



**2009 SCOTTISH VISITOR ATTRACTION BAROMETER
August 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 August 2009 with August 2008. Some 535 attraction operators provided figures for the months of August 2009 with 511 attractions providing comparable visits figures.

2.0 August 2009/2008

Summary

The total number of visits for the responding 511 barometer attractions in Scotland for the period August 2009 was 5,189,729. When compared to data from the previous year of 4,618,433 visits, this shows a visits increase of 10.9%. The total number of visits for responding attractions for January-August 2009 was 26,307,777, when compared to data from the previous year of 25,292,059 this shows a visits increase of 4.0%.

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

Attractions	August-09	August-08	%Change	Jan-Aug-09	Jan-Aug-08	%Change
511	5,189,729	4,681,433	10.9	26,307,777	25,292,059	4.0

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

Attractions	Months	Visits	Months	Visits	%Change
511	Jan-09	1,540,015	Jan-08	1,577,211	-2.4
	Feb-09	1,852,899	Feb-08	1,944,216	-4.7
	Mar-09	2,330,867	Mar-08	2,552,999	-8.7
	Apr-09	3,473,331	Apr-08	3,028,173	14.7
	May-09	3,468,586	May-08	3,486,976	-0.5
	Jun-09	3,792,499	Jun-08	3,559,151	6.6
	Jul-09	4,659,851	Jul-08	4,461,900	4.4
	Aug-09	5,189,729	Aug-08	4,681,433	10.9

The greatest percentage increases in visits recorded by former VisitScotland Areas for August 2009 were experienced by attractions in the Scottish Borders (21.3%) and Shetland Islands (20%). Attractions located in Perthshire and Dumfries & Galloway experienced small decreases in visits of -0.7% and -0.2% respectively.

The greatest percentage increase in visits was recorded by the Country Park/ Forest Park category (24.2%); Distillery sites (14.9%); Church/ Abbey/ Cathedral sites (14.5%); Historic House/ Palace sites (14.2%) and Wildlife/ Zoo/ Farm/ Nature Reserve sites (14.1%). All categories experienced increases comparing August 2009 with August 2008.

Attractions in all locations experienced percentage increases in visits, with Rural located attractions experiencing increases of 14.7%, followed by Seaside (10.2%) and Urban (8.4%) attractions. Attractions of all sizes experienced increases in visits numbers comparing August 2009 with August 2008, with those welcoming between 1 and 19,999 experiencing the greatest increases at 15.1%. Free and Paid admission attractions both experienced increases of 10.9%.

The greatest percentage increases in visits by former LEC area were experienced by attractions in Lanarkshire (28%), Borders (21.3%) and Shetland (20%). Attractions located in Glasgow and Dumfries & Galloway experienced minimal decreases of -0.7% and -0.3% respectively when comparing August 2009 with August 2008.

