

**2006 SCOTTISH VISITOR ATTRACTION BAROMETER
July 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).

This Barometer compares the period of July 2006 with July 2005. Some 527 attraction operators provided figures for the month of July 2006 with 507 attractions providing comparable visits figures. Figures for the July Visitor Attraction Barometer include visitor figures for the recently re-opened Kelvingrove Art Gallery and Museum.

From April 1st 2006 Ross and Cromarty Enterprise and Inverness, Nairn, Badenoch & Strathspey Enterprise have merged and are now collectively known as HIE Inverness and East Highland. The boundaries encompass the areas of Inverness, Nairn, Badenoch & Strathspey, Easter Ross and the Black Isle. Skye & Lochalsh Enterprise now cover Wester Ross and are now known as HIE Skye & Wester Ross.

**2.0 JULY 2006/2005
Summary**

The total number of visits representing the 507 barometer attractions in Scotland for the month of July 2006 was **4,874,193**. When compared to data from the previous year of **4,333,669** this shows a visits increase of **12.5%**. The total number of visits for the responding 507 barometer attractions in Scotland for the period January-July 2006 was **19,163,043**. When compared to data from the previous year of **18,656,217** visits, this shows a visits increase of **2.7%**.

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

Attractions	Jul-06	Jul-05	% Change	Jan-Jul06	Jan-Jul06	%Change
507	4,874,193	4,333,669	12.5	19,163,043	18,656,217	2.7

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

Attractions	Months	Visits	Months	Visits	%Change
507	Jan-06	1,558,953	Jan-05	1,327,362	17.4
	Feb-06	1,664,736	Feb-05	1,600,249	4.0
	Mar-06	1,700,001	Mar-05	2,200,150	-22.7
	Apr-06	3,127,286	Apr-05	2,750,426	13.7
	May-06	2,887,020	May-05	3,072,355	-6.0
	Jun-06	3,350,854	Jun-05	3,372,006	-0.6
	Jul-06	4,874,193	Jul-05	4,333,669	12.5

The highest increase in visits recorded by VisitScotland Region in July 2006 was experienced in Greater Glasgow (30.0%) and Shetland Islands (23.4%). The Scottish Borders experienced the greatest decline in visits over the same period with decreases of -22.8%. Perthshire and Orkney also experienced decreases in visits figures of -17.8% and -15.7% respectively.

During this period the highest increase in visits was recorded by Museum/ Art Gallery category (44.7%) followed by Church/ Abbey/ Cathedral sites (34.9%). The Industrial/ Craft Premises category experienced a decline in visits of -20.6%, followed by the Distillery category with a decline of -10.7% and Transport Related Category experiencing a decline of -9.1%, comparing July 2006 and July 2005.

Attractions in Urban locations experienced an increase in visits of 25.2%, whilst visits to attractions in Rural locations experienced a smaller increase of 0.7%. Those attractions in seaside locations saw decreases in visits of -3.0%. Attractions welcoming over 50,000 visits experienced the greatest increase in visits of 15.5%, with those attracting between 1 and 19,999 and 20,000 and 49,999 visits experienced increased of 0.4% and 0.1% respectively when comparing July 2006 with July 2005.

