

**2008 SCOTTISH VISITOR ATTRACTION BAROMETER  
October 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@gcal.ac.uk](mailto:mma4@gcal.ac.uk)). This Barometer compares the period of October 2008 with October 2007. Some 512 attraction operators provided figures for the month of October 2008 with 500 attractions providing comparable visits figures.

**2.0 October 2008/2007**
**Summary**

The total number of visits for the responding 521 barometer attractions in Scotland for the month of October 2008 was **2,339,944**. When compared to data from the previous year of **2,668,106** visits, this shows a visits decrease of **-12.3%**. The total number of visits for responding attractions for the period January-October 2008 was **28,557,769** when compared to data from the previous year of **29,793,929** this shows a visits decrease of **-4.1%**.

\*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 October 2008/2007 and January-October 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           | Oct-08    | Oct-07    | %Change | Jan-Oct-08 | Jan-Oct-07 | %Change |
|-----------------------|-----------|-----------|---------|------------|------------|---------|
| 500                   | 2,339,944 | 2,668,106 | -12.3   | 28,557,769 | 29,793,929 | -4.1    |
| *499 (Ex Kelvingrove) | 2,226,019 | 2,504,364 | -11.1   | 27,290,181 | 27,780,628 | -1.8    |

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

| Attractions | Months | Visits    | Months | Visits    | %Change |
|-------------|--------|-----------|--------|-----------|---------|
| 500         | Jan-08 | 1,424,766 | Jan-07 | 1,515,928 | -6.0    |
|             | Feb-08 | 1,750,554 | Feb-07 | 1,741,215 | 0.5     |
|             | Mar-08 | 2,264,824 | Mar-07 | 1,896,614 | 19.4    |
|             | Apr-08 | 2,780,266 | Apr-07 | 3,250,532 | -14.5   |
|             | May-08 | 3,252,133 | May-07 | 3,266,639 | -0.4    |
|             | Jun-08 | 3,347,835 | Jun-07 | 3,288,254 | 1.8     |
|             | Jul-08 | 4,097,366 | Jul-07 | 4,481,853 | -8.6    |
|             | Aug-08 | 4,301,654 | Aug-07 | 4,628,120 | -7.1    |
|             | Sep-08 | 2,998,427 | Sep-07 | 3,056,668 | -1.9    |
|             | Oct-08 | 2,339,944 | Oct-07 | 2,668,106 | -12.3   |

The greatest percentage increase in visits recorded by VisitScotland Area for October 2008 was experienced by attractions in Shetland Islands (10.4%) and Highlands of Scotland (0.3%). Greater Glasgow experienced the greatest percentage decrease in visits figures over the same period of -19.5%, followed by Ayrshire & Arran (-16.9%) and ALLFV (-15.6%).

During this period the only percentage increase in visits was recorded by the Industrial/ Craft Premises category (4.3%). Country Park/ Forest Park sites experienced the greatest percentage decrease in visits of -21.4%, followed by the Distillery sector (-12.8%) and Garden sites (-11.0%) when comparing October 2008 with October 2007.

Attractions in Rural locations experienced the greatest decrease in visits of -17.5% with Urban located attractions experiencing decreases of -9.1% and Seaside located attractions experiencing decreases of -6.2%. Attractions welcoming between 20,000 and 49,999 visits experienced an small increase of 0.5%, whilst those welcoming more than 50,000 visits experienced the greatest decreases of -13.6%, with those welcoming between 1 and 19,999 visits experiencing decreases of -7.1%.

Both Free and Paid admission attractions experienced decreases in visit of -14.8% and -6.6% respectively. The greatest percentage increases in visits by former LEC area were experienced by attractions in Shetland Islands (10.4%) and Caithness & Sutherland (8.3%). Attractions in Lanarkshire experienced the greatest decrease of -23.3% followed by those located in Ayrshire who experienced decreases of -17.2% and -21.2% when comparing October 2008 with October 2007.

