

2009 SCOTTISH VISITOR ATTRACTION BAROMETER September 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 September 2009 with September 2008. Some 532 attraction operators provided figures for the months of September 2009 with 512 attractions providing comparable visits figures.

2.0 September 2009/2008

Summary

The total number of visits for the responding 512 barometer attractions in Scotland for the period September 2009 was 3,155,019. When compared to data from the previous year of 3,158,613 visits, this shows a visits decrease of -0.1%. The total number of visits for responding attractions for January-September 2009 was 28,884,167, when compared to data from the previous year of 27,927,677 this shows a visits increase of 3.4%.

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

Attractions	September-09	September-08	%Change	Jan-Sep-09	Jan-Sep-08	%Change
512	3,155,019	3,158,613	-0.1	28,884,167	27,927,677	3.4

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

Attractions	Months	Visits	Months	Visits	%Change
512	Jan-09	1,512,728	Jan-08	1,563,208	-3.2
	Feb-09	1,810,798	Feb-08	1,886,106	-4.0
	Mar-09	2,274,263	Mar-08	2,477,657	-8.2
	Apr-09	3,365,139	Apr-08	2,954,014	13.9
	May-09	3,390,282	May-08	3,392,520	-0.1
	Jun-09	3,722,704	Jun-08	3,490,134	6.7
	Jul-09	4,559,282	Jul-08	4,353,696	4.7
	Aug-09	5,093,952	Aug-08	4,651,729	9.5
	Sep-09	3,155,019	Sep-08	3,158,613	-0.1

The greatest percentage increase in visits recorded by former VisitScotland Area for September 2009 was experienced by attractions located in the Scottish Borders (29.2%) and Shetland Islands (16.3%). Greater Glasgow experienced the greatest decline in visits over the same period with decreases of -9.0%.

During this period the greatest percentage increase in visits was recorded by the Heritage/ Visitor Centre category (8.4%) followed by Castle/ Fort sites (7.0%) and Distillery sites (6.3%). The greatest decreases in visits were experienced by attractions in the Country Park/ Forest Park category at -12.0%, and Industrial/ Craft Premises sites (-3.5%).

Attractions in Urban and Seaside locations experienced increases in visits of 5.4% and 3.4% respectively; whilst attractions in Rural locations experienced decreases of -7.6% in visits. Attractions welcoming between 1 and 19,999 visits experienced the greatest increase in visits of 11.3%, followed by those welcoming between 20,000 and 49,999 with increases of 4.6%. Those attractions welcoming more than 50,000 visits experienced decreases of -1.7% when comparing September 2009 with September 2008.