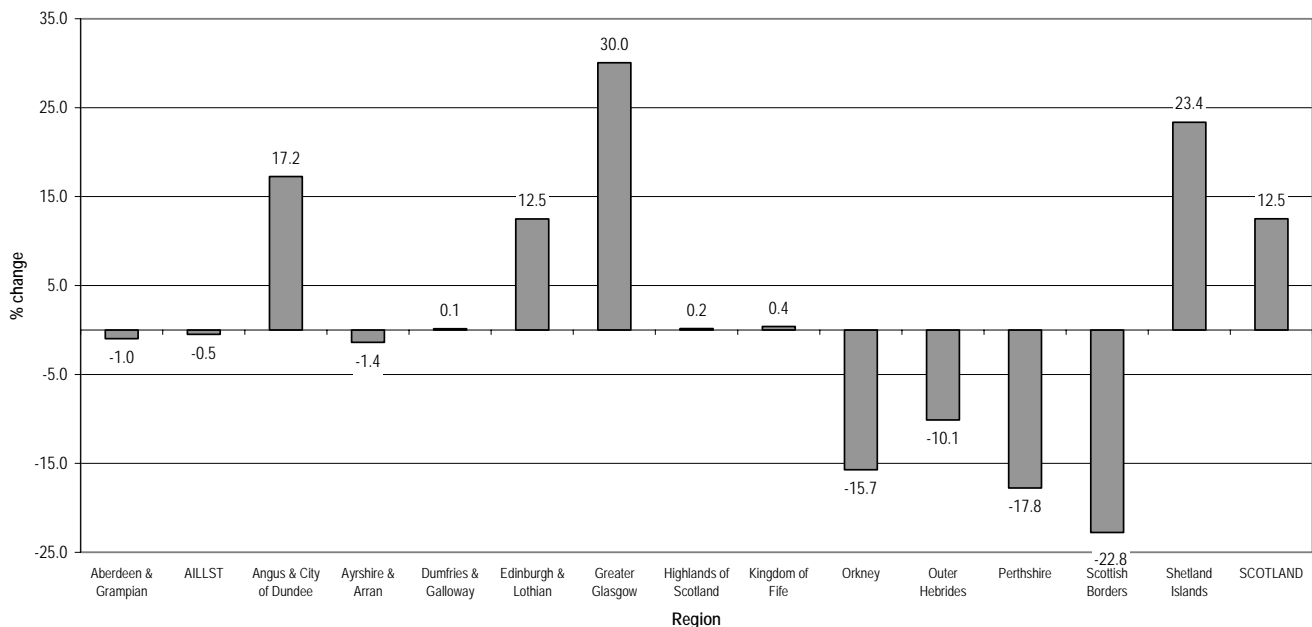
Free and Paid admission attractions experienced an increase in visits of 20.1% and 0.4% respectively. The highest increases in visits by LEC area were experienced by attractions in Glasgow (106.4%), Caithness & Sutherland (28.9%) and Shetland (23.4%), whereas Borders; Orkney and Lochaber experienced decreases in visits of -22.8%; -15.7% and -15.4 % respectively.

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

Region	Jul-06	Jul-05	% Change	Jan-Jul06	Jan-Jul05	%Change
Aberdeen & Grampian (63)	295,818	298,763	-1.0	1,130,982	1,166,199	-3.0
AILLST (55)	356,541	358,228	-0.5	1,377,031	1,349,804	2.0
Angus & City of Dundee (28)	247,885	211,416	17.2	994,416	869,172	14.4
Ayrshire & Arran (15)	129,894	131,716	-1.4	474,207	453,395	4.6
Dumfries & Galloway (37)	116,448	116,282	0.1	398,397	394,871	0.9
Edinburgh & Lothian (58)	864,933	768,971	12.5	3,878,925	3,690,836	5.1
Greater Glasgow (62)	2,058,777	1,583,168	30.0	8,224,789	7,951,082	3.4
Highlands of Scotland (67)	386,679	386,046	0.2	1,217,922	1,176,270	3.5
Kingdom of Fife (28)	110,594	110,140	0.4	401,916	399,136	0.7
Orkney (18)	78,255	92,838	-15.7	201,815	216,087	-6.6
Outer Hebrides (5)	10,816	12,032	-10.1	34,495	34,897	-1.2
Perthshire (21)	98,876	120,231	-17.8	371,738	390,406	-4.8
Scottish Borders (35)	98,372	127,378	-22.8	412,653	523,663	-21.2
Shetland Islands (15)	20,305	16,460	23.4	43,757	40,399	8.3
SCOTLAND (507)	4,874,193	4,333,669	12.5	19,163,043	18,656,217	2.7