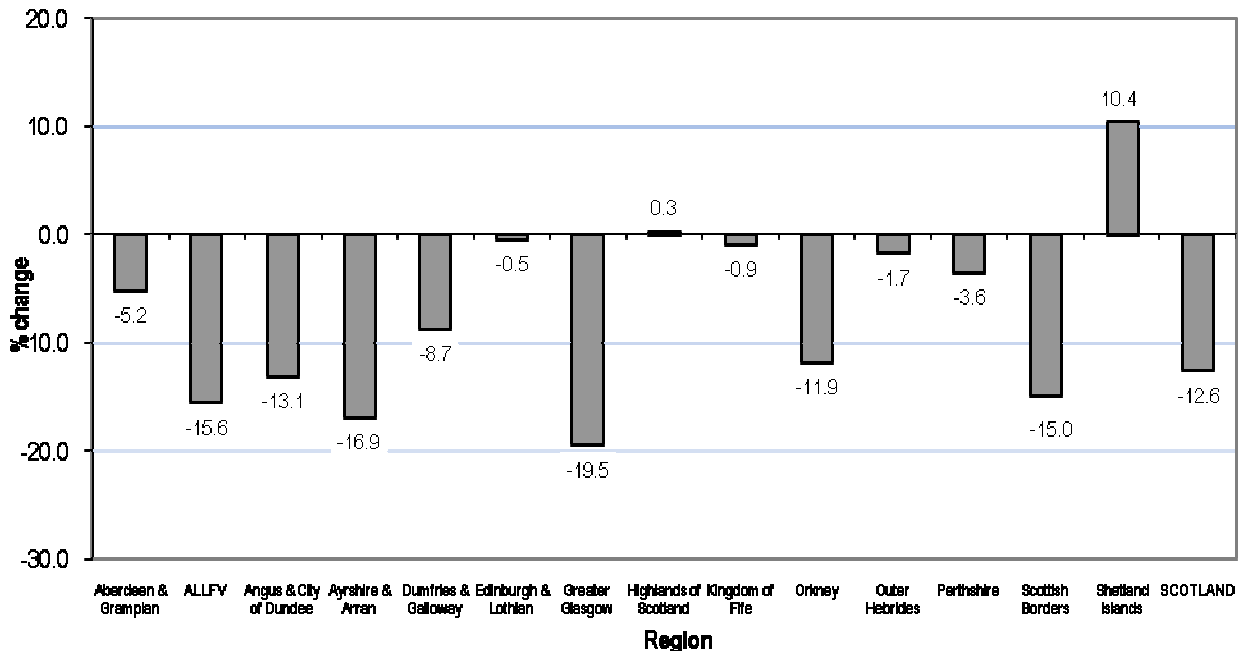
**3.0 PERFORMANCE BY VISITSCOTLAND AREA**

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

| Area                        | Oct-08           | Oct-07           | %Change      | Jan-Oct-08        | Jan-Oct-07        | %Change     |
|-----------------------------|------------------|------------------|--------------|-------------------|-------------------|-------------|
| Aberdeen & Grampian (61)    | 105,833          | 111,631          | -5.2         | 1,312,639         | 1,391,712         | -5.7        |
| ALLFV (55)                  | 138,386          | 163,959          | -15.6        | 1,851,774         | 1,955,896         | -5.3        |
| Angus & City of Dundee (25) | 58,197           | 67,001           | -13.1        | 740,516           | 753,996           | -1.8        |
| Ayrshire & Arran (18)       | 76,021           | 91,528           | -16.9        | 979,269           | 1,031,879         | -5.1        |
| Dumfries & Galloway (33)    | 33,929           | 37,178           | -8.7         | 429,508           | 468,689           | -8.4        |
| Edinburgh & Lothian (59)    | 525,978          | 528,688          | -0.5         | 5,681,700         | 5,613,436         | 1.2         |
| Greater Glasgow (64)        | 1,062,896        | 1,319,814        | -19.5        | 13,063,570        | 14,021,570        | -6.8        |
| Highlands of Scotland (58)  | 168,274          | 167,817          | 0.3          | 2,079,166         | 2,116,749         | -1.8        |
| Kingdom of Fife (28)        | 40,986           | 41,370           | -0.9         | 515,198           | 531,384           | -3.0        |
| Orkney (20)                 | 13,976           | 15,856           | -11.9        | 454,184           | 423,061           | 7.4         |
| Outer Hebrides (7)          | 19,104           | 19,437           | -1.7         | 236,041           | 238,965           | -1.2        |
| Perthshire (22)             | 56,495           | 58,604           | -3.6         | 666,972           | 698,332           | -4.5        |
| Scottish Borders (33)       | 33,700           | 39,637           | -15.0        | 411,640           | 437,909           | -6.0        |
| Shetland Islands (17)       | 6,169            | 5,586            | 10.4         | 135,592           | 110,351           | 22.9        |
| <b>SCOTLAND (500)</b>       | <b>2,339,944</b> | <b>2,668,106</b> | <b>-12.3</b> | <b>28,557,769</b> | <b>29,793,929</b> | <b>-4.1</b> |

