

SCOTTISH VISITOR ATTRACTION BAROMETER REPORT:

January - April 2010/09 REPORT

This report should be quoted as:

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1.0 INTRODUCTION JANUARY-APRIL 2010/2009

Welcome to the first Moffat Centre Visitor Attraction Barometer covering the Early Season from January to April 2010. The Barometer continues to review visitor attraction performance throughout Scotland, highlighting trends across various sectors and categories of the industry as requested by attraction operators. Further comments and feedback should be directed to Marina Martinolli (Tel: 0141 331 8404, Fax: 0141 331 8411, E-mail: mma4@gcu.ac.uk).

This Barometer compares the period of January-April 2010 with January-April 2009. Some 525 attraction operators provided figures for the months of January-April 2010 with 502 attractions providing comparable visits figures.

The total number of visits for the responding 502 barometer attractions in Scotland for the period January-April 2010 was 6,189,953. When compared to data from the previous year of 6,491,501 visits, this shows a visits decrease of -4.6%. The total number of visits for responding attractions for the month of April was 2,455,484 when compared to data from the previous year of 2,614,887 this shows a visits decrease of -6.1%.

The following table shows total visits recorded for April 2010/2009 and January-April 2010/2009 as well as the % change calculation.

Attractions	Apr-10	Apr-09	%Change	Jan-Apr-10	Jan-Apr-09	%Change
502	2,455,484	2,614,887	-6.1	6,189,953	6,491,501	-4.6

A further breakdown is shown below, where the visits during the individual months of January-April 2010 can be compared with January-April 2009 with their % change calculations.

Attractions	Months	Visits	Months	Visits	%Change
502	Jan-10	947,505	Jan-09	1,057,321	-10.4
	Feb-10	1,274,731	Feb-09	1,252,961	1.7
	Mar-10	1,512,233	Mar-09	1,566,332	-3.5
	Apr-10	2,455,484	Apr-09	2,614,887	-6.1

Commentary

The disappointing performance of visitor attractions over the Easter 2010 period has to be set against a very difficult operating environment. The -4.6% overall decline on 2009 is occurring at a time of unprecedented economic downturn and uncertainty in many of our generating markets. Currency fluctuations are increasingly erratic with problems in the Eurozone creating concerns for stability of the Euro in relationship to other currencies. Feedback from visitor attraction operators highlights the following additional impacts:

- Volcanic ash eruptions from the Icelandic volcano disrupted travel across Europe during the critical month of April 2010 (this resulted in cancellation/alteration of travel and holiday plans in many generating markets). It is interesting that rail, coach and ferry operators all recorded an increase in demand
- The prospect of further industrial action by British Airways staff during April and beyond has and will continue to impact on travel activity and plans
- Earlier in 2010 heavy snow fall during January/ February impacted negatively on visitor figures of some all year operators; indeed, many attraction operators in both rural and urban areas were forced to close or limit opening hours. However Scotland's ski industry has seen an exceptional period of trading with skiing in the Cairngorms continuing into June 2010.
- Once again poor Easter weather impacted on admissions at many sites and contributed to the -6.1 % decline for the month of April 2010.

As lead time for booking continues to shorten and forecasters struggle to ascertain demand for the summer it becomes increasingly difficult to anticipate volumes. We will continue to monitor the situation and feedback with frequent updates of how to proceed in what looks to be a challenging year ahead.

