

2008 SCOTTISH VISITOR ATTRACTION BAROMETER June 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 June 2008 with June 2007. Some 545 attraction operators provided figures for the month of June 2008 with 521 attractions providing comparable visits figures.

2.0 June 2008/2007

Summary

The total number of visits for the responding 521 barometer attractions in Scotland for the month of June 2008 was 3,368,727. When compared to data from the previous year of 3,336,597 visits, this shows a visits increase of 1.0%. The total number of visits for responding attractions for the period January-June 2008 was 15,017,816 when compared to data from the previous year of 15,216,326 this shows a visits decrease of -1.3%.

*The re-opening of Kelvingrove Museum and Art Gallery in July 2006 continues to have a significant effect in shaping performance for the first part of 2008.

The following table shows total visits recorded for June 2008/2007 and January-June 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	Jun-08	Jun-07		Jan-Jun08	Jan-Jun07	%Change
521	3,368,727	3,336,597	1.0	15,017,816	15,216,326	-1.3
*520 (excl. Kelvingrove)	3,345,407	3,310,427	1.1	14,892,378	15,075,061	-1.2

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

Attractions	Months	Visits	Months	Visits	%Change
521	Jan-08	1,449,019	Jan-07	1,558,414	-7.0
	Feb-08	1,795,409	Feb-07	1,781,000	0.8
	Mar-08	2,318,883	Mar-07	1,947,884	19.0
	Apr-08	2,816,263	Apr-07	3,291,169	-14.4
	May-08	3,269,515	May-07	3,301,262	-1.0
	Jun-08	3,368,727	Jun-07	3,336,597	1.0

The greatest percentage increase in visits recorded by VisitScotland Area for June 2008 was experienced by Orkney (24.7%) followed by Outer Hebrides (5.0%) and Greater Glasgow (4.6%). Dumfries & Galloway experienced the greatest percentage decrease in visits figures over the same period of -13.3%, followed by Argyll, Loch Lomond and Forth Valley (ALLFV) and Shetland Islands with decreases in visits figures of -12.3% and -10.4% respectively.

During this period the greatest percentage increase in visits was recorded by the Country Park / Forest Park category (17.0%) followed by Church/ Abbey/ Cathedral sites (14.5%). The Museum/ Art Gallery sector experienced a decline in visits of -11.5%, followed by the Castle/ Fort category with a decline of -11.0% when comparing June 2008 with June 2007.

Attractions in Rural locations experienced an increase in visits of 8.1%, whilst those located in Seaside and Urban locations experienced decreases of -5.4% and -3.8% respectively. Attractions welcoming between 20,000 and 49,999 visits experienced the greatest increase in visits of 7.26%, with those attracting over 50,000 visits experiencing increases of 0.9%. Only those attractions welcoming between 1 and 19,999 visits experienced a decrease in visits of -3.9%.

Free admission attractions experienced an increase of 3.5%, whilst Paid admission attractions experienced decreases of -3.8%. The greatest percentage increases in visits by former LEC area were experienced by attractions in Dunbartonshire (39.1%) and Orkney (24.7%). Attractions in Glasgow experienced the greatest decrease of -17.4% followed by those located in Forth Valley and Dumfries & Galloway who experienced decreases of -14.9% and -13.4% respectively when comparing June 2008 with June 2007.

