

**2008 SCOTTISH VISITOR ATTRACTION BAROMETER
January - April 2008 REPORT**

Commissioned by VisitScotland

 Conducted by the Moffat Centre for Travel and Tourism
 Business Development, Cultural Business Group, 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 January-April 2008 with January-April 2007. Some 543 attraction operators provided figures for the months of January-April 2008 with 523 attractions providing comparable visits figures. Easter fell during March 2008 therefore comparisons are also drawn between March 2008 and March 2007 as well as April 2008 and April 2007.

2.0 January-April 2008/2007
Summary

The total number of visits for the responding 523 barometer attractions in Scotland for the period January-April 2008 was **9,033,603**. When compared to data from the previous year of **9,249,468** visits, this shows a visits decrease of **-2.3%**. The total number of visits for responding attractions for the month of April was **2,974,282**, when compared to data from the previous year of **3,489,797** this shows a visits decrease of **-14.8%**. Easter fell during March 2008 influencing a visits increase of **18.3%** when comparing visits figures of **2,507,390** with **2,118,942** visits in March 2007.

*The re-opening of Kelvingrove Museum and Art Gallery in July 2006 continues to have a significant effect in shaping performance for the first part of 2008. The opening of Shetland Museum and Archives in June 2007 has positively impacted on performance for Shetland.

The following table shows total visits recorded for January-April 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	Jan-Apr08	Jan-Apr07	%Change
523	9,033,603	9,249,468	-2.3
*522 (excl. Kelvingrove)	8,581,004	8,477,846	1.2

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

Attractions	Months		Months		%Change
	Months	Visits	Months	Visits	
523	Jan-08	1,588,881	Jan-07	1,692,365	-6.1
	Feb-08	1,962,850	Feb-07	1,948,364	0.7
	Mar-08	2,507,390	Mar-07	2,118,942	18.3
	Apr-08	2,974,482	Apr-07	3,489,797	-14.8

The greatest increase in visits recorded by VisitScotland Region for January-April 2008 was experienced by Shetland Islands (1,102.6%) reflecting the opening of Shetland Museum and Archives in June 2007 and Orkney (53.2%). Scottish Borders experienced the greatest decline in visits over the same period with decreases of -14.0%. Outer Hebrides and Argyll, Loch Lomond and Forth Valley (ALLFV) also experienced decreases in visits figures of -8.2% and -8.1% respectively.

During this period the greatest increase in visits was recorded by the Transport Related category (13.6%) followed by Distillery sites (10.3%) and Church/Abbey/ Cathedral sites (9.2%). The Wildlife/ Zoo/ Farm/ Nature Reserve sector experienced a decline in visits of -13.4%, followed by the Historic Heritage Site category with a decline of -9.6% when comparing January-April 2008 with January-April 2007.

Attractions in Seaside and Rural locations experienced increases in visits of 2.0% and 0.8% respectively; whilst visits to attractions in Urban locations experienced decreases of -4.4%. Attractions welcoming between 20,000 and 49,999 visits experienced the greatest increase in visits of 10.7%, with those attracting between 1 and 19,999 visits experiencing increases of 3.1%. Only those attractions welcoming more 50,000 visits experienced a decrease of -3.2%.

Both Paid and Free admission attractions experienced decreases of -1.3% and -2.7% respectively. The greatest increases in visits by LEC area were experienced by attractions in Shetland (1,102.6%), Orkney (53.2%) and Dunbartonshire (42.8%). Glasgow experienced the greatest decrease of -16.7% followed by Borders and Moray experiencing decreases of -14.0% and 12.3% respectively when comparing January-April 2008 with January-April 2007.