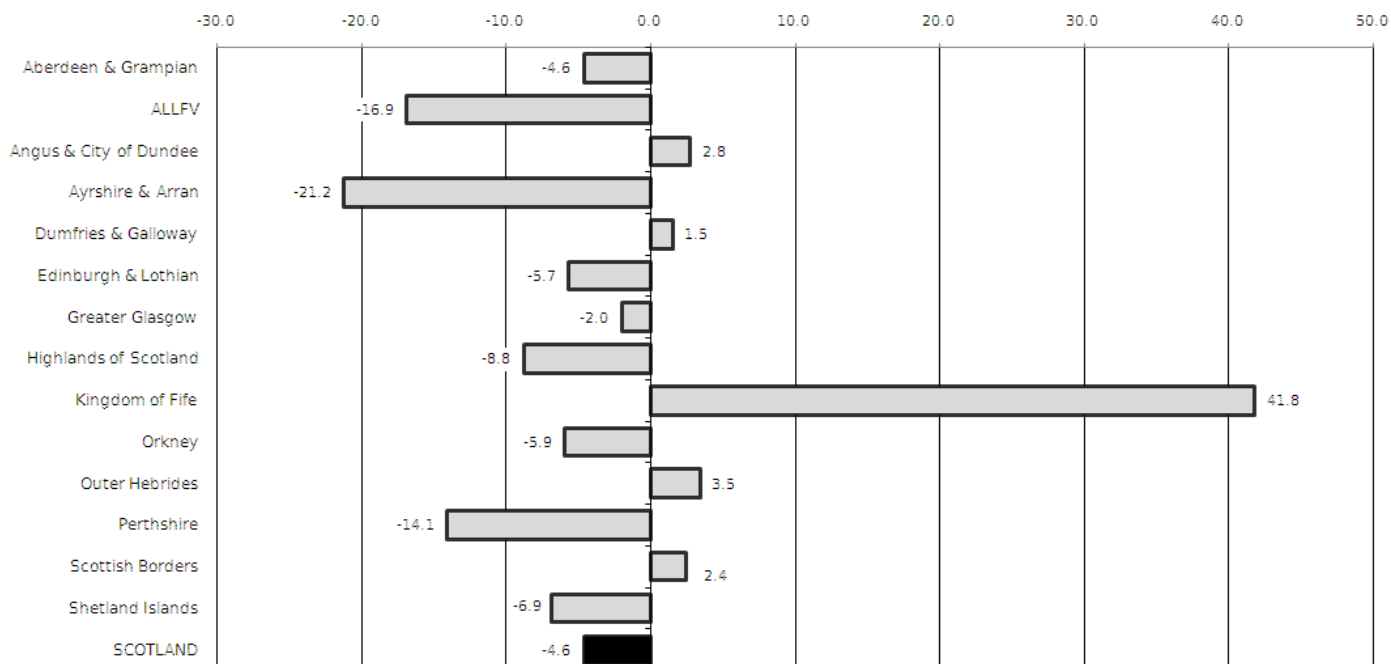
2.0 PERFORMANCE TABLES & GRAPHS

Performance by Former VisitScotland Area – April 2010/2009 and January-April 2010/2009

Area	Apr-10	Apr-09	%Change	Jan-Apr-10	Jan-Apr-09	%Change
Aberdeen & Grampian (56)	121,803	130,154	-6.4	289,580	303,661	-4.6
ALLFV (60)	179,252	214,489	-16.4	331,893	399,426	-16.9
Angus & City of Dundee (28)	115,331	108,906	5.9	265,546	258,438	2.8
Ayrshire & Arran (19)	108,531	128,968	-15.8	241,952	307,120	-21.2
Dumfries & Galloway (37)	75,115	72,541	3.5	114,052	112,359	1.5
Edinburgh & Lothian (56)	645,855	737,321	-12.4	1,851,545	1,962,473	-5.7
Greater Glasgow (64)	764,966	783,339	-2.3	2,173,698	2,217,396	-2.0
Highlands of Scotland (59)	196,657	219,389	-10.4	412,289	452,067	-8.8
Kingdom of Fife (25)	82,208	48,646	69.0	145,533	102,627	41.8
Orkney (22)	24,491	26,568	-7.8	40,216	42,747	-5.9
Outer Hebrides (8)	23,991	23,348	2.8	67,215	64,966	3.5
Perthshire (23)	44,542	52,368	-14.9	82,081	95,521	-14.1
Scottish Borders (26)	64,145	60,441	6.1	148,655	145,103	2.4
Shetland Islands (19)	8,597	8,409	2.2	25,698	27,597	-6.9
SCOTLAND (502)	2,455,484	2,614,887	-6.1	6,189,953	6,491,501	-4.6

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

Performance by Former VisitScotland Area January - April 2010/2009



Performance by Location (Accessibility & Density) – April 2010/2009 and January-April 2010/2009

