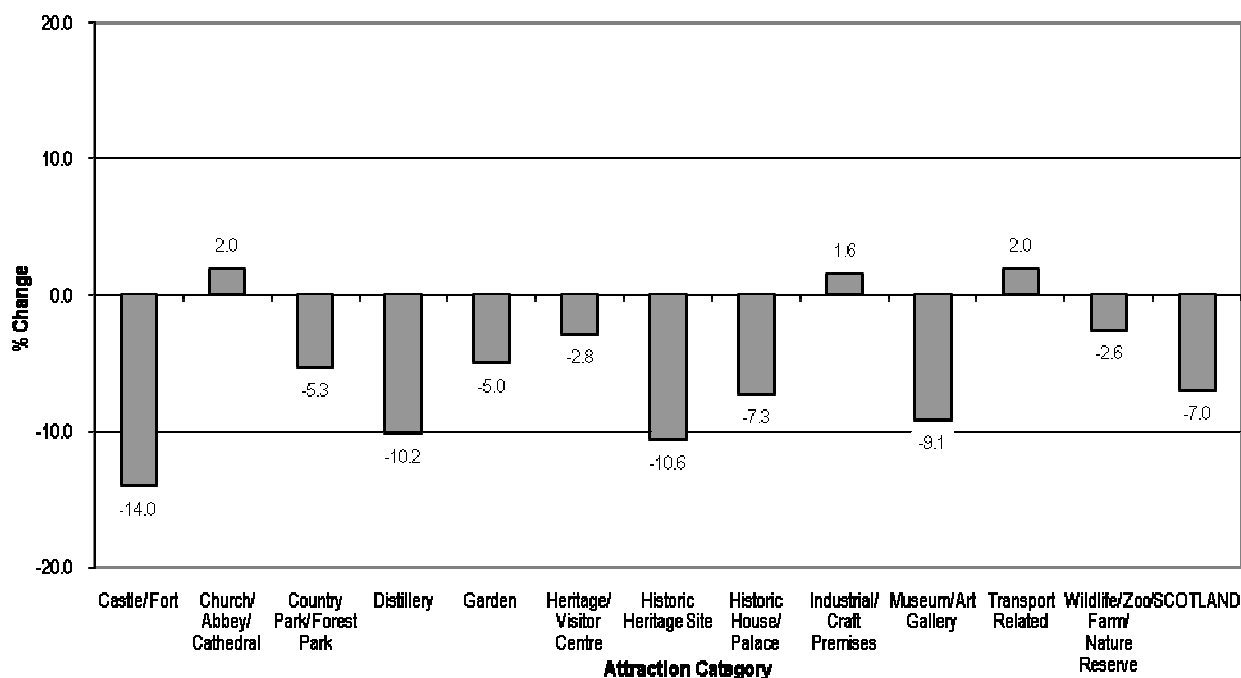
3.0 PERFORMANCE BY VISITSCOTLAND AREA
Performance by VisitScotland Area – August 2008/2007 and January-August 2008/2007

Area	Aug-08	Aug-07	%Change	Jan-Aug-08	Jan-Aug-07	%Change
Aberdeen & Grampian (63)	213,415	241,923	-11.8	1,092,765	1,152,433	-5.2
ALLFV (62)	414,065	456,623	-9.3	1,828,541	1,891,282	-3.3
Angus & City of Dundee (28)	180,252	164,176	9.8	959,750	919,339	4.4
Ayrshire & Arran (18)	139,996	158,819	-11.9	819,223	848,144	-3.4
Dumfries & Galloway (36)	86,621	95,607	-9.4	360,389	383,540	-6.0
Edinburgh & Lothian (62)	999,946	1,016,732	-1.7	4,581,518	4,472,154	2.4
Greater Glasgow (66)	1,499,699	1,690,708	-11.3	10,848,608	11,605,271	-6.5
Highlands of Scotland (61)	467,546	489,003	-4.4	1,703,085	1,709,457	-0.4
Kingdom of Fife (27)	90,075	93,835	-4.0	403,008	418,392	-3.7
Orkney (21)	116,982	116,113	0.7	395,176	357,697	10.5
Outer Hebrides (7)	36,529	34,322	6.4	192,433	195,366	-1.5
Perthshire (21)	127,420	139,626	-8.7	513,935	530,256	-3.1
Scottish Borders (34)	71,979	80,860	-11.0	336,342	349,156	-3.7
Shetland Islands (18)	23,704	25,656	-7.6	118,554	94,358	25.6
SCOTLAND (524)	4,468,229	4,804,003	-7.0	24,153,327	24,926,845	-3.1

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

Performance by VisitScotland Area Aug 2008/2007

4.0 PERFORMANCE BY ATTRACTION CATEGORY
Performance by Attraction Category – August 2008/2007 and January-August 2008/2007