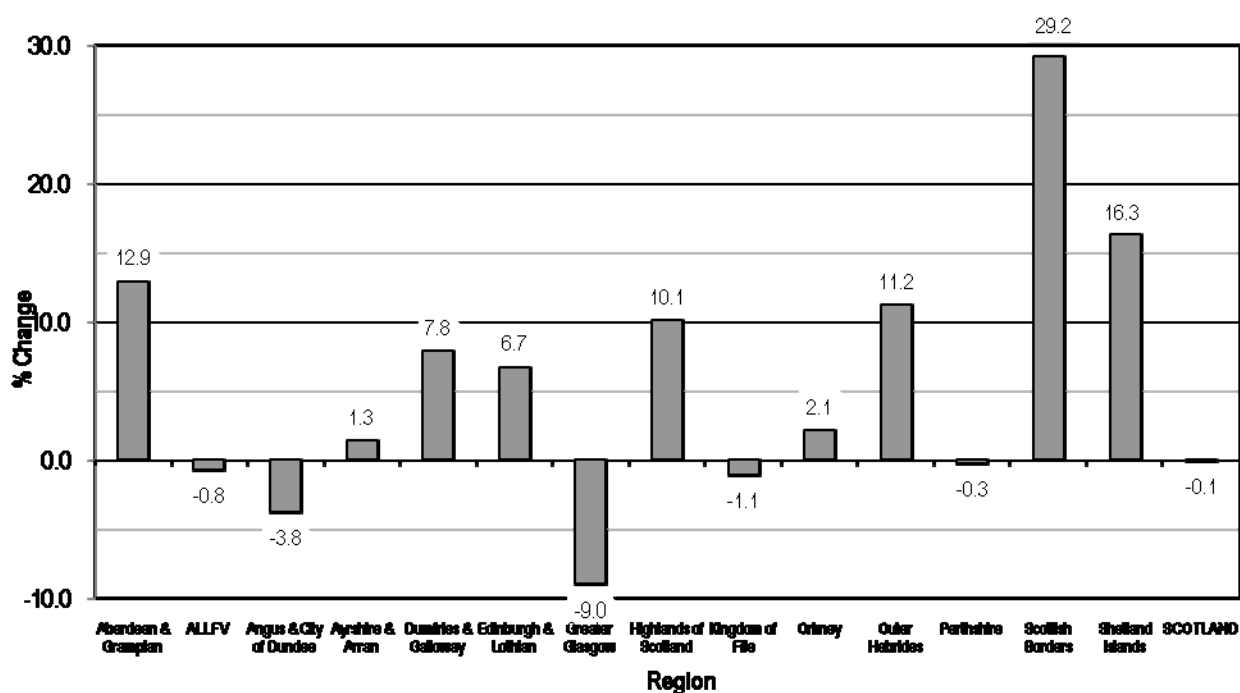
Paid admission attractions experienced increases of 5.7%, whilst Free admission attractions experienced decreases of -3.1%. The greatest increases in visits by former LEC area were experienced by attractions in Borders (29.2%), Renfrewshire (22.1%) and Inverness & East Highland (18.1%). Lanarkshire experienced the greatest decrease of -15.2% followed by Forth Valley (-5.1%) when comparing September 2009 with September 2008.

3.0 PERFORMANCE BY FOMER VISITSCOTLAND AREA

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

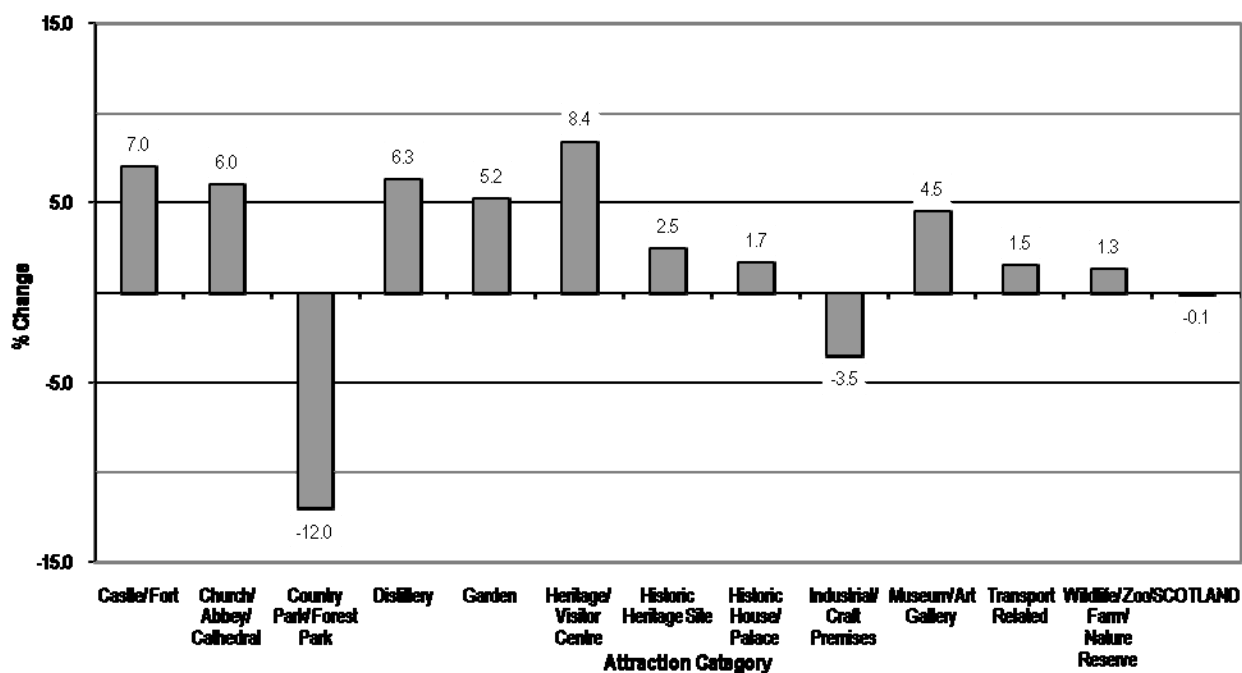
Area	September-09	September-08	%Change	Jan-Sep-09	Jan-Sep-08	%Change
Aberdeen & Grampian (61)	152,099	134,726	12.9	1,380,222	1,299,732	6.2
ALLFV (62)	212,600	214,213	-0.8	1,788,684	1,858,333	-3.7
Angus & City of Dundee (27)	94,315	98,050	-3.8	920,838	891,286	3.3
Ayrshire & Arran (21)	100,733	99,393	1.3	1,066,081	1,025,825	3.9
Dumfries & Galloway (34)	55,168	51,163	7.8	465,193	450,460	3.3
Edinburgh & Lothian (65)	760,756	712,973	6.7	6,844,615	6,599,206	3.7
Greater Glasgow (57)	1,174,433	1,290,287	-9.0	11,445,723	11,154,221	2.6
Highlands of Scotland (64)	330,148	299,869	10.1	2,725,090	2,475,520	10.1
Kingdom of Fife (26)	54,391	55,011	-1.1	482,916	460,654	4.8
Orkney (20)	50,006	48,958	2.1	440,839	436,661	1.0
Outer Hebrides (8)	29,500	26,535	11.2	249,699	225,309	10.8
Perthshire (22)	74,529	74,738	-0.3	553,771	583,886	-5.2
Scottish Borders (29)	50,576	39,144	29.2	389,474	337,140	15.5
Shetland Islands (16)	15,765	13,553	16.3	131,022	129,444	1.2
SCOTLAND (512)	3,155,019	3,158,613	-0.1	28,884,167	27,927,677	3.4