Location – accessibility/density	Apr-10	Apr-09	% Change	Jan-Apr-10	Jan-Apr-09	%Change
Large Urban Areas (82)	1,153,854	1,291,934	-10.7	3,397,771	3,673,362	-7.5
Other Urban Areas (85)	437,401	450,033	-2.8	1,014,789	1,095,431	-7.4
Accessible Small Towns (30)	28,640	27,786	3.1	51,549	50,792	1.5
Remote Small Towns (39)	118,560	121,341	-2.3	253,147	274,375	-7.7
Accessible Rural (101)	377,384	345,127	9.3	835,945	713,420	17.2
Remote Rural (165)	339,645	378,666	-10.3	636,752	684,121	-6.9
SCOTLAND (502)	2,455,484	2,614,887	-6.1	6,189,953	6,491,501	-4.6

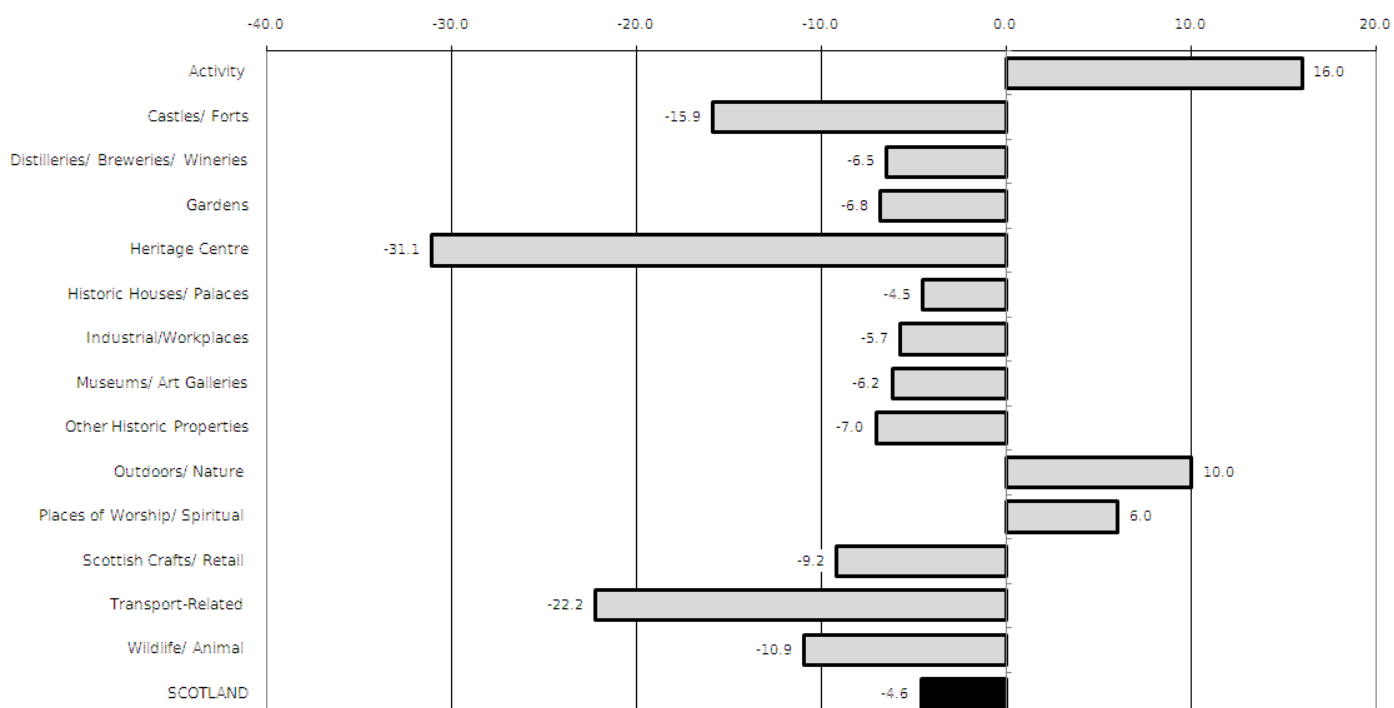
Performance by Location (Geographic) – April 2010/2009 and January-April 2010/2009

Location - geographic	Apr-10	Apr-09	% Change	Jan-Apr-10	Jan-Apr-09	%Change
Rural (235)	564,625	615,478	-8.3	1,109,273	1,221,638	-9.2
Seaside (70)	165,443	170,427	-2.9	349,797	374,166	-6.5
Urban (197)	1,725,416	1,828,982	-5.7	4,730,883	4,895,697	-3.4
SCOTLAND (502)	2,455,484	2,614,887	-6.1	6,189,953	6,491,501	-4.6

