

**2008 SCOTTISH VISITOR ATTRACTION BAROMETER
September 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 September 2008 with September 2007. Some 542 attraction operators provided figures for the month of September 2008 with 521 attractions providing comparable visits figures.

2.0 September 2008/2007
Summary

The total number of visits for the responding 521 barometer attractions in Scotland for the month of September 2008 was **3,071,682**. When compared to data from the previous year of **3,166,662** visits, this shows a visits decrease of **-3.0%**. The total number of visits for responding attractions for the period January-September 2008 was **26,758,256** when compared to data from the previous year of **27,735,720** this shows a visits decrease of **-3.5%**.

*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 September 2008/2007 and January-September 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	Sep-08	Sep-07	%Change	Jan-Sep-08	Jan-Sep-07	%Change
521	3,071,682	3,166,662	-3.0	26,758,256	27,735,720	-3.5
*520 (Ex Kelvingrove)	2,970,231	3,022,864	-1.7	25,604,593	25,886,161	-1.1

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

Attractions	Months	Visits	Months	Visits	%Change
521	Jan-08	1,452,702	Jan-07	1,533,800	-5.3
	Feb-08	1,802,641	Feb-07	1,768,369	1.9
	Mar-08	2,314,199	Mar-07	1,929,470	19.9
	Apr-08	2,834,122	Apr-07	3,310,984	-14.4
	May-08	3,311,311	May-07	3,327,828	-0.5
	Jun-08	3,403,173	Jun-07	3,361,380	1.2
	Jul-08	4,185,652	Jul-07	4,590,724	-8.8
	Aug-08	4,382,774	Aug-07	4,746,503	-7.7
	Sep-08	3,071,682	Sep-07	3,166,662	-3.0

The greatest percentage increase in visits recorded by VisitScotland Area for September 2008 was experienced by Greater Glasgow (6.2%) and Shetland Islands (5.3%). Argyll, Loch Lomond & Forth Valley (ALLFV) experienced the greatest percentage decrease in visits figures over the same period of -18.9%, followed by Scottish Borders (-15.5%) and Perthshire (-15.3%).

During this period the only percentage increase in visits was recorded by the Country Park/ Forest Park category (15.6%). Distillery sites experienced the greatest percentage decrease in visits of -16.7%, followed by the Castle/ Fort sector (-16.6%) and Industrial/ Craft Premises sites (-14.5%) when comparing September 2008 with September 2007.

Attractions in Rural locations experienced an increase in visits of 5.2%. Seaside located attractions experienced the greatest decrease of -9.6% whilst Urban located attractions experienced decreases of -7.7%. Attractions welcoming between 1 and 19,999 visits experienced the greatest decreases of -10.1%, whilst those attracting between 20,000 and 49,999 and more than 50,000 experienced decreases of -8.2% and -1.7% respectively.