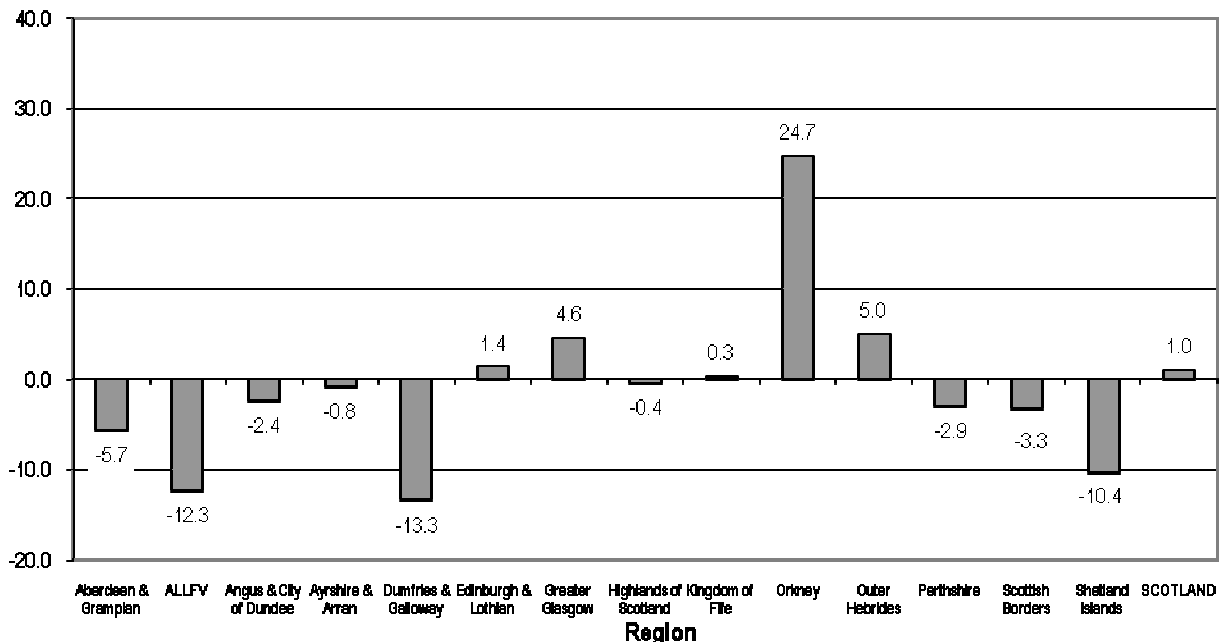
3.0 PERFORMANCE BY VISITSCOTLAND AREA

Performance by VisitScotland Area – June 2008/2007 and January-June 2008/2007

Area	Jun-08	Jun-07	%Change	Jan-Jun-08	Jan-Jun-07	%Change
Aberdeen & Grampian (68)	186,060	197,213	-5.7	775,470	790,737	-1.9
ALLFV (59)	214,844	244,939	-12.3	808,101	888,770	-9.1
Angus & City of Dundee (25)	108,228	110,887	-2.4	480,618	485,433	-1.0
Ayrshire & Arran (16)	87,293	88,009	-0.8	360,759	342,410	5.4
Dumfries & Galloway (36)	51,824	59,807	-13.3	206,082	211,401	-2.5
Edinburgh & Lothian (59)	548,689	541,300	1.4	2,631,333	2,507,552	4.9
Greater Glasgow (68)	1,566,600	1,497,964	4.6	7,819,966	8,130,110	-3.8
Highlands of Scotland (64)	273,810	274,866	-0.4	856,751	830,318	3.2
Kingdom of Fife (26)	62,229	62,034	0.3	236,978	242,952	-2.5
Orkney (18)	78,514	62,947	24.7	173,448	129,885	33.5
Outer Hebrides (9)	27,701	26,392	5.0	118,029	124,712	-5.4
Perthshire (22)	85,067	87,637	-2.9	293,736	296,540	-0.9
Scottish Borders (34)	52,370	54,151	-3.3	191,103	197,240	-3.1
Shetland Islands (17)	25,498	28,451	-10.4	65,442	38,266	71.0
SCOTLAND (521)	3,368,727	3,336,597	1.0	15,017,816	15,216,326	-1.3