Performance by Attraction Category – April 2010/2009 and January-April 2010/2009

Category	Apr-10	Apr-09	% Change	Jan-Apr-10	Jan-Apr-09	%Change
Activity Attractions (4)	39,596	40,133	-1.3	102,848	88,668	16.0
Castles/Forts (54)	212,932	286,245	-25.6	482,079	573,151	-15.9
Distilleries/Breweries/Wineries (34)	62,903	74,662	-15.7	152,302	162,820	-6.5
Gardens (26)	75,895	82,494	-8.0	189,726	203,576	-6.8
Heritage Centres (22)	49,467	66,940	-26.1	113,645	164,972	-31.1
Historic Houses/Palaces (36)	81,099	82,909	-2.2	123,262	129,078	-4.5
Industrial/Workplaces (6)	28,674	34,388	-16.6	101,425	107,580	-5.7
Museums/Art Galleries (178)	853,217	896,453	-4.8	2,485,447	2,648,440	-6.2
Other Historic Properties (55)	84,553	90,373	-6.4	177,150	190,584	-7.0
Outdoors/Nature Attractions (34)	553,380	517,857	6.9	1,393,856	1,266,864	10.0
Places of Worship/Spiritual Attractions (19)	95,836	97,226	-1.4	250,168	235,908	6.0
Scottish Crafts/Retail Attractions (4)	27,140	28,086	-3.4	66,594	73,316	-9.2
Transport-Related Attractions (5)	90,057	101,713	-11.5	168,754	216,934	-22.2
Wildlife/Animal Attractions (25)	200,735	215,408	-6.8	382,697	429,610	-10.9
SCOTLAND (502)	2,455,484	2,614,887	-6.1	6,189,953	6,491,501	-4.6

Performance by Attraction Category January - April 2010/2009



Performance by Volume of Visits – April 2010/2009 and January-April 2010/2009

Volume of Visits	Apr-10	Apr-09	% Change	Jan-Apr-10	Jan-Apr-09	%Change
0 - 4,999 (143)	20,573	22,475	-8.5	29,812	32,287	-7.7
5,000 - 9,999 (78)	43,699	48,721	-10.3	72,187	74,922	-3.7
10,000 - 19,999 (91)	101,038	111,900	-9.7	188,991	204,247	-7.5
20,000 - 49,999 (87)	231,275	249,534	-7.3	443,825	468,779	-5.3
50,000 - 99,999 (44)	310,637	280,419	10.8	623,895	628,774	-0.8
100,000 + (59)	1,748,262	1,901,838	-8.1	4,831,243	5,082,492	-4.9
SCOTLAND (502)	2,455,484	2,614,887	-6.1	6,189,953	6,491,501	-4.6

Performance by Admission Type – April 2010/2009 and January-April 2010/2009

Admission	Apr-10	Apr-09	% Change	Jan-Apr-10	Jan-Apr-09	%Change
Free (196)	1,509,106	1,521,255	-0.8	4,211,129	4,263,587	-1.2
Paid (306)	946,378	1,093,632	-13.5	1,978,824	2,227,914	-11.2
SCOTLAND (502)	2,455,484	2,614,887	-6.1	6,189,953	6,491,501	-4.6