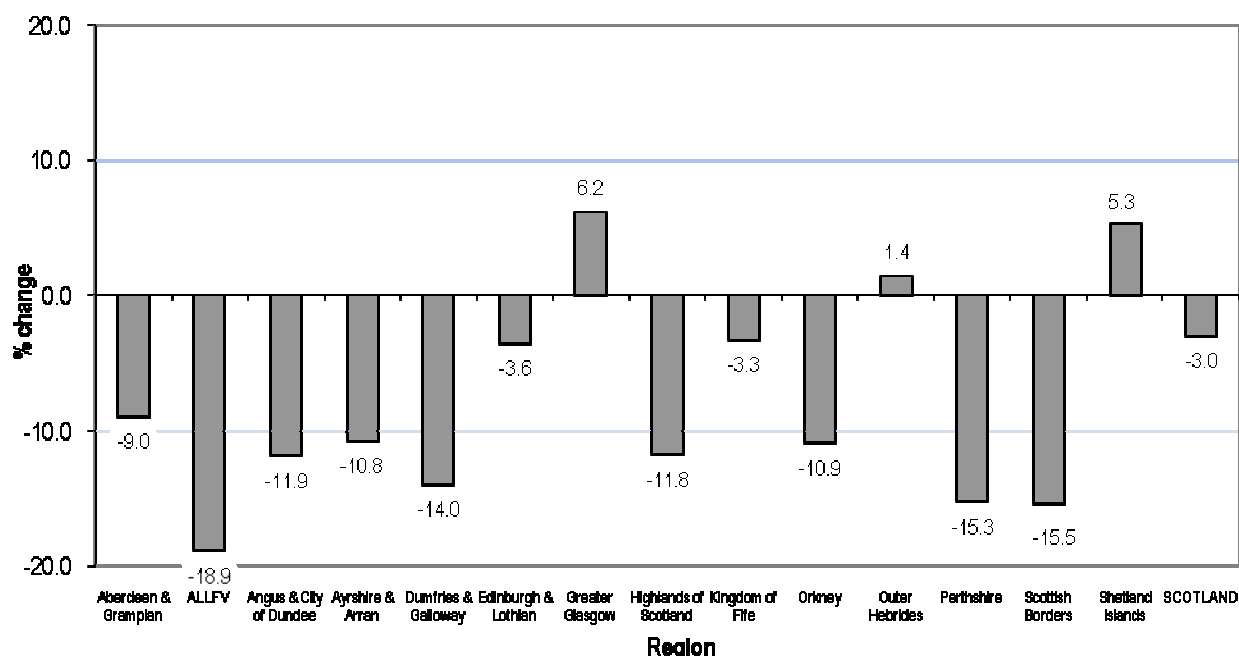
Free admission attractions experienced an increase of 2.1%, whilst Paid admission attractions experienced a decrease of -12.4%. The greatest percentage increases in visits by former LEC area were experienced by attractions in Lanarkshire (24.8%); Shetland Islands (5.3%) and Western Isles (1.4%). Attractions in Lochaber experienced the greatest decrease of -23.3% followed by those located in Dunbartonshire and Renfrewshire who experienced decreases of -22.2% and -21.2% respectively when comparing September 2008 with September 2007.

