



**2006 SCOTTISH VISITOR ATTRACTION BAROMETER
October 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, 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 October 2006 with October 2005. Some 497 attraction operators provided figures for the month of October 2006 with 479 attractions providing comparable visits figures.

**2.0 OCTOBER 2006/2005
Summary**

The total number of visits representing the 479 barometer attractions in Scotland for the month of October 2006 was **2,572,506**. When compared to data from the previous year of **2,449,191** this shows a visits increase of **5.0%**. The total number of visits for the responding 479 barometer attractions in Scotland for the period January-October 2006 was **28,992,229**. When compared to data from the previous year of **27,719,568** visits, this shows a visits increase of **4.6%**.

*The re-opening of Kelvingrove Museum and Art Gallery in July has had a significant influence in shaping performance for October 2006. Figures have been adjusted in each table and an extra section added to show findings that exclude Kelvingrove Museum and Art Gallery visits. The following table shows total visits recorded for October 2006/2005 and January-October 2006/2005 as well as the % change calculation.

Attractions	Oct-06	Oct-05	% Change	Jan-Oct06	Jan-Oct05	%Change
479	2,572,506	2,449,191	5.0	28,992,229	27,719,568	4.6
* 478 (ex Kelvingrove)	2,242,117	2,449,191	-8.5	27,500,209	27,719,568	-0.8

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

Attractions	Months	Visits	Months	Visits	%Change
479	Jan-06	1,503,732	Jan-05	1,266,252	18.8
	Feb-06	1,605,133	Feb-05	1,544,764	3.9
	Mar-06	1,644,664	Mar-05	2,116,330	-22.3
	Apr-06	3,010,643	Apr-05	2,622,247	14.8
	May-06	2,770,338	May-05	2,944,262	-5.9
	Jun-06	3,221,837	Jun-05	3,232,594	-0.3
	Jul-06	4,710,094	Jul-05	4,166,163	13.1
	Aug-06	4,794,495	Aug-05	4,519,380	6.1
	Sep-06	3,158,787	Sep-05	2,858,385	10.5
	Oct-06	2,572,506	Oct-05	2,449,191	5.0
* 478 (ex-Kelvingrove)	Oct-06	2,242,117	Oct-05	2,449,191	-8.5

The highest increase in visits recorded by VisitScotland Region in October 2006 was experienced in Greater Glasgow (14.6%) and Angus & City of Dundee (12.3%). Shetland Islands experienced the greatest decline in visits over the same period with decreases of -36.9%. AILLST; Kingdom of Fife and Edinburgh also experienced decreases in visits figures of -8.1%; -6.5% and -5.5% respectively.

During this period the highest increase in visits was recorded by Museum/ Art Gallery category (38.5%) followed by Historic House/ Palace sites (6.9%). The Country Park/ Forest Park category experienced a decline in visits of -20.2%, followed by the Church/ Abbey/ Cathedral category with a decline of -19.2% and Distillery sites experiencing a decline of -16.7%, comparing October 2006 with October 2005.

Attractions in Urban and Seaside locations experienced increases in visits of 19.7% and 3.0% respectively; whilst visits to attractions in Rural locations experienced decreases of -17.6%. