

## 2006 SCOTTISH VISITOR ATTRACTION BAROMETER January – April 2006 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. It provides 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@gcal.ac.uk](mailto:mma4@gcal.ac.uk)).

This Barometer compares the period of January–April 2006 with January–April 2005. Some 526 attraction operators provided figures for the months of January-April 2006 with 500 attractions providing comparable visits figures. The Easter weekend fell in March in 2005 and in April 2006, this is reflected in the increase in visits in April in 2006.

VisitScotland Region Western Isles has been changed to Outer Hebrides.

### 2.0 January-April 2006/2005 Summary

The total number of visits representing the 500 barometer attractions in Scotland for the month of April 2006 was **3,042,223**. When compared to data from the previous year of **2,722,807** this shows a visits increase of **12.6%**. The total number of visits for the responding 500 barometer attractions in Scotland for the period January-April 2006 was **7,917,905**. When compared to data from the previous year of **7,859,375** visits, this shows a visits increase of **1.5%**.

The following table shows total visits recorded for April 2006/2005 and January-April 2006/2005 as well as the % change calculation.

Attractions	Apr-06	Apr-05	%Change	Jan-Apr06	Jan-Apr05	%Change
500	3,042,223	2,722,807	12.6	7,917,905	7,859,375	1.5

A further breakdown is shown below, where the visits during the individual months of January-April 2006 can be compared with January-April 2005 with their % change calculations.

Attractions	Months	Visits	Months	Visits	%Change
500	Jan-06	1,550,297	Jan-05	1,329,018	16.7
	Feb-06	1,653,956	Feb-05	1,605,029	3.1
	Mar-06	1,700,317	Mar-05	2,202,521	-22.7
	Apr-06	3,042,223	Apr-05	2,722,807	12.6

The highest increase in visits recorded by Region in January-April 2006 was experienced in Orkney (25.3%) and Ayrshire & Arran (16.0%). Perthshire saw the greatest decline in visits over the same period with decreases of -5.6%. Both Aberdeen & Grampian and Scottish Borders saw decreases of visits figures of -3.8%.

During this early season period the highest increase in visits was recorded by Church/ Abbey/ Cathedral category (22.2%) followed by Historic Heritage Site (19.3%) and Castle/ Fort (13.5%). Historic House/ Palace category experienced a decline in visits of 22.6%, followed by Distillery category and Garden category with decreases of -9.8% and -9.2% respectively comparing January-April 2006 and January–April 2005.

Attractions located in Seaside locations saw the greatest increases in visits of 7.6%, with those in Rural locations increasing by 1.4% whilst visits to attractions in Urban locations remaining the same comparing January-April 2006 and January-April 2005. Attractions in all three ranges of volume of visits recorded an increase in visits; attractions that welcomed between 20,000 and 49,000 visits experienced the largest increase of 2.2%; followed by attractions welcoming between 1 and 19,999 visits (1.7%) and attractions welcoming over 50,000 visits (0.6%).

Paid admission attractions recorded an increase of 4.6%, whilst Free admission attractions experienced a decrease of -0.4% when comparing January-April 2006 and January-April 2005.