3.0 PERFORMANCE BY VISITSCOTLAND AREA

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

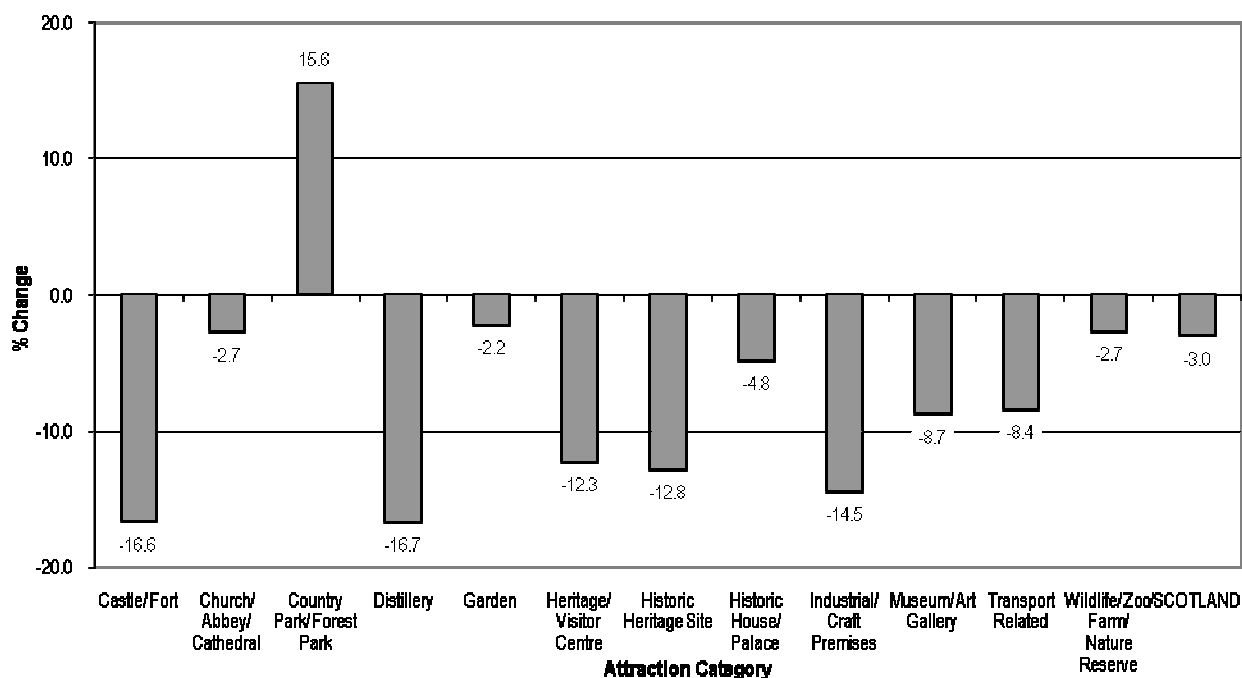
Area	Sep-08	Sep-07	%Change	Jan-Sep-08	Jan-Sep-07	%Change
Aberdeen & Grampian (63)	141,474	155,395	-9.0	1,358,706	1,431,012	-5.1
ALLFV (59)	216,909	267,449	-18.9	1,867,774	1,996,866	-6.5
Angus & City of Dundee (27)	97,557	110,714	-11.9	887,775	915,294	-3.0
Ayrshire & Arran (17)	76,589	85,829	-10.8	788,907	841,835	-6.3
Dumfries & Galloway (36)	49,438	57,488	-14.0	418,472	455,192	-8.1
Edinburgh & Lothian (63)	621,020	644,235	-3.6	5,401,042	5,334,407	1.2
Greater Glasgow (67)	1,384,856	1,303,920	6.2	11,985,852	12,660,970	-5.3
Highlands of Scotland (62)	222,673	252,427	-11.8	1,796,381	1,834,926	-2.1
Kingdom of Fife (28)	57,518	59,467	-3.3	474,212	490,014	-3.2
Orkney (21)	49,182	55,214	-10.9	444,358	412,911	7.6
Outer Hebrides (7)	24,504	24,162	1.4	216,937	219,528	-1.2
Perthshire (22)	73,585	86,874	-15.3	610,477	639,728	-4.6
Scottish Borders (32)	42,634	50,435	-15.5	377,940	398,272	-5.1
Shetland Islands (17)	13,743	13,053	5.3	129,423	104,765	23.5
SCOTLAND (521)	3,071,682	3,166,662	-3.0	26,758,256	27,735,720	-3.5

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

Performance by VisitScotland Area Sep 2008/2007

4.0 PERFORMANCE BY ATTRACTION CATEGORY

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

Category	Sep-08	Sep-07	% Change	Jan-Sep-08	Jan-Sep-07	% Change
Castle/ Fort (59)	326,027	391,124	-16.6	2,960,809	3,292,020	-10.1
Church/ Abbey/ Cathedral (19)	126,702	130,227	-2.7	1,019,007	948,051	7.5
Country Park / Forest Park (15)	1,025,191	886,885	15.6	8,630,600	8,485,255	1.7
Distillery (22)	57,012	68,423	-16.7	419,490	451,621	-7.1
Garden (27)	79,996	81,789	-2.2	738,834	755,002	-2.1
Heritage/ Visitor Centre (91)	393,080	448,144	-12.3	3,474,949	3,482,133	-0.2
Historic Heritage Site (40)	72,445	83,089	-12.8	577,466	631,449	-8.5
Historic House/ Palace (39)	75,312	79,131	-4.8	601,148	639,121	-5.9
Industrial/ Craft Premises (10)	4,866	5,688	-14.5	39,735	39,439	0.8
Museum/ Art Gallery (171)	729,289	799,176	-8.7	6,701,984	7,483,847	-10.4
Transport Related (8)	97,458	106,381	-8.4	642,832	591,494	8.7
Wildlife/ Zoo/ Farm/ Nature Reserve (20)	84,304	86,605	-2.7	951,402	936,288	1.6
SCOTLAND (521)	3,071,682	3,166,662	-3.0	26,758,256	27,735,720	-3.5