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

Performance by VisitScotland Area June 2008/2007

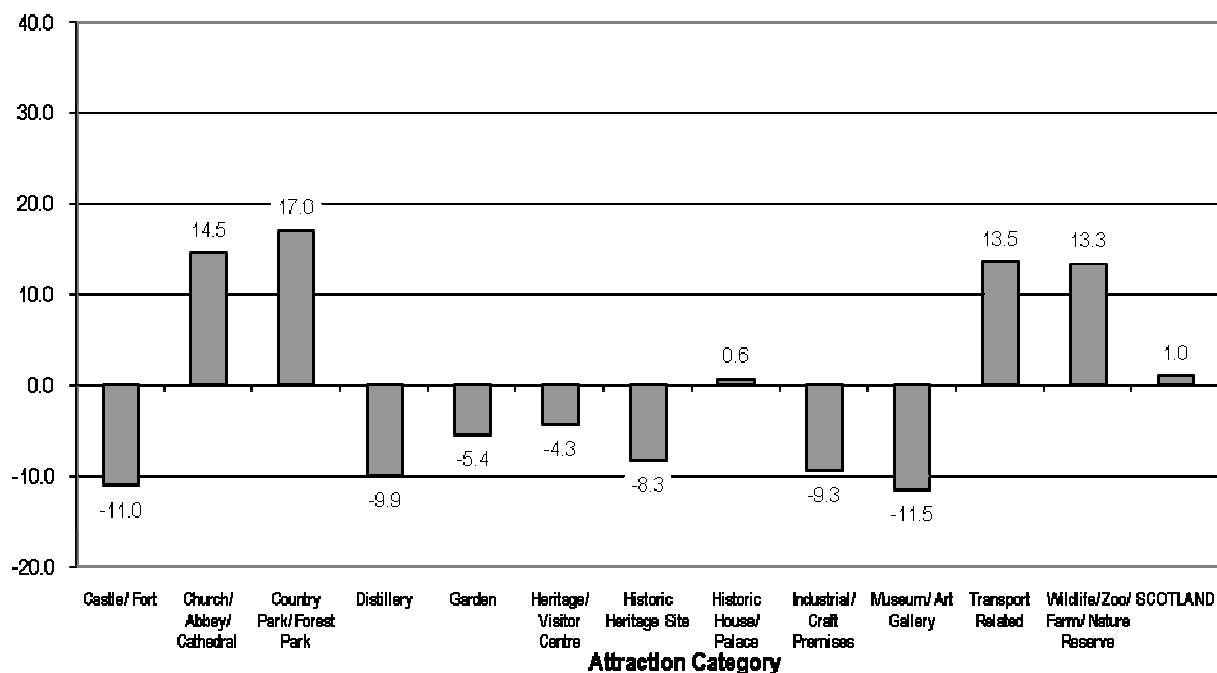


4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – June 2008/2007 and January-June 2008/2007

Category	Jun-08	Jun-07	% Change	Jan-Jun-08	Jan-Jun-07	% Change
Castle/ Fort (60)	395,940	444,798	-11.0	1,402,010	1,474,751	-4.9
Church/ Abbey/ Cathedral (18)	148,015	129,225	14.5	489,278	422,903	15.7
Country Park / Forest Park (15)	1,144,529	978,155	17.0	5,591,094	5,375,874	4.0
Distillery (21)	52,103	57,835	-9.9	177,268	181,083	-2.1
Garden (27)	99,561	105,260	-5.4	409,995	413,427	-0.8
Heritage/ Visitor Centre (85)	358,499	374,611	-4.3	1,455,029	1,475,718	-1.4
Historic Heritage Site (40)	84,745	92,411	-8.3	247,243	263,236	-6.1
Historic House/ Palace (40)	87,709	87,181	0.6	276,350	281,467	-1.8
Industrial/ Craft Premises (9)	5,362	5,915	-9.3	17,045	16,762	1.7
Museum/ Art Gallery (174)	748,778	846,519	-11.5	3,923,154	4,354,861	-9.9
Transport Related (10)	106,601	93,895	13.5	442,492	388,878	13.8
Wildlife/ Zoo/ Farm/ Nature Reserve (22)	136,885	120,792	13.3	586,858	567,366	3.4
SCOTLAND (521)	3,368,727	3,336,597	1.0	15,017,816	15,216,326	-1.3