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

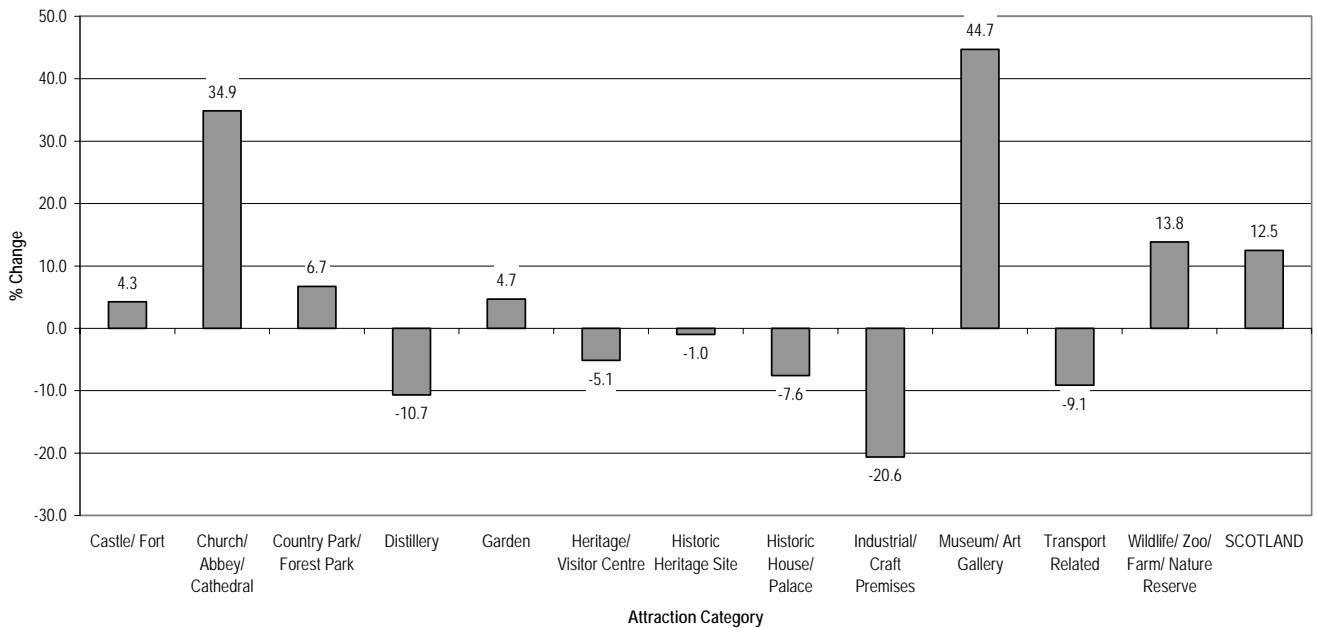
Performance by Region July 2006/2005


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

Category	Jul-06	Jul-05	% Change	Jan-Jul06	Jan-Jul05	%Change
Castle/ Fort (63)	647,503	621,079	4.3	2,111,726	2,010,202	5.1
Church/ Abbey/ Cathedral (11)	97,993	72,667	34.9	337,076	272,623	23.6
Country Park / Forest Park (16)	1,378,347	1,291,680	6.7	6,361,320	6,492,614	-2.0
Distillery (21)	63,952	71,594	-10.7	197,652	208,030	-5.0
Garden (28)	142,137	135,782	4.7	544,748	575,693	-5.4
Heritage/ Visitor Centre (80)	490,009	516,520	-5.1	2,027,474	2,038,860	-0.6
Historic Heritage Site (39)	138,256	139,661	-1.0	420,225	394,778	6.4
Historic House/ Palace (41)	150,311	162,636	-7.6	504,972	519,667	-2.8
Industrial/ Craft Premises (12)	25,297	31,872	-20.6	107,653	118,695	-9.3
Museum/ Art Gallery (168)	1,402,358	969,066	44.7	5,314,755	4,846,626	9.7
Transport Related (7)	109,008	119,941	-9.1	448,068	461,891	-3.0
Wildlife / Zoo / Farm / Nature Reserve (21)	229,022	201,171	13.8	787,374	716,538	9.9
SCOTLAND (507)	4,874,193	4,333,669	12.5	19,163,043	18,656,217	2.7