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

Performance by VisitScotland Area September 2009/2008

4.0 PERFORMANCE BY ATTRACTION CATEGORY

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

Category	September-09	September-08	% Change	Jan-Sep-09	Jan-Sep-08	% Change
Castle/ Fort (59)	375,689	351,114	7.0	3,208,671	3,114,684	3.0
Church/ Abbey/ Cathedral (19)	143,332	135,216	6.0	1,169,353	1,065,770	9.7
Country Park / Forest Park (12)	865,706	984,076	-12.0	8,558,251	8,188,650	4.5
Distillery (31)	89,896	84,580	6.3	633,587	592,186	7.0
Garden (25)	80,430	76,446	5.2	743,684	713,388	4.2
Heritage/ Visitor Centre (81)	411,385	379,484	8.4	3,550,847	3,404,073	4.3
Historic Heritage Site (37)	73,793	72,020	2.5	599,572	583,251	2.8
Historic House/ Palace (38)	64,083	63,026	1.7	518,241	496,179	4.4
Industrial/ Craft Premises (13)	12,587	13,045	-3.5	116,639	115,724	0.8
Museum/ Art Gallery (166)	817,763	782,363	4.5	7,728,120	7,695,534	0.4
Transport Related (9)	122,430	120,610	1.5	865,224	842,169	2.7
Wildlife/ Zoo/ Farm/ Nature Reserve (22)	97,925	96,633	1.3	1,191,978	1,116,069	6.8
SCOTLAND (512)	3,155,019	3,158,613	-0.1	28,884,167	27,927,677	3.4

Performance by Attraction Category September 2009/2008

5.0 PERFORMANCE BY LOCATION

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

Location	September-09	September-08	% Change	Jan-Sep-09	Jan-Sep-08	%Change
Rural (229)	1,205,506	1,305,098	-7.6	11,229,706	10,925,039	2.8
Seaside (67)	202,366	195,793	3.4	1,767,249	1,664,124	6.2
Urban (216)	1,747,147	1,657,722	5.4	15,887,212	15,338,514	3.6
SCOTLAND (512)	3,155,019	3,158,613	-0.1	28,884,167	27,927,677	3.4

