

2009 SCOTTISH VISITOR ATTRACTION BAROMETER June 2009 REPORT

Commissioned by VisitScotland

Conducted by the Moffat Centre for Travel and Tourism
Business Development, 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 2009 with June 2008. Some 552 attraction operators provided figures for the months of June 2009 with 528 attractions providing comparable visits figures.

2.0 June 2009/2008

Summary

The total number of visits for the responding 528 barometer attractions in Scotland for the period June 2009 was 3,848,630. When compared to data from the previous year of 3,603,409 visits, this shows a visits increase of 6.8%. The total number of visits for responding attractions for January-June 2009 was 16,764,506, when compared to data from the previous year of 16,372,825 this shows a visits increase of 2.4%.

The following table shows total visits recorded for June 2009/2008 and January-June 2009/2008 as well as the % change calculation.

Attractions	June-09	June-08	%Change	Jan-Jun-09	Jan-Jun-08	%Change
528	3,848,630	3,603,409	6.8	16,764,506	16,372,825	2.4

A further breakdown is shown below, where the visits during the individual months of January-June 2009 can be compared with January-June 2008 with their % change calculations.

Attractions	Months	Visits	Months	Visits	%Change
528	Jan-09	1,567,129	Jan-08	1,596,728	-1.9
	Feb-09	1,887,918	Feb-08	1,972,982	-4.3
	Mar-09	2,376,536	Mar-08	2,594,642	-8.4
	Apr-09	3,561,962	Apr-08	3,066,850	16.1
	May-09	3,522,331	May-08	3,538,214	-0.4
	Jun-09	3,848,630	Jun-08	3,603,409	6.8

The greatest percentage increases in visits recorded by former VisitScotland Areas for June 2009 were experienced by Outer Hebrides (27.6%), Scottish Borders (12.5%) and Highlands of Scotland (12%). Shetland Islands experienced the greatest decline in visits over the same period with decreases of -14.1%. Perthshire and Argyll, Loch Lomond & Forth Valley experienced decreases in visits figures of -5.8% and -4.6% respectively.

During this period the greatest percentage increase in visits was recorded by the Country Park/Forest Park category (14.1%) followed by Church/ Abbey/ Cathedral sites (9.8%) and Wildlife/ Farm/ Nature Reserve sites (8.5%). Decreases in visits were experienced by attractions in the Historic House/ Palace category at (-2.1%) and the Castle/ Fort category (-0.1%) only.

Attractions in all locations experienced similar increases in visits, with Seaside located attractions experiencing increases of 7.8%, following by Rural (6.9%) and Urban (6.7%) attractions. Attractions of all sizes experienced increases in visits numbers comparing June 2009 with June 2008, with those welcoming between 1 and 19,999 experiencing the greatest increases at 11.1%.

Both Free and Paid admission attractions experienced increases, of 8.8% and 3.0% respectively. The greatest increases in visits by former LEC area were experienced by attractions in Western Isles (27.6%) and Lochaber (23%). Shetland experienced the greatest decrease of -14.1% followed by Dunbartonshire and Glasgow with decreases of -11.8% and -8.5% respectively when comparing June 2009 with June 2008.