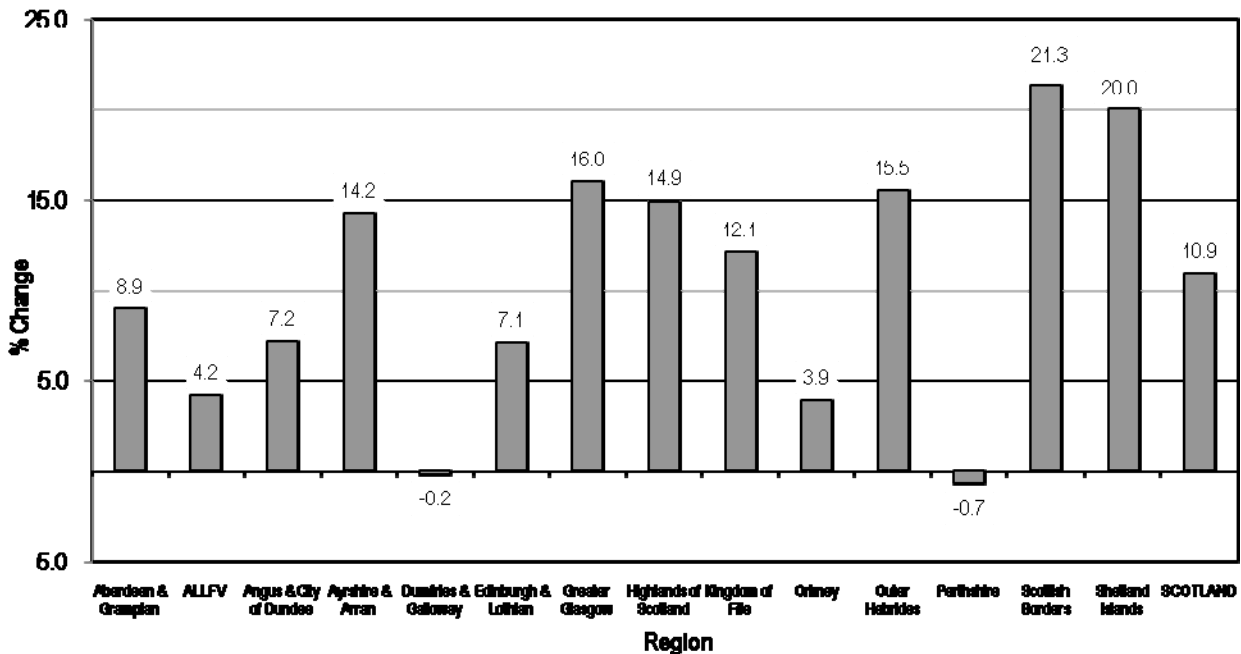
3.0 PERFORMANCE BY FOMER VISITSCOTLAND AREA

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

Area	August-09	August-08	%Change	Jan-Aug-09	Jan-Aug-08	%Change
Aberdeen & Grampian (63)	261,241	239,787	8.9	1,239,154	1,187,987	4.3
ALLFV (62)	441,203	423,553	4.2	1,809,922	1,868,556	-3.1
Angus & City of Dundee (25)	131,745	122,948	7.2	664,851	634,094	4.9
Ayrshire & Arran (18)	152,148	133,220	14.2	844,432	812,128	4.0
Dumfries & Galloway (33)	96,682	96,869	-0.2	384,515	375,887	2.3
Edinburgh & Lothian (65)	1,286,392	1,201,657	7.1	5,969,207	5,752,801	3.8
Greater Glasgow (63)	1,715,669	1,479,518	16.0	11,161,968	10,708,803	4.2
Highlands of Scotland (63)	637,850	555,215	14.9	2,346,997	2,125,884	10.4
Kingdom of Fife (28)	97,418	86,938	12.1	435,970	412,333	5.7
Orkney (20)	119,522	115,069	3.9	390,833	387,703	0.8
Outer Hebrides (8)	43,780	37,916	15.5	220,199	198,774	10.8
Perthshire (20)	101,856	102,588	-0.7	386,245	413,873	-6.7
Scottish Borders (27)	76,293	62,881	21.3	338,227	297,345	13.7
Shetland Islands (16)	27,930	23,274	20.0	115,257	115,891	-0.5
SCOTLAND (511)	5,189,729	4,681,433	10.9	26,307,777	25,292,059	4.0