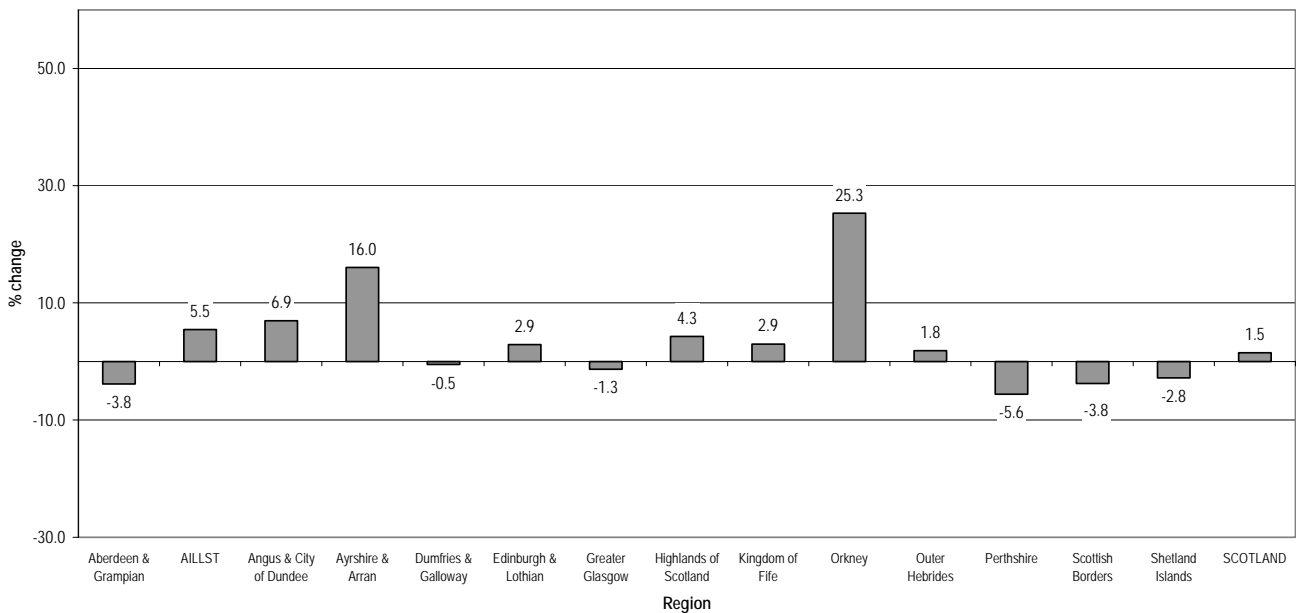
The highest increases in visits by LEC area were experienced by attractions in Orkney (25.3%), Ayrshire (16.6%) and Forth Valley (16.1%), whereas Argyll & The Islands and Ross & Cromarty experienced decreases in visits of -12.6% and -6.8% respectively.

**3.0 PERFORMANCE BY REGION**
**Performance by Region – April 2006/2005 and January-April 2006/2005**

Region	Apr-06	Apr-05	% Change	Jan-Apr06	Jan-Apr05	%Change
Aberdeen & Grampian (58)	182,361	167,726	8.7	427,695	444,716	-3.8
ALLST (61)	276,003	193,448	42.9	511,487	485,045	5.5
Angus & City of Dundee (27)	131,369	97,038	35.4	318,275	297,619	6.9
Ayrshire & Arran (13)	75,953	51,685	51.2	160,970	138,741	16.0
Dumfries & Galloway (37)	76,191	62,740	21.4	121,883	122,509	-0.5
Edinburgh & Lothian (58)	630,603	532,132	21.7	1,694,420	1,646,839	2.9
Greater Glasgow (58)	1,285,508	1,304,805	-1.5	3,943,101	3,995,848	-1.3
Highlands of Scotland (69)	170,984	137,589	24.3	338,962	325,078	4.3
Kingdom of Fife (26)	63,705	51,834	22.9	139,792	135,798	2.9
Orkney (15)	19,390	13,251	46.3	26,418	21,082	25.3
Outer Hebrides (8)	5,268	4,776	10.3	10,315	10,128	1.8
Perthshire (24)	72,874	62,105	24.2	129,713	137,391	-5.6
Scottish Borders (30)	50,396	42,077	19.8	93,070	96,725	-3.8
Shetland Islands (16)	1,618	1,601	1.1	1,804	1,856	-2.8
<b>SCOTLAND (500)</b>	<b>3,042,223</b>	<b>2,722,807</b>	<b>12.6</b>	<b>7,917,905</b>	<b>7,859,375</b>	<b>1.5</b>