Performance by Attraction Category Sep 2008/2007

5.0 PERFORMANCE BY LOCATION

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

Location	Sep-08	Sep-07	% Change	Jan-Sep-08	Jan-Sep-07	%Change
Rural (230)	1,245,872	1,184,255	5.2	10,368,353	10,407,219	-0.4
Seaside (66)	156,695	173,274	-9.6	1,345,228	1,399,261	-3.9
Urban (225)	1,669,115	1,809,133	-7.7	15,044,675	15,929,240	-5.6
SCOTLAND (521)	3,071,682	3,166,662	-3.0	26,758,256	27,735,720	-3.5

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

6.0 PERFORMANCE BY VOLUME OF VISITS

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

Range of Volume of Visits	Sep-08	Sep-07	% Change	Jan-Sep-08	Jan-Sep-07	%Change
1 - 19,999 (329)	257,981	286,870	-10.1	2,048,223	2,151,646	-4.8
20,000 - 49,999 (81)	249,058	271,346	-8.2	2,040,652	2,060,654	-1.0
50,000 + (111)	2,564,643	2,608,446	-1.7	22,669,381	23,523,420	-3.6
SCOTLAND (521)	3,071,682	3,166,662	-3.0	26,758,256	27,735,720	-3.5

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 – September 2008/2007 and January-September 2008/2007

Admission	Sep-08	Sep-07	% Change	Jan-Sep-08	Jan-Sep-07	%Change
Free (226)	2,101,512	2,059,195	2.1	18,235,319	18,746,025	-2.7
Paid (295)	970,170	1,107,467	-12.4	8,522,937	8,989,695	-5.2
SCOTLAND (521)	3,071,682	3,166,662	-3.0	26,758,256	27,735,720	-3.5

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 – September 2008/2007 and January-September 2008/2007

LEC	Sep-08	Sep-07	%Change	Jan-Sep-08	Jan-Sep-07	%Change
Argyll & The Islands (29)	65,234	82,252	-20.7	551,209	591,291	-6.8
Ayrshire (16)	72,776	81,222	-10.4	758,740	809,410	-6.3
Borders (32)	42,634	50,435	-15.5	377,940	398,272	-5.1
Caithness & Sutherland (13)	17,247	18,786	-8.2	117,410	119,249	-1.5
Dumfries & Galloway (35)	49,032	56,923	-13.9	416,499	452,756	-8.0
Dunbartonshire (11)	103,043	132,380	-22.2	964,182	744,671	29.5
Edinburgh & Lothians (63)	621,020	644,235	-3.6	5,401,042	5,334,407	1.2
Fife (28)	57,518	59,467	-3.3	474,212	490,014	-3.2
Forth Valley (25)	154,707	191,524	-19.2	1,308,710	1,509,746	-13.3
Glasgow (30)	360,819	422,499	-14.6	3,409,225	4,219,997	-19.2
Grampian (53)	122,901	133,760	-8.1	1,207,322	1,259,421	-4.1
Inverness & East Highland (24)	112,729	123,988	-9.1	944,487	948,839	-0.5
Lanarkshire (21)	897,680	719,136	24.8	7,418,256	7,334,872	1.1
Lochaber (11)	32,011	41,743	-23.3	268,136	273,545	-2.0
Moray (12)	22,476	26,800	-16.1	174,975	197,220	-11.3
Orkney (21)	49,182	55,214	-10.9	444,358	412,911	7.6
Renfrewshire (12)	23,948	30,389	-21.2	227,587	281,502	-19.2
Shetland (17)	13,743	13,053	5.3	129,423	104,765	23.5
Skye & Wester Ross (11)	52,597	55,038	-4.4	408,501	435,063	-6.1
Tayside (50)	175,881	203,656	-13.6	1,539,105	1,598,241	-3.7
Western Isles (7)	24,504	24,162	1.4	216,937	219,528	-1.2
SCOTLAND (521)	3,071,682	3,166,662	-3.0	26,758,256	27,735,720	-3.5

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 September 2008.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Good weather increased visits Doors Open Day Sales up	High fuel costs Economic downturn Decrease in US visitors

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