Performance by Council Area– April 2010/2009 and January-April 2010/2009

Council Area	Apr-10	Apr-09	%Change	Jan-Apr-10	Jan-Apr-09	%Change
Aberdeen City(8)	62,923	67,582	-6.9	200,453	207,195	-3.3
Aberdeenshire(29)	39,889	45,431	-12.2	62,017	72,575	-14.5
Angus(21)	88,577	86,005	3.0	211,767	198,732	6.6
Argyll & Bute(35)	54,662	64,149	-14.8	84,628	100,435	-15.7
Dumfries & Galloway(37)	75,115	72,541	3.5	114,052	112,359	1.5
Dundee City(7)	27,759	24,000	15.7	56,074	62,169	-9.8
East Ayrshire(7)	46,066	48,028	-4.1	117,235	128,211	-8.6
East Dunbartonshire(2)	1,057	2,177	-51.4	4,736	5,859	-19.2
East Lothian(13)	46,605	52,064	-10.5	102,720	118,006	-13.0
Edinburgh, City of(30)	566,509	647,652	-12.5	1,677,613	1,761,489	-4.8
Eilean Siar(8)	23,991	23,348	2.8	67,215	64,966	3.5
Falkirk(4)	52,510	62,004	-15.3	83,100	116,781	-28.8
Fife(23)	79,978	45,507	75.7	142,013	98,124	44.7
Glasgow City(28)	380,862	427,579	-10.9	1,121,975	1,282,792	-12.5
Highland(56)	193,902	216,173	-10.3	409,426	448,851	-8.8
Inverclyde(5)	9,812	9,505	3.2	22,494	21,988	2.3
Midlothian(4)	12,569	16,142	-22.1	31,744	38,130	-16.7
Moray(22)	21,746	20,357	6.8	29,973	27,107	10.6
North Ayrshire(6)	8,054	10,774	-25.2	12,851	19,228	-33.2
North Lanarkshire(3)	111,780	117,560	-4.9	327,540	338,277	-3.2
Orkney Islands(22)	24,491	26,568	-7.8	40,216	42,747	-5.9
Perth & Kinross(24)	44,220	51,776	-14.6	81,646	92,929	-12.1
Renfrewshire(6)	46,225	47,930	-3.6	128,115	149,703	-14.4
Scottish Borders(26)	64,145	60,441	6.1	148,655	145,103	2.4
Shetland Islands(19)	8,597	8,409	2.2	25,698	27,597	-6.9
South Ayrshire(6)	54,411	70,166	-22.5	111,866	159,681	-29.9
South Lanarkshire(19)	215,155	178,101	20.8	567,910	417,363	36.1
Stirling(18)	70,985	87,178	-18.6	161,042	181,084	-11.1
West Dunbartonshire(4)	1,744	2,525	-30.9	4,738	5,420	-12.6
West Lothian(10)	21,145	23,215	-8.9	40,441	46,600	-13.2
SCOTLAND (502)	2,455,484	2,614,887	-6.1	6,189,953	6,491,501	-4.6

3.0 SUMMARY

The greatest percentage increase in visits recorded by former VisitScotland Area for January- April 2010 was experienced by Kingdom of Fife (41.8%). The following areas also experienced small increases in visits: Outer Hebrides (3.5%), Angus & City of Dundee (2.8%), Scottish Borders (2.4%) and Dumfries & Galloway (1.5%). Ayrshire & Arran experienced the greatest decline in percentage of visits over the same period with decreases of -21.2%. Argyll, Loch Lomond & Forth Valley and Perthshire experienced decreases in visits figures of -16.9% and -14.1% respectively.

During this period the greatest percentage increase in visits was recorded by the Activity Attractions category (16.0%) followed by Outdoors/ Nature Attractions (10.0%). The greatest decreases in visits were experienced by attractions in the Heritage Centre category at -31.1% and Transport Related Attractions at -22.2% when comparing January – April 2010 with January – April 2009.

Attractions located in Accessible Rural areas and Accessible Small Towns experienced increases in visits of 17.2% and 1.5% respectively; whilst visits to attractions in all other locations experienced decreases. Attractions of all sizes experienced decreases in visits numbers when comparing January-April 2010 with January-April 2009, with those welcoming between 0 and 4,999 experiencing the greatest decrease at -7.7%.

Both Free and Paid admission attractions experienced decreases of -1.2% and -11.2% respectively. The greatest increases in visits by Council Area were experienced by attractions in Fife (44.7%) and South Lanarkshire (36.1%). Attractions in North Ayrshire experienced the greatest decrease of -33.2% followed by South Ayrshire (-29.9%) and Falkirk (-28.8%) when comparing January-April 2010 with January-April 2009.

4.0 NOTES OF IMPORTANCE

- Jack Vettriano exhibition at Kirkcaldy Museum and Art Gallery positively impacted on visit figures for March and April for Fife.
- National Galleries of Edinburgh (Edinburgh sites) are counted as one attraction for the purposes of the Visitor Attraction Barometer. They include the National Gallery Complex, The Scottish National Portrait Gallery and The Scottish National Gallery of Modern Art.