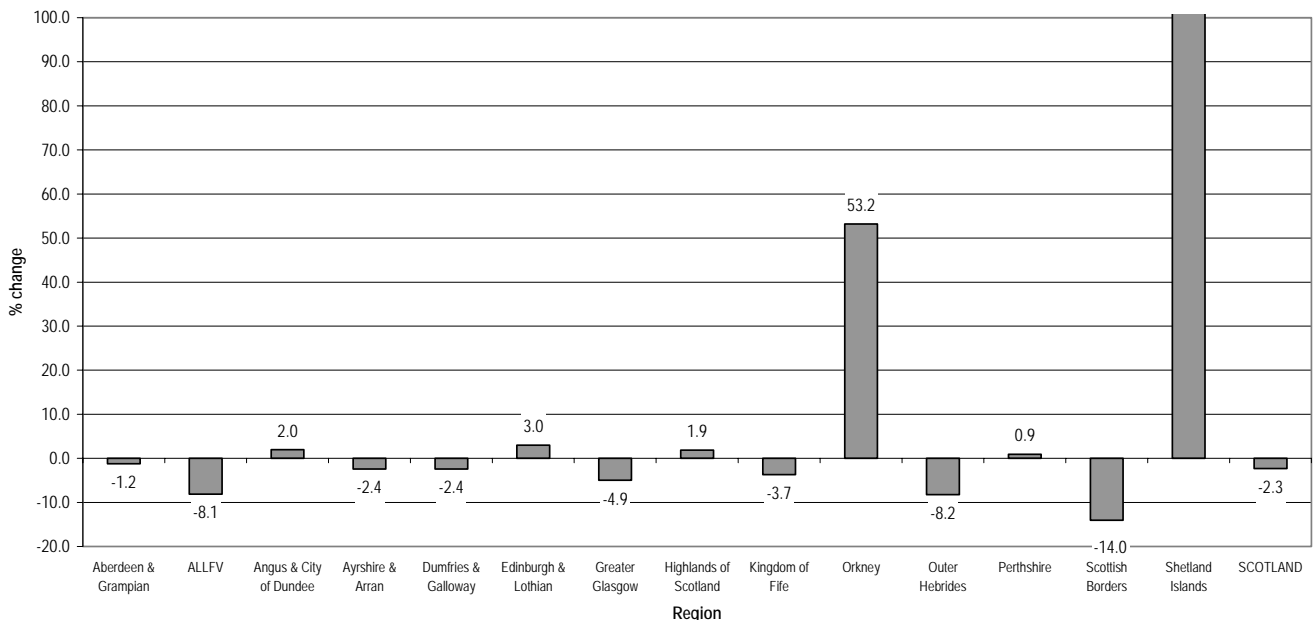
3.0 PERFORMANCE BY VISITSCOTLAND AREA

Performance by VisitScotland Area – April 2008/2007, March 2008/2007 and January-April 2008/2007

Area	Apr-08	Apr-07	%Change	Mar-08	Mar-07	%Change	Jan-Apr-08	Jan-Apr-07	%Change
Aberdeen & Grampian (58)	107,824	133,062	-19.0	89,767	83,770	7.2	341,815	345,926	-1.2
ALLFV (55)	159,704	202,892	-21.3	105,905	84,463	25.4	353,010	384,163	-8.1
Angus & City of Dundee (28)	118,438	146,970	-19.4	88,117	73,805	19.4	345,408	338,640	2.0
Ayrshire & Arran (11)	76,810	96,588	-20.5	40,735	35,834	13.7	190,854	195,533	-2.4
Dumfries & Galloway (40)	54,103	68,532	-21.1	35,377	20,790	70.2	114,078	116,868	-2.4
Edinburgh & Lothian (66)	652,602	745,847	-12.5	576,599	457,412	26.1	2,019,884	1,961,129	3.0
Greater Glasgow (71)	1,449,655	1,673,000	-13.3	1,330,629	1,182,812	12.5	4,780,770	5,028,537	-4.9
Highlands of Scotland (64)	142,975	175,556	-18.6	95,774	61,455	55.8	349,650	343,226	1.9
Kingdom of Fife (28)	44,646	56,682	-21.2	33,721	27,967	20.6	122,193	126,913	-3.7
Orkney (19)	24,039	18,517	29.8	9,113	4,209	116.5	39,932	26,062	53.2
Outer Hebrides (8)	20,056	20,631	-2.8	17,874	20,438	-12.5	64,906	70,705	-8.2
Perthshire (23)	58,570	69,857	-16.2	33,971	24,189	40.4	130,105	128,914	0.9
Scottish Borders (33)	57,479	80,014	-28.2	43,068	41,609	3.5	155,382	180,722	-14.0
Shetland Islands (19)	7,581	1,649	359.7	6,740	189	3,466.1	25,616	2,130	1,102.6
SCOTLAND (523)	2,974,482	3,489,797	-14.8	2,507,390	2,118,942	18.3	9,033,603	9,249,468	-2.3