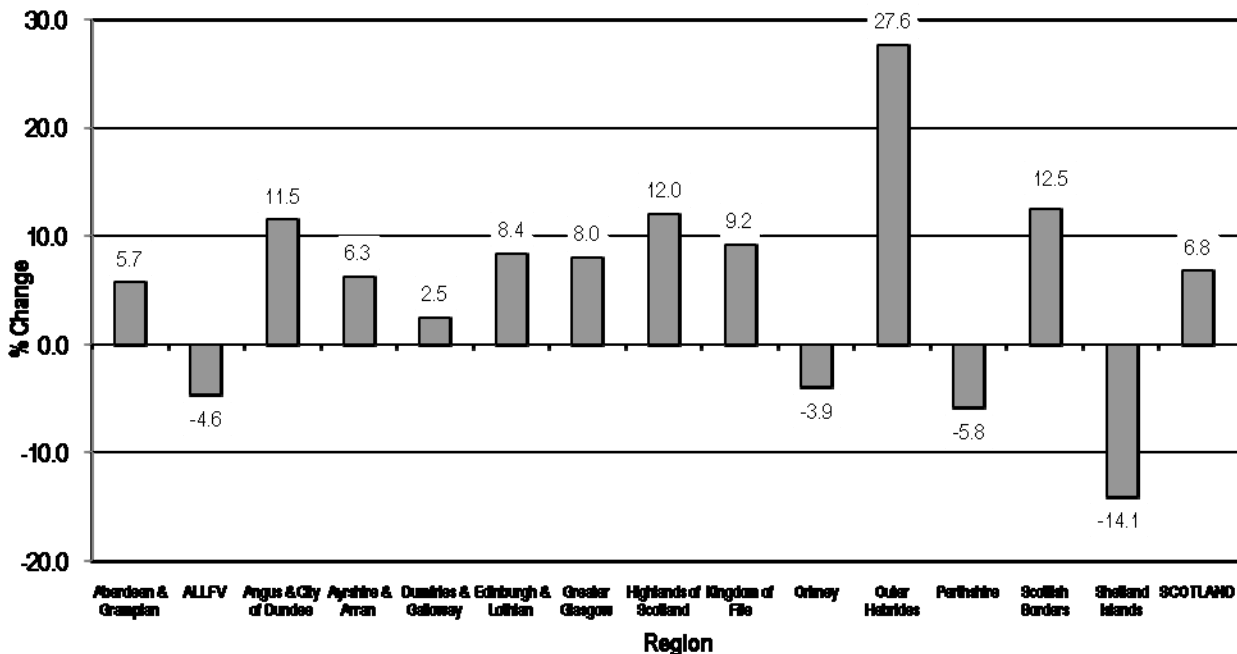
3.0 PERFORMANCE BY FORMER VISITSCOTLAND AREA

Performance by Former VisitScotland Area – June 2009/2008 and January-June 2009/2008

Area	June-09	June-08	%Change	Jan-Jun-09	Jan-Jun-08	%Change
Aberdeen & Grampian (66)	182,144	172,278	5.7	736,866	714,627	3.1
ALLFV (63)	265,964	278,773	-4.6	995,369	1,060,052	-6.1
Angus & City of Dundee (27)	121,495	108,952	11.5	515,018	486,272	5.9
Ayrshire & Arran (15)	129,373	121,748	6.3	523,897	496,716	5.5
Dumfries & Galloway (36)	60,598	59,111	2.5	244,440	238,233	2.6
Edinburgh & Lothian (68)	773,799	713,693	8.4	3,693,302	3,646,094	1.3
Greater Glasgow (64)	1,640,876	1,519,221	8.0	7,875,129	7,618,325	3.4
Highlands of Scotland (63)	335,224	299,297	12.0	1,073,725	1,003,047	7.0
Kingdom of Fife (28)	74,138	67,868	9.2	282,067	280,178	0.7
Orkney (20)	76,168	79,286	-3.9	166,020	174,995	-5.1
Outer Hebrides (9)	35,541	27,852	27.6	128,828	118,476	8.7
Perthshire (22)	75,707	80,358	-5.8	262,993	287,544	-8.5
Scottish Borders (31)	55,910	49,713	12.5	206,103	182,726	12.8
*Shetland Islands (16)	21,693	25,259	-14.1	60,749	65,540	-7.3
SCOTLAND (528)	3,848,630	3,603,409	6.8	16,764,506	16,372,825	2.4