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

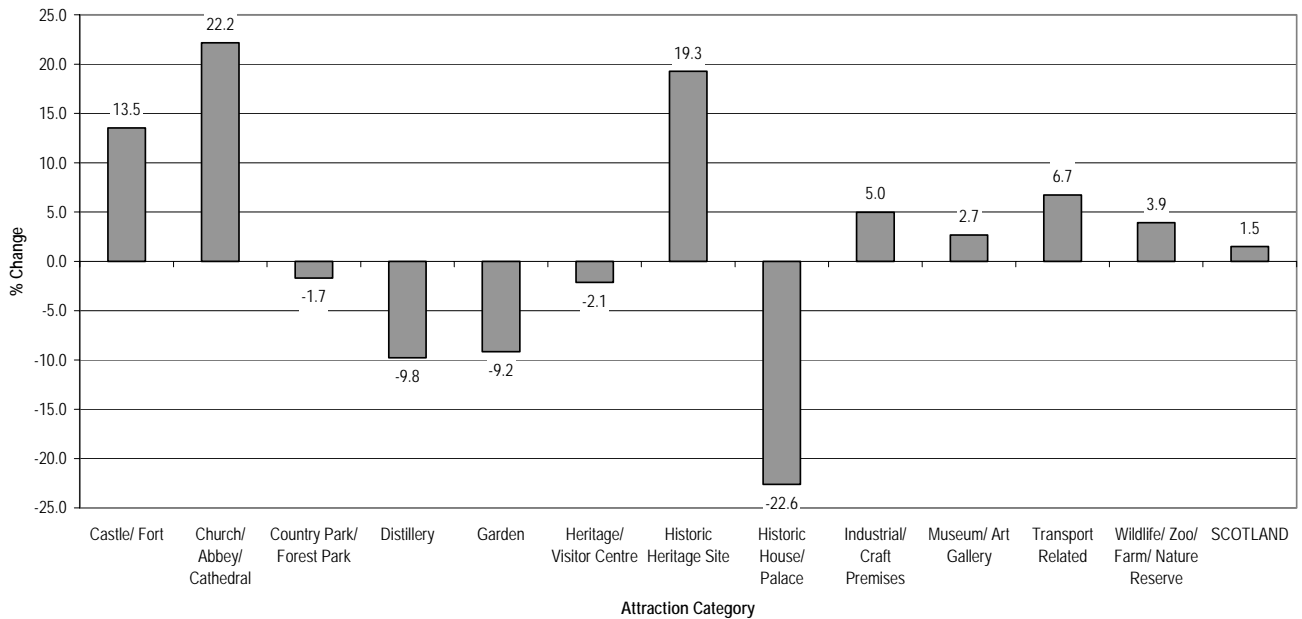
Performance by Region Jan-Apr 2006/2005


**4.0 PERFORMANCE BY ATTRACTION CATEGORY**
**Performance by Attraction Category – April 2006/2005 and January-April 2006/2005**

Category	Apr-06	Apr-05	% Change	Jan-Apr06	Jan-Apr05	%Change
Castle/ Fort (62)	354,132	246,724	43.5	629,808	554,710	13.5
Church/ Abbey/ Cathedral (12)	50,866	30,751	65.4	102,864	84,205	22.2
Country Park / Forest Park (13)	933,323	1,007,739	-7.4	2,949,161	2,999,493	-1.7
Distillery (24)	34,082	34,511	0.2	59,576	66,036	-9.8
Garden (28)	79,751	77,409	3.0	173,771	191,280	-9.2
Heritage/ Visitor Centre (85)	436,190	338,638	29.5	889,997	909,357	-2.1
Historic Heritage Site (37)	64,858	38,783	67.2	100,083	83,914	19.3
Historic House/ Palace (42)	73,993	75,703	14.9	140,722	181,863	-22.6
Industrial/ Craft Premises (10)	15,415	13,312	15.8	43,082	41,039	5.0
Museum/ Art Gallery (161)	855,635	752,986	14.2	2,545,151	2,479,144	2.7
Transport Related (9)	81,222	57,985	40.1	183,794	172,212	6.7
Wildlife / Zoo / Farm / Nature Reserve (17)	62,756	48,266	38.8	99,896	96,122	3.9
<b>SCOTLAND (500)</b>	<b>3,042,223</b>	<b>2,722,807</b>	<b>12.6</b>	<b>7,917,905</b>	<b>7,859,375</b>	<b>1.5</b>

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

Performance by Attraction Category Jan-Apr 2006/2005



## 5.0 PERFORMANCE BY LOCATION

### Performance by Location – April 2006/2005 and January-April 2006/2005

Location	Apr-06	Apr-05	% Change	Jan-Apr06	Jan-Apr05	%Change
Rural (221)	1,237,711	1,204,107	3.1	3,199,447	3,156,017	1.4
Seaside (61)	120,350	89,048	35.7	209,582	194,808	7.6
Urban (218)	1,684,162	1,429,652	19.1	4,508,876	4,508,550	0.0
<b>Scotland (500)</b>	<b>3,042,223</b>	<b>2,722,807</b>	<b>12.6</b>	<b>7,917,905</b>	<b>7,859,375</b>	<b>1.5</b>