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

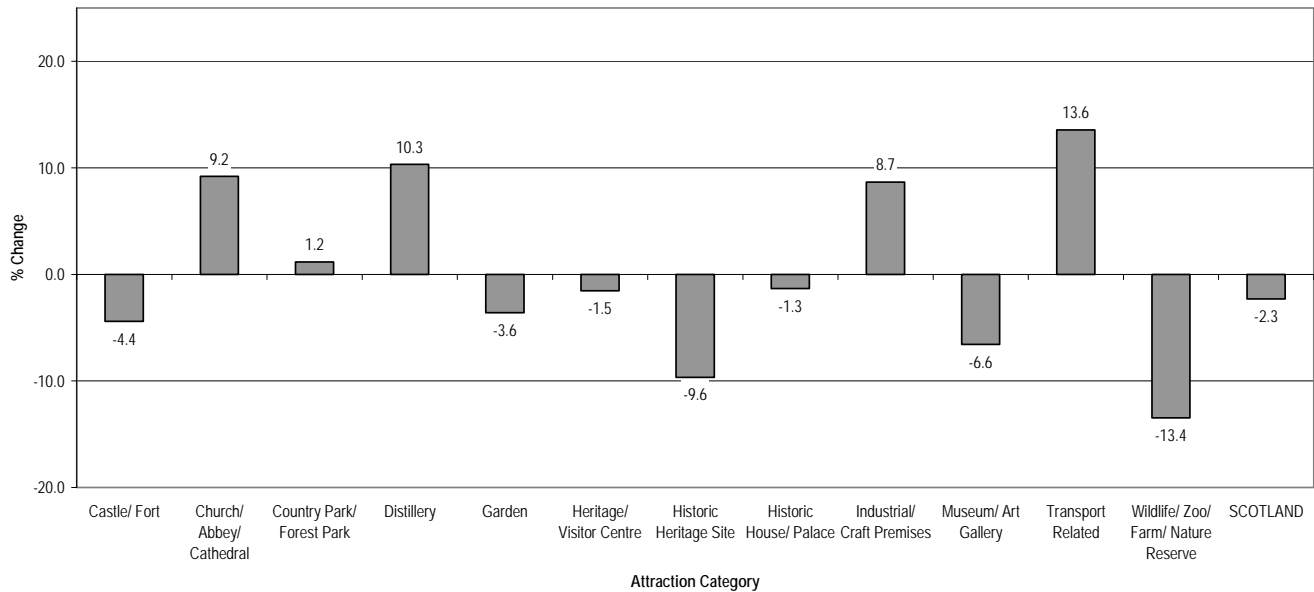
Performance by VisitScotland Area January-April 2008/2007


4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – April 2008/2007, March 2008/2007 and January-April 2008/2007

Category	Apr-08	Apr-07	% Change	Mar-08	Mar-07	% Change	Jan-Apr-08	Jan-Apr-07	% Change
Castle/ Fort (51)	240,052	309,336	-22.4	152,678	108,940	40.1	543,056	568,047	-4.4
Church/ Abbey/ Cathedral (20)	73,319	73,870	-0.7	64,234	53,311	20.5	216,880	198,583	9.2
Country Park / Forest Park (18)	1,057,209	1,190,975	-11.2	944,595	794,446	18.9	3,421,754	3,382,310	1.2
Distillery (25)	35,530	39,273	-9.5	25,102	17,466	43.7	84,897	76,936	10.3
Garden (27)	68,781	84,132	-18.2	53,791	46,996	14.5	197,737	205,100	-3.6
Heritage/ Visitor Centre (85)	320,123	385,362	-16.9	243,564	198,282	22.8	849,618	862,878	-1.5
Historic Heritage Site (39)	34,171	46,030	-25.8	14,485	9,516	52.2	58,932	65,226	-9.6
Historic House/ Palace (33)	63,283	75,081	-15.7	26,476	15,377	72.2	109,132	110,591	-1.3
Industrial/ Craft Premises (10)	2,612	3,834	-31.9	2,937	1,682	74.6	7,711	7,096	8.7
Museum/ Art Gallery (181)	881,704	993,663	-11.3	828,876	769,494	7.7	2,998,497	3,209,288	-6.6
Transport Related (10)	72,516	91,197	-20.5	63,567	43,575	45.9	242,691	213,693	13.6
Wildlife/ Zoo/ Farm/ Nature Reserve (24)	125,182	197,044	-36.5	87,085	59,857	45.5	302,698	349,720	-13.4
SCOTLAND (523)	2,974,482	3,489,797	-14.8	2,507,390	2,118,942	18.3	9,033,603	9,249,468	-2.3

Performance by Attraction Category January - April 2008/2007



5.0 PERFORMANCE BY LOCATION

Performance by Location – April 2008/2007, March 2008/2007 and January-April 2008/2007

Location	Apr-08	Apr-07	% Change	Mar-08	Mar-07	% Change	Jan-Apr-08	Jan-Apr-07	% Change
Rural (220)	1,068,746	1,226,726	-12.9	927,508	733,044	26.5	3,248,884	3,223,169	0.8
Seaside (73)	146,048	170,912	-14.5	101,246	79,673	27.1	370,386	363,059	2.0
Urban (230)	1,759,688	2,092,159	-15.9	1,478,636	1,306,225	13.2	5,414,333	5,663,240	-4.4
SCOTLAND (523)	2,974,482	3,489,797	-14.8	2,507,390	2,118,942	18.3	9,033,603	9,249,468	-2.3

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

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – April 2008/2007, March 2008/2007 and January-April 2008/2007