Category	Aug-08	Aug-07	% Change	Jan-Aug-08	Jan-Aug-07	% Change
Castle/ Fort (58)	649,027	754,805	-14.0	2,613,833	2,878,538	-9.2
Church/ Abbey/ Cathedral (17)	218,444	214,240	2.0	886,922	811,772	9.3
Country Park / Forest Park (16)	1,024,899	1,081,975	-5.3	7,886,033	7,876,932	0.1
Distillery (24)	103,906	115,646	-10.2	382,366	403,894	-5.3
Garden (26)	116,002	122,076	-5.0	637,469	647,802	-1.6
Heritage/ Visitor Centre (89)	623,367	641,480	-2.8	3,038,252	2,991,296	1.6
Historic Heritage Site (40)	137,929	154,314	-10.6	505,021	548,360	-7.9
Historic House/ Palace (40)	127,291	137,254	-7.3	526,388	560,512	-6.1
Industrial/ Craft Premises (10)	8,743	8,606	1.6	34,869	33,751	3.3
Museum/ Art Gallery (172)	1,120,209	1,233,027	-9.1	5,988,099	6,623,155	-9.6
Transport Related (10)	148,503	145,658	2.0	659,209	594,731	10.8
Wildlife/ Zoo/ Farm/ Nature Reserve (22)	189,909	194,922	-2.6	994,866	956,102	4.1
SCOTLAND (524)	4,468,229	4,804,003	-7.0	24,153,327	24,926,845	-3.1

Performance by Attraction Category Aug 2008/2007

5.0 PERFORMANCE BY LOCATION
Performance by Location – August 2008/2007 and January-August 2008/2007

Location	Aug-08	Aug-07	% Change	Jan-Aug-08	Jan-Aug-07	%Change
Rural (237)	1,751,590	1,849,826	-5.3	9,654,488	9,721,628	-0.7
Seaside (66)	286,811	306,392	-6.4	1,185,718	1,220,862	-2.9
Urban (221)	2,429,828	2,647,785	-8.2	13,313,121	13,984,355	-4.8
SCOTLAND (524)	4,468,229	4,804,003	-7.0	24,153,327	24,926,845	-3.1

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

6.0 PERFORMANCE BY VOLUME OF VISITS
Performance by Volume of Visits – August 2008/2007 and January-August 2008/2007

Range of Volume of Visits	Aug-08	Aug-07	% Change	Jan-Aug-08	Jan-Aug-07	%Change
1 - 19,999 (331)	444,230	496,491	-10.5	1,795,895	1,847,538	-2.8
20,000 - 49,999 (78)	402,212	421,766	-4.6	1,747,972	1,747,819	0.0
50,000 + (115)	3,621,787	3,885,746	-6.8	20,609,460	21,331,488	-3.4
SCOTLAND (524)	4,468,229	4,804,003	-7.0	24,153,327	24,926,845	-3.1

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 – August 2008/2007 and January-August 2008/2007

Admission	Aug-08	Aug-07	% Change	Jan-Aug-08	Jan-Aug-07	%Change
Free (226)	2,765,232	2,934,200	-5.8	16,597,045	17,086,783	-2.9
Paid (298)	1,702,997	1,869,803	-8.9	7,556,282	7,840,062	-3.6
SCOTLAND (524)	4,468,229	4,804,003	-7.0	24,153,327	24,926,845	-3.1

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 – August 2008/2007 and January-August 2008/2007

LEC	Aug-08	Aug-07	%Change	Jan-Aug-08	Jan-Aug-07	%Change
Argyll & The Islands (30)	126,313	143,817	-12.2	488,146	511,291	-4.5
Ayrshire (17)	132,375	150,695	-12.2	792,869	820,326	-3.3
Borders (34)	71,979	80,860	-11.0	336,342	349,156	-3.7
Caithness & Sutherland (13)	26,184	28,501	-8.1	84,063	82,933	1.4
Dumfries & Galloway (35)	86,203	95,332	-9.6	358,822	381,669	-6.0
Dunbartonshire (11)	149,634	124,685	20.0	861,139	612,291	40.6
Edinburgh & Lothians (62)	999,946	1,016,732	-1.7	4,581,518	4,472,154	2.4
Fife (27)	90,075	93,835	-4.0	403,008	418,392	-3.7
Forth Valley (27)	290,725	338,630	-14.1	1,329,508	1,477,835	-10.0
Glasgow (28)	465,077	577,630	-19.5	3,045,656	3,790,131	-19.6
Grampian (53)	174,861	195,792	-10.7	959,954	1,002,477	-4.2
Inverness & East Highland (23)	249,081	254,045	-2.0	962,045	953,348	0.9
Lanarkshire (21)	823,450	887,425	-7.2	6,520,576	6,615,736	-1.4
Lochaber (10)	56,392	58,778	-4.1	220,729	217,629	1.4
Moray (12)	44,455	50,772	-12.4	152,499	170,420	-10.5
Orkney (21)	116,982	116,113	0.7	395,176	357,697	10.5
Renfrewshire (13)	65,215	81,503	-20.0	454,001	506,701	-10.4
Shetland (18)	23,704	25,656	-7.6	118,554	94,358	25.6
Skye & Wester Ross (12)	123,228	135,523	-9.1	386,490	410,189	-5.8
Tayside (50)	315,821	313,357	0.8	1,509,799	1,486,746	1.6
Western Isles (7)	36,529	34,322	6.4	192,433	195,366	-1.5
SCOTLAND (524)	4,468,229	4,804,003	-7.0	24,153,327	24,926,845	-3.1

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 August 2008.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Cruise liners increased visitor figures	High fuel costs
Increase in school visits	Economic downturn
Better weather	Few coaches
	Attraction refurbishment
	Roadworks

*The re-opening of Kelvingrove Museum and Art Gallery in July 2006 continues to impact on overall performance for August 2008.