

**2008 SCOTTISH VISITOR ATTRACTION BAROMETER
July 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 July 2008 with July 2007. Some 547 attraction operators provided figures for the month of July 2008 with 526 attractions providing comparable visits figures.

2.0 July 2008/2007
Summary

The total number of visits for the responding 526 barometer attractions in Scotland for the month of July 2008 was **4,298,879**. When compared to data from the previous year of **4,703,714** visits, this shows a visits decrease of **-8.6%**. The total number of visits for responding attractions for the period January- July 2008 was **19,832,760** when compared to data from the previous year of **20,428,973** this shows a visits decrease of **-2.9%**.

*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 July 2008/2007 and January-July 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	Jul-08	Jul-07	%Change	Jan-Jul-08	Jan-Jul-07	%Change
526	4,298,879	4,703,714	-8.6	19,832,760	20,428,973	-2.9
*526 (excl. Kelvingrove)	4,140,372	4,452,141	-7.0	18,938,296	18,946,275	0.0

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

Attractions	Months	Visits	Months	Visits	%Change
526	Jan-08	1,513,884	Jan-07	1,606,445	-5.8
	Feb-08	1,860,912	Feb-07	1,846,617	0.8
	Mar-08	2,387,241	Mar-07	2,003,704	19.1
	Apr-08	2,923,526	Apr-07	3,408,055	-14.2
	May-08	3,373,590	May-07	3,407,183	-1.0
	Jun-08	3,474,728	Jun-07	3,453,255	0.6
	Jul-08	4,298,879	Jul-07	4,703,714	-8.6

The greatest percentage increase in visits recorded by VisitScotland Area for July 2008 was experienced by the Outer Hebrides (7.0%) followed by Scottish Borders (3.5%). Ayrshire & Arran experienced the greatest percentage decrease in visits figures over the same period of -14.0%, followed by Greater Glasgow and Orkney with decreases in visits figures of -13.7% and -12.6% respectively.

During this period the greatest percentage increase in visits was recorded by the Industrial/ Craft Premises category (10.9%) followed by Wildlife/ Zoo/ Farm/ Nature Reserve sites (10.8%). The Historic House/ Palace sector experienced a decline in visits of -13.5%, followed by the Castle/ Fort category with a decline of -13.2% when comparing July 2008 with July 2007.

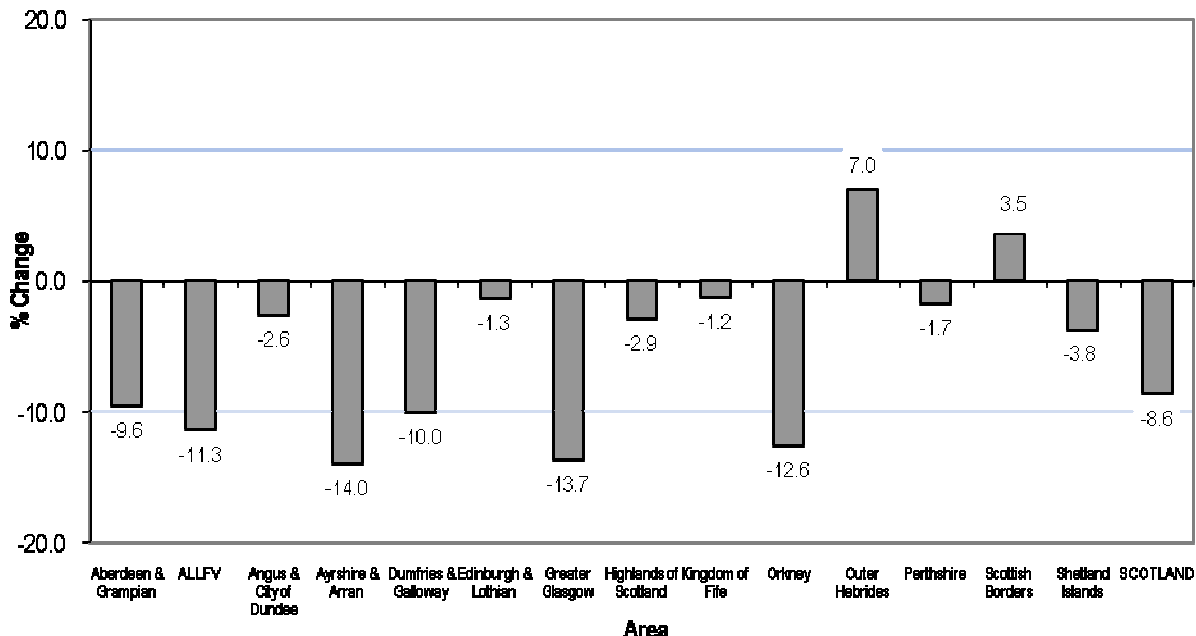
Attractions in all locations experienced percentage decreases, with Rural and Urban located attractions experiencing the greatest decreases of -9.8% and -8.3% respectively. Attractions welcoming more than 50,000 visits experienced the greatest decreases of -9.4%, whilst those attracting between 20,000 and 49,999 and between 1 and 19,999 experienced decreases of -5.3% and -4.3% respectively.