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

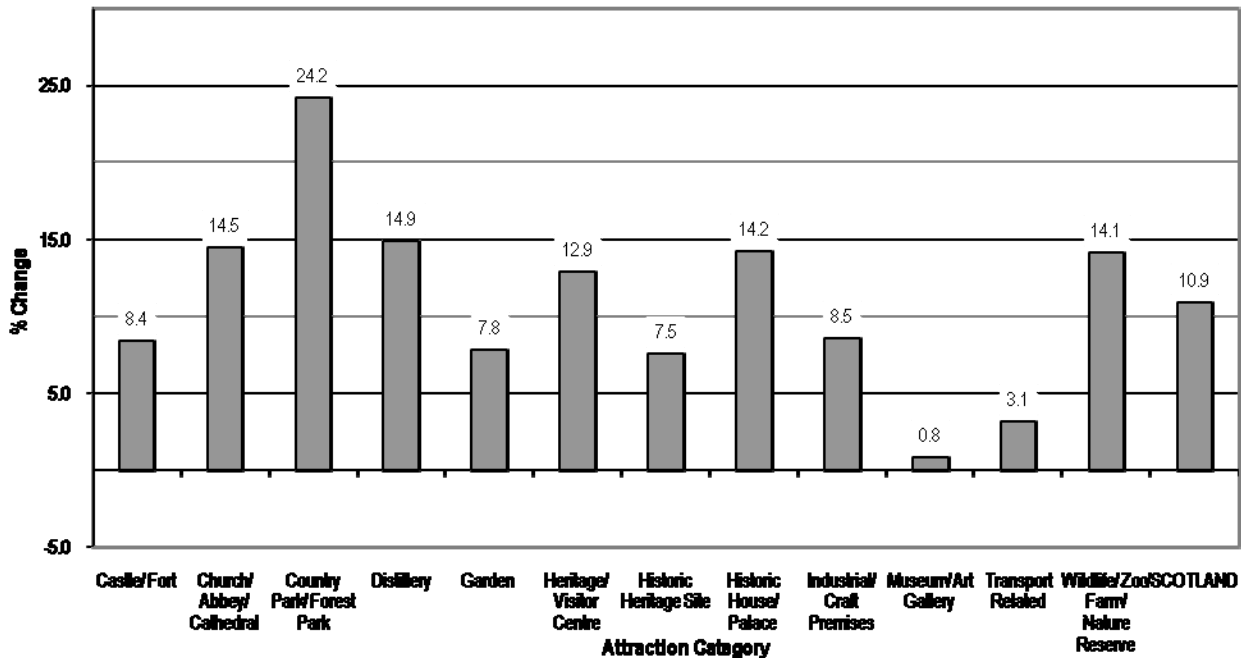
Performance by VisitScotland Area August 2009/2008



4.0 PERFORMANCE BY ATTRACTION CATEGORY

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

Category	August-09	August-08	% Change	Jan-Aug-09	Jan-Aug-08	% Change
Castle/ Fort (59)	753,261	695,131	8.4	2,832,982	2,763,570	2.5
Church/ Abbey/ Cathedral (19)	262,452	229,295	14.5	1,034,210	935,240	10.6
Country Park / Forest Park (13)	1,211,454	975,472	24.2	8,176,663	7,627,872	7.2
Distillery (25)	139,335	121,302	14.9	458,091	420,981	8.8
Garden (24)	121,003	112,279	7.8	652,854	627,292	4.1
Heritage/ Visitor Centre (83)	757,537	671,078	12.9	3,484,516	3,400,050	2.5
Historic Heritage Site (36)	147,144	136,833	7.5	520,964	508,536	2.4
Historic House/ Palace (38)	116,143	101,687	14.2	454,158	433,153	4.8
Industrial/ Craft Premises (10)	13,629	12,558	8.5	60,076	60,969	-1.5
Museum/ Art Gallery (171)	1,279,181	1,269,282	0.8	6,829,292	6,798,122	0.5
Transport Related (10)	171,018	165,811	3.1	753,011	732,003	2.9
Wildlife/ Zoo/ Farm/ Nature Reserve (23)	217,572	190,705	14.1	1,050,960	984,271	6.8
SCOTLAND (511)	5,189,729	4,681,433	10.9	26,307,777	25,292,059	4.0