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

**Performance by VisitScotland Area Oct 2008/2007**

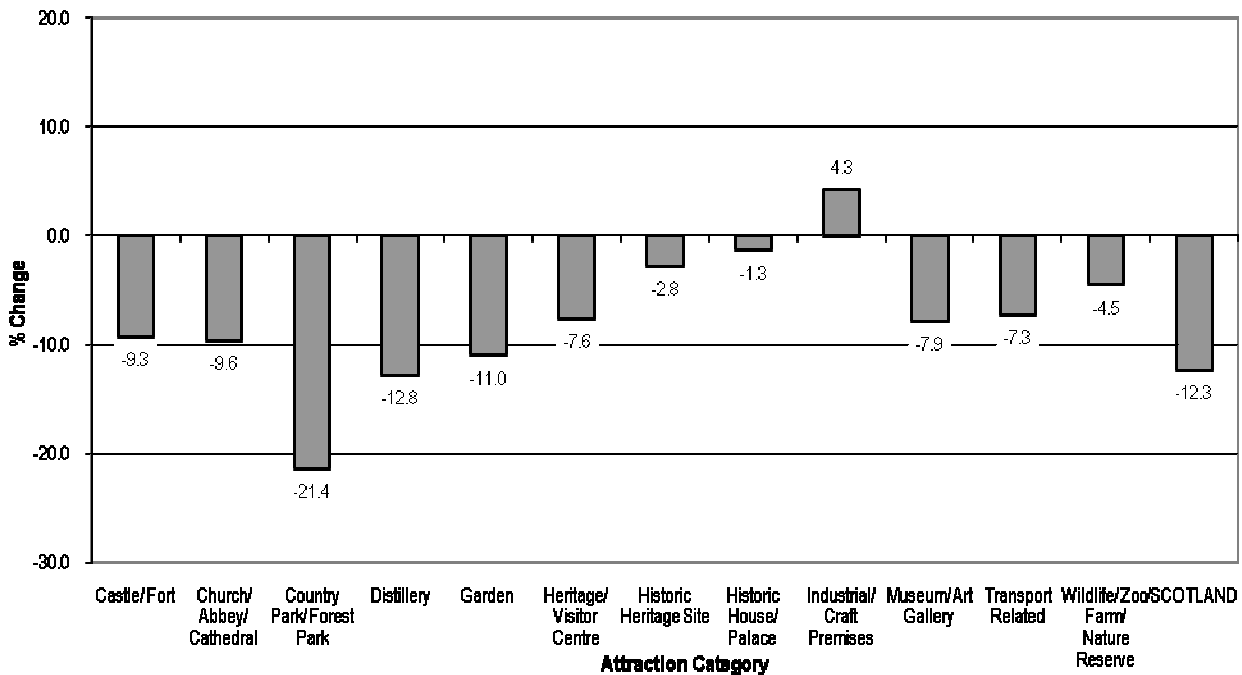


**4.0 PERFORMANCE BY ATTRACTION CATEGORY**

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

| Category                                 | Oct-08           | Oct-07           | % Change     | Jan-Oct-08        | Jan-Oct-07        | % Change    |
|--|------------------|------------------|--------------|-------------------|-------------------|-------------|
| Castle/ Fort (58)                        | 238,931          | 263,489          | -9.3         | 3,178,650         | 3,532,335         | -10.0       |
| Church/ Abbey/ Cathedral (18)            | 74,025           | 81,896           | -9.6         | 1,086,540         | 1,023,570         | 6.2         |
| Country Park / Forest Park (14)          | 695,353          | 884,664          | -21.4        | 9,264,272         | 9,291,901         | -0.3        |
| Distillery (20)                          | 30,229           | 34,680           | -12.8        | 403,234           | 438,959           | -8.1        |
| Garden (29)                              | 60,624           | 68,105           | -11.0        | 801,702           | 825,427           | -2.9        |
| Heritage/ Visitor Centre (82)            | 301,366          | 326,152          | -7.6         | 3,399,649         | 3,389,038         | 0.3         |
| Historic Heritage Site (40)              | 36,737           | 37,799           | -2.8         | 614,203           | 669,248           | -8.2        |
| Historic House/ Palace (40)              | 57,272           | 58,053           | -1.3         | 659,077           | 697,852           | -5.6        |
| Industrial/ Craft Premises (10)          | 3,478            | 3,336            | 4.3          | 43,213            | 42,775            | 1.0         |
| Museum/ Art Gallery (160)                | 676,172          | 734,183          | -7.9         | 7,110,877         | 7,958,837         | -10.7       |
| Transport Related (9)                    | 68,914           | 74,316           | -7.3         | 836,696           | 791,548           | 5.7         |