Location	Apr-08	Apr-07	% Change	Mar-08	Mar-07	% Change	Jan-Apr-08	Jan-Apr-07	% Change
1 - 19,999 (331)	178,053	215,633	-17.4	93,442	58,744.0	59.07	360,099.0	349,225	3.1
20,000 - 49,999 (79)	189,088	211,405	-10.6	125,473	92,636.0	35.45	480,784	434,292	10.7
50,000 + (113)	2,607,341	3,062,759	-14.9	2,288,475	1,967,562.0	16.31	8,192,720	8,465,951	-3.2
SCOTLAND (523)	2,974,482	3,489,797	-14.8	2,507,390	2,118,942	18.3	9,033,603	9,249,468	-2.3

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 – April 2008/2007, March 2008/2007 and January-April 2008/2007

Location	Apr-08	Apr-07	% Change	Mar-08	Mar-07	% Change	Jan-Apr-08	Jan-Apr-07	% Change
Free (231)	2,113,307	2,409,311	-12.3	1,918,180	1,685,793	13.8	6,879,090	7,066,971	-2.7
Paid (292)	861,175	1,080,486	-20.3	589,210	433,149	36.0	2,154,513	2,182,497	-1.3
SCOTLAND (523)	2,974,482	3,489,797	-14.8	2,507,390	2,118,942	18.3	9,033,603	9,249,468	-2.3

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 – April 2008/2007, March 2008/2007 and January-April 2008/2007

LEC	Apr-08	Apr-07	%Change	Mar-08	Mar-07	%Change	Jan-Apr-08	Jan-Apr-07	%Change
Argyll & The Islands (29)	47,089	50,291	-6.4	25,005	16,995	47.1	90,055	83,995	7.2
Ayrshire (10)	73,728	93,161	-20.9	40,274	35,834	12.4	187,311	192,106	-2.5
Borders (33)	57,479	80,014	-28.2	43,068	41,609	3.5	155,382	180,722	-14.0
Caithness & Sutherland (16)	6,189	6,690	-7.5	2,388	272	777.9	8,959	7,288	22.9
Dumfries & Galloway (39)	54,003	67,986	-20.6	35,250	20,790	69.6	113,851	116,322	-2.1
Dunbartonshire (7)	55,274	46,707	18.3	53,110	32,855	61.6	202,458	141,788	42.8
Edinburgh & Lothians (66)	652,602	745,847	-12.5	576,599	457,412	26.1	2,019,884	1,961,129	3.0
Fife (28)	44,646	56,682	-21.2	33,721	27,967	20.6	122,193	126,913	-3.7
Forth Valley (24)	152,995	203,106	-24.7	112,873	88,698	27.3	357,006	390,821	-8.7
Glasgow (32)	432,473	542,162	-20.2	397,644	408,605	-2.7	1,486,112	1,783,287	-16.7
Grampian (48)	99,595	120,458	-17.3	85,472	80,415	6.3	325,886	326,857	-0.3
Inverness & East Highland (25)	81,552	107,627	-24.2	61,359	44,948	36.5	220,786	225,068	-1.9
Lanarkshire (24)	860,711	963,224	-10.6	803,335	660,575	21.6	2,815,976	2,805,154	0.4
Lochaber (8)	16,635	19,391	-14.2	12,306	6,302	95.3	40,949	39,120	4.7
Moray (14)	11,825	16,493	-28.3	5,139	3,561	44.3	20,469	23,329	-12.3
Orkney (19)	24,039	18,517	29.8	9,113	4,209	116.5	39,932	26,062	53.2
Renfrewshire (12)	64,372	69,248	-7.0	44,412	58,543	-24.1	184,100	204,453	-10.0
Shetland (19)	7,581	1,649	359.7	6,740	189	3,466.1	25,616	2,130	1,102.6
Skye & Wester Ross (10)	30,028	37,220	-19.3	17,777	9,783	81.7	68,341	66,872	2.2
Tayside (52)	181,610	222,693	-18.4	123,931	98,942	25.3	483,431	475,347	1.7
Western Isles (8)	20,056	20,631	-2.8	17,874	20,438	-12.5	64,906	70,705	-8.2
SCOTLAND (523)	2,974,482	3,489,797	-14.8	2,507,390	2,118,942	18.3	9,033,603	9,249,468	-2.3

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 January-April 2008.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Early Easter boosted March visits	Bad weather
Improved signage	Easter too early
Increase in marketing budget	Fuel costs
	General downturn in economy

*The re-opening of Kelvingrove Museum and Art Gallery in July has had a significant influence in shaping performance for January-April 2008. The opening of Shetland Museum and Archives in June 2007 successfully influenced performance for Shetland during the first part of 2008.