Performance by Attraction Category June 2008/2007



5.0 PERFORMANCE BY LOCATION

Performance by Location – June 2008/2007 and January-June 2008/2007

Location	Jun-08	Jun-07	% Change	Jan-Jun-08	Jan-Jun-07	% Change
Rural (236)	1,466,086	1,356,166	8.1	6,175,947	6,013,215	2.7
Seaside (66)	158,813	167,903	-5.4	519,813	528,130	-1.6
Urban (219)	1,743,828	1,812,528	-3.8	8,322,056	8,674,981	-4.1
SCOTLAND (521)	3,368,727	3,336,597	1.0	15,017,816	15,216,326	-1.3

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

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – June 2008/2007 and January-June 2008/2007

Range of Volume of Visits	Jun-08	Jun-07	% Change	Jan-Jun-08	Jan-Jun-07	% Change
1 - 19,999 (331)	285,775	297,518	-3.9	894,397	917,639	-2.5
20,000 - 49,999 (81)	296,762	276,752	7.2	1,035,694	949,734	9.1
50,000 + (109)	2,786,190	2,762,327	0.9	13,087,725	13,348,953	-2.0
SCOTLAND (521)	3,368,727	3,336,597	1.0	15,017,816	15,216,326	-1.3

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 – June 2008/2007 and January-June 2008/2007

Admission	Jun-08	Jun-07	% Change	Jan-Jun-08	Jan-Jun-07	% Change
Free (228)	2,237,788	2,161,493	3.5	10,720,127	10,872,285	-1.4
Paid (293)	1,130,939	1,175,104	-3.8	4,297,689	4,344,041	-1.1
SCOTLAND (521)	3,368,727	3,336,597	1.0	15,017,816	15,216,326	-1.3

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 – June 2008/2007 and January-June 2008/2007

LEC	Jun-08	Jun-07	%Change	Jan-Jun-08	Jan-Jun-07	%Change
Argyll & The Islands (31)	83,801	92,983	-9.9	258,117	265,078	-2.6
Ayrshire (15)	82,438	83,090	-0.8	349,168	330,509	5.6
Borders (34)	52,370	54,151	-3.3	191,103	197,240	-3.1
Caithness & Sutherland (13)	20,099	21,706	-7.4	43,569	40,615	7.3
Dumfries & Galloway (35)	51,629	59,584	-13.4	205,275	210,389	-2.4
Dunbartonshire (8)	64,928	46,677	39.1	346,766	247,215	40.3
Edinburgh & Lothians (59)	548,689	541,300	1.4	2,631,333	2,507,552	4.9
Fife (26)	62,229	62,034	0.3	236,978	242,952	-2.5
Forth Valley (26)	176,354	207,163	-14.9	753,261	821,428	-8.3
Glasgow (31)	432,617	523,983	-17.4	2,278,029	2,796,621	-18.5
Grampian (55)	162,908	171,248	-4.9	702,480	717,825	-2.1
Inverness & East Highland (27)	146,608	143,931	1.9	518,036	501,439	3.3
Lanarkshire (20)	957,120	805,488	18.8	4,680,441	4,552,310	2.8
Lochaber (10)	38,388	34,162	12.4	115,994	109,232	6.2
Moray (15)	27,418	30,338	-9.6	81,992	84,146	-2.6
Orkney (18)	78,514	62,947	24.7	173,448	129,885	33.5
Renfrewshire (13)	68,767	71,702	-4.1	319,975	341,431	-6.3
Shetland (17)	25,498	28,451	-10.4	65,442	38,266	71.0
Skye & Wester Ross (11)	59,796	64,844	-7.8	153,439	156,425	-1.9
Tayside (48)	200,855	204,423	-1.7	794,941	801,056	-0.8
Western Isles (9)	27,701	26,392	5.0	118,029	124,712	-5.4
SCOTLAND (521)	3,368,727	3,336,597	1.0	15,017,816	15,216,326	-1.3

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 June 2008.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Special events	Poor weather
Wet weather	Fuel transport strike
	High cost of fuel
	Economic downturn
	Poor exchange rates

*The re-opening of Kelvingrove Museum and Art Gallery in July 2006 continues to impact on overall performance for June 2008. The opening of Shetland Museum and Archives in June 2007 successfully influenced performance for Shetland during the first part of 2008.