| Wildlife/ Zoo/ Farm/ Nature Reserve (20) | 96,843           | 101,433          | -4.5         | 1,159,656         | 1,132,439         | 2.4         |
| <b>SCOTLAND (500)</b>                    | <b>2,339,944</b> | <b>2,668,106</b> | <b>-12.3</b> | <b>28,557,769</b> | <b>29,793,929</b> | <b>-4.1</b> |

**Performance by Attraction Category Oct 2008/2007**



**5.0 PERFORMANCE BY LOCATION**

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

| Location              | Oct-08           | Oct-07           | % Change     | Jan-Oct-08        | Jan-Oct-07        | %Change     |
|-----------------------|------------------|------------------|--------------|-------------------|-------------------|-------------|
| Rural (222)           | 861,514          | 1,043,802        | -17.5        | 11,247,683        | 11,429,602        | -1.6        |
| Seaside (63)          | 70,589           | 75,229           | -6.2         | 1,151,196         | 1,198,671         | -4.0        |
| Urban (215)           | 1,407,841        | 1,549,075        | -9.1         | 16,158,890        | 17,165,656        | -5.8        |
| <b>SCOTLAND (500)</b> | <b>2,339,944</b> | <b>2,668,106</b> | <b>-12.3</b> | <b>28,557,769</b> | <b>29,793,929</b> | <b>-4.1</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 – October 2008/2007 and January-October 2008/2007

| Range of Volume of Visits | Oct-08           | Oct-07           | % Change     | Jan-Oct-08        | Jan-Oct-07        | %Change     |
|---------------------------|------------------|------------------|--------------|-------------------|-------------------|-------------|
| 1 - 19,999 (315)          | 149,394          | 160,736          | -7.1         | 2,101,490         | 2,193,899         | -4.2        |
| 20,000 - 49,999 (76)      | 176,263          | 175,321          | 0.5          | 2,078,556         | 2,113,870         | -1.7        |
| 50,000 + (109)            | 2,014,287        | 2,332,049        | -13.6        | 24,377,723        | 25,486,160        | -4.3        |
| <b>SCOTLAND (500)</b>     | <b>2,339,944</b> | <b>2,668,106</b> | <b>-12.3</b> | <b>28,557,769</b> | <b>29,793,929</b> | <b>-4.1</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 – October 2008/2007 and January-October 2008/2007