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

Performance by Attraction Category July 2006/2005



5.0 PERFORMANCE BY LOCATION

Performance by Location – July 2006/2005 and January-July 2006/2005

Location	Jul-06	Jul-05	% Change	Jan-Jul06	Jan-Jul05	%Change
Rural (227)	2,030,382	2,016,091	0.7	8,110,768	8,131,269	-0.3
Seaside (60)	200,745	206,851	-3.0	623,567	606,749	2.8
Urban (220)	2,643,066	2,110,727	25.2	10,428,708	9,918,199	5.2
SCOTLAND (507)	4,874,193	4,333,669	12.5	19,163,043	18,656,217	2.7

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

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – July 2006/2005 and January-July 2006/2005

Range of Volume of Visits	Jul-06	Jul-05	% Change	Jan-Jul06	Jan-Jul05	%Change
1 - 19,999 (317)	445,350	443,630	0.4	1,386,703	1,360,342	-6.9
20,000 - 49,999 (76)	415,173	414,697	0.1	1,402,316	1,377,603	-7.1
50,000 + (114)	4,013,670	3,475,342	15.5	16,374,024	15,918,272	-5.2
SCOTLAND (507)	4,874,193	4,333,669	12.5	19,163,043	18,656,217	2.7

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 – July 2006/2005 and January-July 2006/2005

Admission	Jul-06	Jul-05	% Change	Jan-Jul06	Jan-Jul05	%Change
Free (223)	3,188,585	2,654,593	20.1	13,188,389	12,811,945	2.9
Paid (284)	1,685,608	1,679,076	0.4	5,974,654	5,844,272	2.2
SCOTLAND (507)	4,874,193	4,333,669	12.5	19,163,043	18,656,217	2.7

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 – July 2006/2005 and January-July 2006/2005

LEC	Jul-06	Jul-05	% Change	Jan-Jul06	Jan-Jul05	%Change
Argyll & The Islands (26)	104,660	115,577	-9.4	330,486	355,936	-7.2
Ayrshire (14)	121,876	123,099	-1.0	455,683	433,009	5.2
Borders (35)	98,372	127,378	-22.8	412,653	523,663	-21.2
Caithness & Sutherland (16)	51,684	40,103	28.9	115,331	100,490	14.8
Dumfries & Galloway (37)	116,448	116,282	0.1	398,397	394,871	0.9
Dunbartonshire (7)	98,529	95,782	2.9	482,483	493,987	-2.3
Edinburgh & Lothian (57)	861,219	765,754	12.5	3,862,321	3,681,435	4.9
Fife (28)	110,594	110,140	0.4	401,916	399,136	0.7
Forth Valley (26)	224,486	220,096	2.0	926,373	876,182	5.7
Glasgow (30)	813,127	394,002	106.4	2,414,011	1,941,259	24.4
Grampian (48)	222,685	215,823	3.2	822,795	841,742	-2.3
Inverness & East Highland (25)	183,240	184,472	-0.7	648,675	622,742	4.2
Lanarkshire (19)	1,114,575	1,062,198	4.9	5,126,236	5,303,238	-3.3
Lochaber (10)	42,500	50,256	-15.4	160,129	158,781	0.8
Moray (18)	78,202	89,538	-12.7	325,164	342,939	-5.2
Orkney (18)	78,255	92,838	-15.7	201,815	216,087	-6.6
Renfrewshire (11)	70,625	68,239	3.5	352,256	367,391	-4.1
Shetland (15)	20,305	16,460	23.4	43,757	40,399	8.3
Skye & Wester Ross (12)	96,323	94,431	2.0	254,537	246,274	3.4
Tayside (50)	355,672	339,169	4.9	1,393,530	1,281,759	8.7
Western Isles (5)	10,816	12,032	-10.1	34,495	34,897	-1.2
SCOTLAND (507)	4,874,193	4,333,669	12.5	19,163,043	18,656,217	2.7

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

9.0 **COMMENTS**

The reopening of the Kelvingrove Museum and Art Gallery has had a significant influence in shaping performance for July 2006.

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

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Special event increased numbers	World Cup
Hot weather increased visits to outdoor attractions	Fewer coach tours
Popular exhibition	High fuel prices
Start of English school holidays	Airline security issues
Longer opening hours	Strong pound