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 2006/2005 and January-April 2006/2005

Range of Volume of Visits	Apr-06	Apr-05	% Change	Jan-Apr06	Jan-Apr05	%Change
1 - 19,999 (305)	200,126	162,541	23.5	311,563	306,325	1.7
20,000 - 49,999 (77)	236,438	198,999	24.0	444,551	435,052	2.2
50,000 + (118)	2,605,659	2,361,267	10.9	7,161,791	7,117,998	0.6
<b>SCOTLAND (500)</b>	<b>3,042,223</b>	<b>2,722,807</b>	<b>12.6</b>	<b>7,917,905</b>	<b>7,859,375</b>	<b>1.5</b>

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 2006/2005 and January-April 2006/2005

Admission	Apr-06	Apr-05	% Change	Jan-Apr06	Jan-Apr05	%Change
Free (216)	2,077,111	1,989,867	4.4	6,055,895	6,079,523	-0.4
Paid (284)	965,112	732,940	34.9	1,862,010	1,779,852	4.6
<b>SCOTLAND (500)</b>	<b>3,042,223</b>	<b>2,722,807</b>	<b>12.6</b>	<b>7,917,905</b>	<b>7,859,375</b>	<b>1.5</b>

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

8.0 **PERFORMANCE BY LOCAL ENTERPRISE COMPANY (LEC) AREA**

## Performance by LEC Area – April 2006/2005 and January-April 2006/2005

LEC	Apr-06	Apr-05	% Change	Jan-Apr06	Jan-Apr05	%Change
Argyll & The Islands (28)	52,566	47,832	10.9	77,248	88,422	-12.6
Ayrshire (12)	73,443	49,367	53.3	158,460	135,958	16.6
Borders (30)	50,396	42,077	19.8	93,070	96,725	-3.8
Caithness & Sutherland (15)	8,057	5,784	39.3	8,842	8,333	6.1
Dumfries & Galloway (37)	76,191	62,740	21.4	121,883	122,509	-0.5
Dunbartonshire (8)	81,480	65,399	24.6	232,737	225,791	3.1
Edinburgh & Lothian (57)	625,870	530,798	21.1	1,686,360	1,643,361	2.6
Fife (26)	63,705	51,834	22.9	139,792	135,798	2.9
Forth Valley (29)	239,101	150,114	59.3	455,457	392,341	16.1
Glasgow (30)	355,801	290,193	22.6	1,034,284	976,416	5.9
Grampian (43)	131,800	122,936	7.2	310,928	327,854	-5.2
Inverness, Nairn, Badenoch & Strathspey (19)	92,717	70,317	31.9	191,122	179,419	6.5
Lanarkshire (15)	783,808	900,242	-12.9	2,497,509	2,636,706	-5.3
Lochaber (11)	22,510	16,504	36.4	48,061	46,028	4.4
Moray (18)	51,839	46,889	10.6	118,170	119,355	-1.0
Orkney (15)	19,390	13,251	46.3	26,418	21,082	25.3
Renfrewshire (11)	56,121	50,324	11.5	166,058	169,165	-1.8
Ross & Cromarty (13)	7,723	8,712	-11.4	11,413	12,247	-6.8
Shetland (16)	1,618	1,601	1.1	1,804	1,856	-2.8
Skye & Lochalsh (7)	34,215	29,809	14.8	73,637	70,678	4.2
Tayside (52)	208,604	161,308	32.0	454,337	439,203	3.4
Western Isles (8)	5,268	4,776	10.3	10,315	10,128	1.8
<b>SCOTLAND (500)</b>	<b>3,042,223</b>	<b>2,722,807</b>	<b>12.6</b>	<b>7,917,905</b>	<b>7,859,375</b>	<b>1.5</b>

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

9.0 **COMMENTS**

The following quotes have been drawn from comments made by operators to explain the reasons that have impacted on visitation performance during the period January-April 2006.

**Reasons for positive impacts on visitor figures:-**

New displays popular with school groups  
 Later Easter increased visits  
 Cruise ship visit boosted numbers  
 Popular temporary exhibition in March

**Reasons for negative impacts in visitor figures:-**

Poor weather  
 High fuel prices  
 Closed for refurbishment for 1 month