| Admission             | Oct-08           | Oct-07           | % Change     | Jan-Oct-08        | Jan-Oct-07        | %Change     |
|-----------------------|------------------|------------------|--------------|-------------------|-------------------|-------------|
| Free (214)            | 1,575,317        | 1,849,766        | -14.8        | 19,380,310        | 20,151,522        | -3.8        |
| Paid (286)            | 764,627          | 818,340          | -6.6         | 9,177,459         | 9,642,407         | -4.8        |
| <b>SCOTLAND (500)</b> | <b>2,339,944</b> | <b>2,668,106</b> | <b>-12.3</b> | <b>28,557,769</b> | <b>29,793,929</b> | <b>-4.1</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 – October 2008/2007 and January-October 2008/2007

| LEC                            | Oct-08           | Oct-07           | %Change      | Jan-Oct-08        | Jan-Oct-07        | %Change     |
|--------------------------------|------------------|------------------|--------------|-------------------|-------------------|-------------|
| Argyll & The Islands (25)      | 32,355           | 36,058           | -10.3        | 455,263           | 483,871           | -5.9        |
| Ayrshire (17)                  | 73,136           | 88,337           | -17.2        | 946,217           | 996,263           | -5.0        |
| Borders (33)                   | 33,700           | 39,637           | -15.0        | 411,640           | 437,909           | -6.0        |
| Caithness & Sutherland (12)    | 5,440            | 5,022            | 8.3          | 120,073           | 121,426           | -1.1        |
| Dumfries & Galloway (32)       | 33,797           | 35,389           | -4.5         | 427,403           | 464,464           | -8.0        |
| Dunbartonshire (11)            | 75,622           | 82,820           | -8.7         | 1,039,804         | 827,491           | 25.7        |
| Edinburgh & Lothians (59)      | 525,978          | 528,688          | -0.5         | 5,681,700         | 5,613,436         | 1.2         |
| Fife (28)                      | 40,986           | 41,370           | -0.9         | 515,198           | 531,384           | -3.0        |
| Forth Valley (24)              | 120,703          | 144,954          | -16.7        | 1,398,242         | 1,587,266         | -11.9       |
| Glasgow (26)                   | 335,283          | 395,972          | -15.3        | 3,483,184         | 4,375,994         | -20.4       |
| Grampian (51)                  | 95,313           | 98,744           | -3.5         | 1,150,735         | 1,207,234         | -4.7        |
| Inverness & East Highland (24) | 111,359          | 108,306          | 2.8          | 1,200,280         | 1,202,495         | -0.2        |
| Lanarkshire (21)               | 592,597          | 772,272          | -23.3        | 8,010,853         | 8,107,144         | -1.2        |
| Lochaber (10)                  | 20,382           | 22,861           | -10.8        | 271,326           | 279,744           | -3.0        |
| Moray (12)                     | 11,974           | 12,245           | -2.2         | 186,949           | 209,465           | -10.7       |
| Orkney (20)                    | 13,976           | 15,856           | -11.9        | 454,184           | 423,061           | 7.4         |
| Renfrewshire (13)              | 48,562           | 58,004           | -16.3        | 552,295           | 620,267           | -11.0       |
| Shetland (17)                  | 6,169            | 5,586            | 10.4         | 135,592           | 110,351           | 22.9        |
| Skye & Wester Ross (10)        | 26,482           | 28,390           | -6.7         | 430,115           | 457,599           | -6.0        |
| Tayside (48)                   | 117,026          | 128,158          | -8.7         | 1,450,675         | 1,498,100         | -3.2        |
| Western Isles (7)              | 19,104           | 19,437           | -1.7         | 236,041           | 238,965           | -1.2        |
| <b>SCOTLAND (500)</b>          | <b>2,339,944</b> | <b>2,668,106</b> | <b>-12.3</b> | <b>28,557,769</b> | <b>29,793,929</b> | <b>-4.1</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 October 2008.

| Reasons for positive impacts on visitor figures:- | Reasons for negative impacts in visitor figures:-                                   |
|---|---|
| October school holidays<br>Repeat visitors        | High fuel costs<br>Economic downturn<br>Decrease in US visitors<br>Terrible weather |

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