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

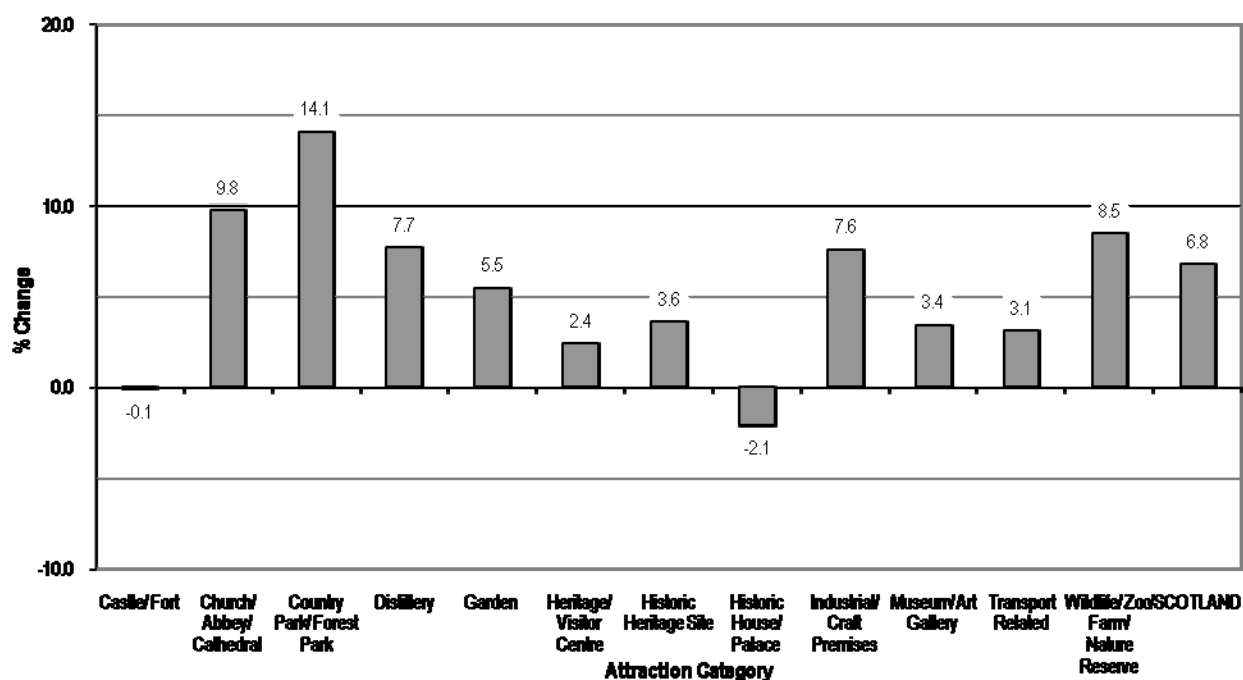
Performance by VisitScotland Area June 2009/2008



4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – June 2009/2008 and January-June 2009/2008

Category	June-09	June-08	% Change	Jan-Jun-09	Jan-Jun-08	% Change
Castle/ Fort (59)	392,556	392,845	-0.1	1,338,951	1,357,261	-1.3
Church/ Abbey/ Cathedral (20)	174,797	159,246	9.8	566,494	524,400	8.0
Country Park / Forest Park (14)	1,297,099	1,136,864	14.1	5,910,539	5,627,894	5.0
Distillery (25)	74,568	69,240	7.7	216,228	207,766	4.1
Garden (26)	104,886	99,438	5.5	426,226	405,395	5.1
Heritage/ Visitor Centre (86)	519,600	507,347	2.4	2,128,724	2,147,915	-0.9
Historic Heritage Site (36)	84,176	81,257	3.6	241,258	242,665	-0.6
Historic House/ Palace (37)	71,222	72,743	-2.1	241,402	235,227	2.6
Industrial/ Craft Premises (13)	14,223	13,219	7.6	58,688	62,783	-6.5
Museum/ Art Gallery (176)	835,985	808,199	3.4	4,524,335	4,490,767	0.7
Transport Related (11)	111,020	107,658	3.1	456,817	444,651	2.7
Wildlife/ Zoo/ Farm/ Nature Reserve (25)	168,498	155,353	8.5	654,844	626,101	4.6
SCOTLAND (528)	3,848,630	3,603,409	6.8	16,764,506	16,372,825	2.4