Both Free and Paid admission attractions experienced decreases of -9.9% and -6.6% respectively. The greatest percentage increases in visits by former LEC area were experienced by attractions in Dunbartonshire (70.3%) and Western Isles (7.0%). Attractions in Glasgow experienced the greatest decrease of -19.5% followed by those located in Lanarkshire and Ayrshire who experienced decreases of -14.8% and -14.2% respectively when comparing July 2008 with June 2007.

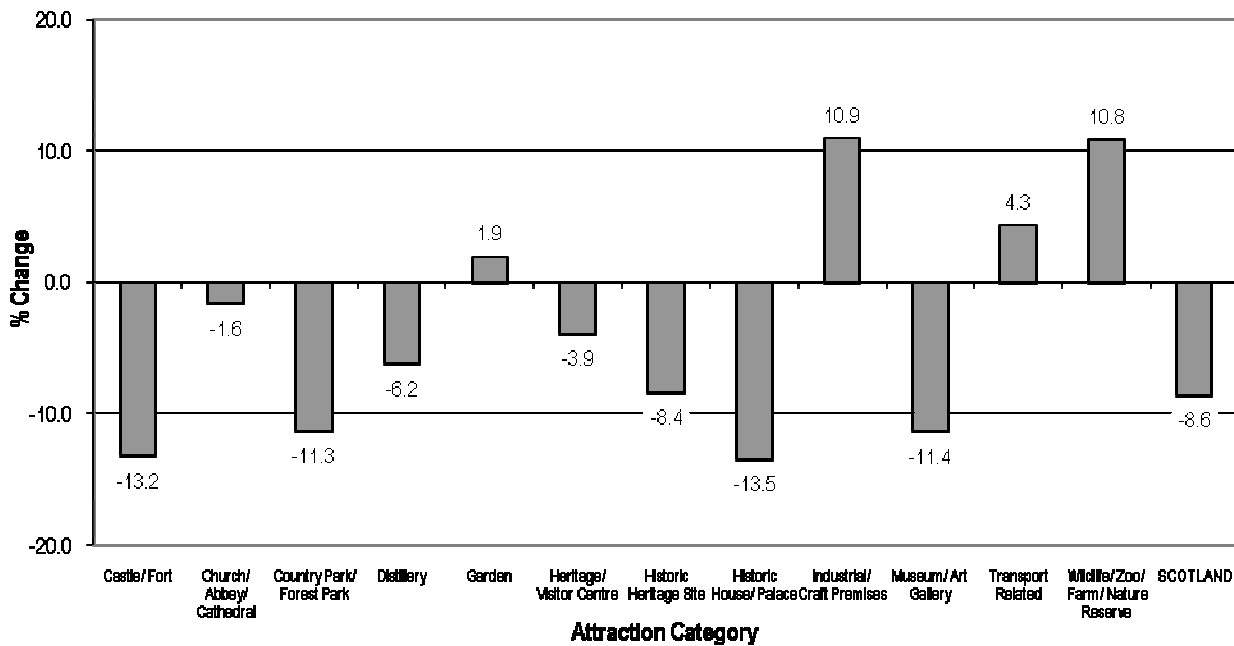
3.0 PERFORMANCE BY VISITSCOTLAND AREA
Performance by VisitScotland Area – July 2008/2007 and January-July 2008/2007