Performance by Attraction Category August 2009/2008

5.0 PERFORMANCE BY LOCATION

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

Location	August-09	August-08	% Change	Jan-Aug-09	Jan-Aug-08	%Change
Rural (225)	1,987,725	1,732,233	14.7	9,989,273	9,580,450	4.3
Seaside (67)	395,721	359,254	10.2	1,582,857	1,486,949	6.5
Urban (219)	2,806,283	2,589,946	8.4	14,735,647	14,224,660	3.6
SCOTLAND (511)	5,189,729	4,681,433	10.9	26,307,777	25,292,059	4.0

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

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – August 2009/2008 and January-August 2009/2008

Volume of Visits	August-09	August-08	% Change	Jan-Aug-09	Jan-Aug-08	%Change
1 - 19,999 (309)	502,465	436,712	15.1	1,912,567	1,768,298	8.2
20,000 - 49,999 (86)	534,104	487,543	9.6	2,213,049	2,131,751	3.8
50,000 + (116)	4,153,160	3,757,178	10.5	22,182,161	21,392,010	3.7
SCOTLAND (511)	5,189,729	4,681,433	10.9	26,307,777	25,292,059	4.0

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 – August 2009/2008 and January-August 2009/2008

Admission Type	August-09	August-08	% Change	Jan-Aug-09	Jan-Aug-08	%Change
Free (212)	3,175,245	2,864,381	10.9	17,798,646	17,115,947	4.0
Paid (299)	2,014,484	1,817,052	10.9	8,509,131	8,176,112	4.1
SCOTLAND (511)	5,189,729	4,681,433	10.9	26,307,777	25,292,059	4.0

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 – August 2009/2008 and January-August 2009/2008

LEC	August-09	August-08	%Change	Jan-Aug-09	Jan-Aug-08	%Change
Argyll & The Islands (32)	151,475	139,361	8.7	566,463	543,182	4.3
Ayrshire (17)	145,087	125,599	15.5	823,438	785,774	4.8
Borders (27)	76,293	62,881	21.3	338,227	297,345	13.7
Caithness & Sutherland (14)	63,668	59,099	7.7	230,057	225,938	1.8
Dumfries & Galloway (32)	96,188	96,451	-0.3	382,582	374,320	2.2
Dunbartonshire (9)	126,589	119,393	6.0	708,888	759,196	-6.6
Edinburgh & Lothians (65)	1,286,392	1,201,657	7.1	5,969,207	5,752,801	3.8
Fife (28)	97,418	86,938	12.1	435,970	412,333	5.7
Forth Valley (28)	321,077	320,085	0.3	1,356,498	1,427,475	-5.0
Glasgow (31)	458,169	461,483	-0.7	2,983,958	3,018,614	-1.1
Grampian (50)	209,993	194,162	8.2	1,066,496	1,030,832	3.5
Inverness & East Highland (27)	296,054	251,237	17.8	1,138,974	1,020,084	11.7
Lanarkshire (18)	1,039,509	812,114	28.0	6,958,767	6,465,603	7.6
Lochaber (7)	62,374	56,087	11.2	247,186	219,214	12.8
Moray (15)	55,638	51,526	8.0	189,804	176,833	7.3
Orkney (20)	119,522	115,069	3.9	390,833	387,703	0.8
Renfrewshire (10)	67,581	59,770	13.1	423,624	396,242	6.9
Shetland (16)	27,930	23,274	20.0	115,257	115,891	-0.5
Skye & Wester Ross (12)	204,432	176,131	16.1	684,223	610,890	12.0
Tayside (45)	240,560	231,200	4.0	1,077,126	1,073,015	0.4
Western Isles (8)	43,780	37,916	15.5	220,199	198,774	10.8
SCOTLAND (511)	5,189,729	4,681,433	10.9	26,307,777	25,292,059	4.0

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 August 2009.

Reasons for positive impacts on visitor figures:-

Homecoming 2009
Continued increase in UK visitors
More local visitors
More coaches
Clan gatherings
Increase in spending from strong Euro
Popular exhibition

Reasons for negative impacts in visitor figures:-

Wet weather
Fuel costs
Local competition
Roadworks
Reduced opening hours