Performance by Attraction Category June 2009/2008

5.0 PERFORMANCE BY LOCATION

Performance by Location – June 2009/2008 and January-June 2009/2008

Location	June-09	June-08	% Change	Jan-Jun-09	Jan-Jun-08	%Change
Rural (230)	1,565,238	1,464,837	6.9	6,252,230	6,140,311	1.8
Seaside (70)	249,172	231,204	7.8	843,322	813,105	3.7
Urban (228)	2,034,220	1,907,368	6.7	9,668,954	9,419,409	2.7
SCOTLAND (528)	3,848,630	3,603,409	6.8	16,764,506	16,372,825	2.4

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 2009/2008 and January-June 2009/2008

Volume of Visits	June-09	June-08	% Change	Jan-Jun-09	Jan-Jun-08	%Change
1 - 19,999 (318)	330,779	297,864	11.1	986,270	931,034	5.9
20,000 - 49,999 (89)	340,500	329,081	3.5	1,187,568	1,163,318	2.1
50,000 + (121)	3,177,351	2,976,464	6.7	14,590,668	14,278,473	2.2
SCOTLAND (528)	3,848,630	3,603,409	6.8	16,764,506	16,372,825	2.4

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 2009/2008 and January-June 2009/2008

Admission Type	June-09	June-08	% Change	Jan-Jun-09	Jan-Jun-08	%Change
Free (226)	2,554,871	2,347,321	8.8	11,950,885	11,622,246	2.8
Paid (302)	1,293,759	1,256,088	3.0	4,813,621	4,750,579	1.3
SCOTLAND (528)	3,848,630	3,603,409	6.8	16,764,506	16,372,825	2.4

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 2009/2008 and January-June 2009/2008

LEC	June-09	June-08	%Change	Jan-Jun-09	Jan-Jun-08	%Change
Argyll & The Islands (31)	85,732	86,631	-1.0	277,626	270,539	2.6
Ayrshire (14)	126,383	116,893	8.1	514,469	485,125	6.0
Borders (31)	55,910	49,713	12.5	206,103	182,726	12.8
Caithness & Sutherland (14)	38,227	36,181	5.7	114,079	113,705	0.3
Dumfries & Galloway (35)	60,294	58,916	2.3	243,343	237,426	2.5
Dunbartonshire (9)	91,867	104,210	-11.8	474,437	523,625	-9.4
Edinburgh & Lothians (68)	773,799	713,693	8.4	3,693,302	3,646,094	1.3
Fife (28)	74,138	67,868	9.2	282,067	280,178	0.7
Forth Valley (29)	190,910	197,946	-3.6	755,609	815,706	-7.4
Glasgow (30)	363,002	396,753	-8.5	2,056,422	2,084,543	-1.3
Grampian (52)	151,419	143,524	5.5	633,131	616,072	2.8
Inverness & East Highland (28)	171,015	154,829	10.5	595,287	551,696	7.9
Lanarkshire (20)	1,107,871	954,521	16.1	5,026,079	4,717,914	6.5
Lochaber (6)	42,155	34,277	23.0	128,195	109,349	17.2
Moray (16)	35,446	33,010	7.4	111,848	107,547	4.0
Orkney (20)	76,168	79,286	-3.9	166,020	174,995	-5.1
Renfrewshire (10)	62,238	60,076	3.6	283,616	274,572	3.3
Shetland (16)	21,693	25,259	-14.1	60,749	65,540	-7.3
Skye & Wester Ross (12)	73,605	65,091	13.1	211,652	202,584	4.5
Tayside (50)	211,217	196,880	7.3	801,644	794,413	0.9
Western Isles (9)	35,541	27,852	27.6	128,828	118,476	8.7
SCOTLAND (528)	3,848,630	3,603,409	6.8	16,764,506	16,372,825	2.4

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 2009.

Reasons for positive impacts on visitor figures:-

Lots of UK visitors
Excellent weather conditions for outdoor attractions
Extended opening hours

Reasons for negative impacts in visitor figures:-

Too hot for indoor attractions
No marketing
Fuel costs
Reduction in school groups

*The levelling off of the visits figures to Shetland Museum and Archives since opening in June 2007 continues to impact on Shetland's overall performance.