Area	Jul-08	Jul-07	%Change	Jan-Jul-08	Jan-Jul-07	%Change
Aberdeen & Grampian (67)	218,094	241,147	-9.6	910,720	946,412	-3.8
ALLFV (59)	306,490	345,693	-11.3	1,128,443	1,240,868	-9.1
Angus & City of Dundee (28)	172,331	176,877	-2.6	779,498	755,163	3.2
Ayrshire & Arran (17)	147,999	172,028	-14.0	629,812	643,626	-2.1
Dumfries & Galloway (34)	72,398	80,446	-10.0	272,548	286,686	-4.9
Edinburgh & Lothian (62)	842,876	854,012	-1.3	3,744,651	3,633,528	3.1
Greater Glasgow (68)	1,726,406	1,999,439	-13.7	9,661,318	10,223,091	-5.5
Highlands of Scotland (65)	398,723	410,546	-2.9	1,272,237	1,257,748	1.2
Kingdom of Fife (27)	88,216	89,315	-1.2	312,933	324,557	-3.6
Orkney (19)	76,317	87,311	-12.6	206,630	215,157	-4.0
Outer Hebrides (7)	40,910	38,224	7.0	155,904	161,044	-3.2
Perthshire (21)	107,751	109,651	-1.7	399,095	404,606	-1.4
Scottish Borders (34)	72,168	69,713	3.5	264,121	267,785	-1.4
Shetland Islands (18)	28,200	29,312	-3.8	94,850	68,702	38.1
SCOTLAND (526)	4,298,879	4,703,714	-8.6	19,832,760	20,428,973	-2.9

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

Performance by VisitScotland Area July 2008/2007

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

Category	Jul-08	Jul-07	% Change	Jan-Jul-08	Jan-Jul-07	% Change
Castle/ Fort (60)	579,466	667,811	-13.2	1,981,476	2,142,562	-7.5
Church/ Abbey/ Cathedral (15)	157,242	159,850	-1.6	593,156	569,657	4.1
Country Park/ Forest Park (16)	1,178,330	1,329,142	-11.3	6,861,134	6,794,957	1.0
Distillery (26)	85,604	91,259	-6.2	304,116	313,721	-3.1
Garden (26)	119,613	117,355	1.9	513,217	517,226	-0.8
Heritage/ Visitor Centre (86)	511,238	532,029	-3.9	2,099,205	2,132,370	-1.6
Historic Heritage Site (40)	119,849	130,810	-8.4	367,092	394,046	-6.8
Historic House/ Palace (39)	121,045	139,897	-13.5	392,396	415,914	-5.7
Industrial/ Craft Premises (10)	8,475	7,642	10.9	26,126	25,145	3.9
Museum/ Art Gallery (175)	1,068,775	1,205,840	-11.4	5,322,290	5,853,468	-9.1
Transport Related (11)	123,749	118,605	4.3	567,595	508,727	11.6
Wildlife/ Zoo/ Farm/ Nature Reserve (22)	225,493	203,474	10.8	804,957	761,180	5.8
SCOTLAND (526)	4,298,879	4,703,714	-8.6	19,832,760	20,428,973	-2.9