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

6.0 PERFORMANCE BY VOLUME OF VISITS

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

Volume of Visits	September-09	September-08	% Change	Jan-Sep-09	Jan-Sep-08	%Change
1 - 19,999 (310)	284,268	255,450	11.3	2,194,099	2,020,653	8.6
20,000 - 49,999 (86)	301,937	288,609	4.6	2,484,174	2,378,898	4.4
50,000 + (116)	2,568,814	2,614,554	-1.7	24,205,894	23,528,126	2.9
SCOTLAND (512)	3,155,019	3,158,613	-0.1	28,884,167	27,927,677	3.4

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 – September 2009/2008 and January-September 2009/2008

Admission Type	September-09	September-08	% Change	Jan-Sep-09	Jan-Sep-08	%Change
Free (211)	2,034,136	2,098,312	-3.1	19,129,702	18,564,700	8.5
Paid (301)	1,120,883	1,060,301	5.7	9,754,465	9,362,977	14.0
SCOTLAND (512)	3,155,019	3,158,613	-0.1	28,884,167	27,927,677	3.4

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 – September 2009/2008 and January-September 2009/2008

LEC	September-09	September-08	%Change	Jan-Sep-09	Jan-Sep-08	%Change
Argyll & The Islands (33)	73,169	71,674	2.1	586,690	569,038	3.1
Ayrshire (20)	98,081	95,580	2.6	1,042,435	995,658	4.7
Borders (29)	50,576	39,144	29.2	389,474	337,140	15.5
Caithness & Sutherland (13)	35,811	36,263	-1.2	262,745	260,797	0.7
Dumfries & Galloway (33)	54,772	50,757	7.9	462,864	448,487	3.2
Dunbartonshire (9)	88,108	85,398	3.2	796,996	844,594	-5.6
Edinburgh & Lothians (65)	760,756	712,973	6.7	6,844,615	6,599,206	3.7
Fife (26)	54,391	55,011	-1.1	482,916	460,654	4.8
Forth Valley (26)	108,137	113,966	-5.1	913,353	982,856	-7.1
Glasgow (30)	343,163	343,433	-0.1	3,290,036	3,307,722	-0.5
Grampian (46)	123,096	107,743	14.2	1,139,506	1,078,380	5.7
Inverness & East Highland (27)	151,743	128,443	18.1	1,255,700	1,109,351	13.2
Lanarkshire (13)	718,087	846,589	-15.2	7,164,970	6,863,573	4.4
Lochaber (8)	40,540	42,088	-3.7	372,624	351,006	6.2
Moray (17)	34,073	31,019	9.8	263,639	245,289	7.5
Orkney (20)	50,006	48,958	2.1	440,839	436,661	1.0
Renfrewshire (11)	59,807	48,974	22.1	512,108	483,258	6.0
Shetland (16)	15,765	13,553	16.3	131,022	129,444	1.2
Skye & Wester Ross (12)	92,860	84,801	9.5	777,083	695,691	11.7
Tayside (50)	172,578	175,711	-1.8	1,504,853	1,503,563	0.1
Western Isles (8)	29,500	26,535	11.2	249,699	225,309	10.8
SCOTLAND (512)	3,155,019	3,158,613	-0.1	28,884,167	27,927,677	3.4

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 September 2009.

Reasons for positive impacts on visitor figures:-

Doors Open Day
Clan gatherings
Popular exhibition
Better weather
New Sunday sailings

Reasons for negative impacts in visitor figures:-

Fuel costs
Local competition
Roadworks
Reduced opening hours

*Strathclyde Country Park, one of the most visited participating attractions in Scotland, seemed to experienced a reduction in visits numbers comparing September 2009 with September 2008; this was largely due to methods of collecting visits figures which resulted in a shorter collation period for September 2009 compared with September 2008. This has impacted on the overall trends for visits for September. Omitting Strathclyde Country Park would give a visits increase of +6% for September 2009.