Performance by Attraction Category July 2008/2007

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

Location	Jul-08	Jul-07	% Change	Jan-Jul-08	Jan-Jul-07	%Change
Rural (238)	1,661,035	1,841,145	-9.8	7,756,592	7,768,052	-0.2
Seaside (66)	264,422	273,125	-3.2	901,589	911,986	-1.1
Urban (222)	2,373,422	2,589,444	-8.3	11,174,579	11,748,935	-4.9
SCOTLAND (526)	4,298,879	4,703,714	-8.6	19,832,760	20,428,973	-2.9

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 2008/2007 and January-July 2008/2007

Range of Volume of Visits	Jul-08	Jul-07	% Change	Jan-Jul-08	Jan-Jul-07	%Change
1 - 19,999 (329)	401,534	419,719	-4.3	1,267,652	1,307,038	-3.0
20,000 - 49,999 (83)	377,576	398,405	-5.2	1,412,969	1,391,397	1.6
50,000 + (114)	3,519,769	3,885,590	-9.4	17,152,139	17,730,538	-3.3
SCOTLAND (526)	4,298,879	4,703,714	-8.6	19,832,760	20,428,973	-2.9

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 2008/2007 and January-July 2008/2007

Admission	Jul-08	Jul-07	% Change	Jan-Jul-08	Jan-Jul-07	%Change
Free (223)	2,581,801	2,865,654	-9.9	13,444,665	13,880,611	-3.1
Paid (303)	1,717,078	1,838,060	-6.6	6,388,095	6,548,362	-2.4
SCOTLAND (526)	4,298,879	4,703,714	-8.6	19,832,760	20,428,973	-2.9

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 2008/2007 and January-July 2008/2007

LEC	Jul-08	Jul-07	%Change	Jan-Jul-08	Jan-Jul-07	%Change
Argyll & The Islands (30)	117,701	117,401	0.3	370,143	371,998	-0.5
Ayrshire (16)	140,857	164,235	-14.2	611,079	623,932	-2.1
Borders (34)	72,168	69,713	3.5	264,121	267,785	-1.4
Caithness & Sutherland (14)	29,162	29,020	0.5	74,073	71,006	4.3
Dumfries & Galloway (33)	72,056	79,862	-9.8	271,399	285,090	-4.8
Dunbartonshire (7)	69,225	40,638	70.3	410,266	281,621	45.7
Edinburgh & Lothians (62)	842,876	854,012	-1.3	3,744,651	3,633,528	3.1
Fife (27)	88,216	89,315	-1.2	312,933	324,557	-3.6
Forth Valley (27)	265,995	300,891	-11.6	1,038,783	1,139,205	-8.8
Glasgow (32)	558,497	693,691	-19.5	2,921,391	3,569,886	-18.2
Grampian (54)	182,275	202,008	-9.8	801,911	834,361	-3.9
Inverness & East Highland (26)	211,604	215,412	-1.8	733,468	720,023	1.9
Lanarkshire (21)	962,459	1,129,776	-14.8	5,697,126	5,728,311	-0.5
Lochaber (10)	48,343	49,619	-2.6	164,337	158,851	3.5
Moray (15)	40,604	43,728	-7.1	122,596	127,874	-4.1
Orkney (19)	76,317	87,311	-12.6	206,630	215,157	-4.0
Renfrewshire (12)	65,724	68,605	-4.2	367,279	384,011	-4.4
Shetland (18)	28,200	29,312	-3.8	94,850	68,702	38.1
Skye & Wester Ross (12)	98,230	105,900	-7.2	263,262	274,666	-4.2
Tayside (50)	287,460	295,041	-2.6	1,206,558	1,187,365	1.6
Western Isles (7)	40,910	38,224	7.0	155,904	161,044	-3.2
SCOTLAND (526)	4,298,879	4,703,714	-8.6	19,832,760	20,428,973	-2.9

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 2008.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Improved signage	High fuel costs
Cruise ship visitors	Economic downturn
Better weather	Poor exchange rates
Word of mouth recommendation	Few coaches
	Attraction refurbishment
	Fewer US visitors

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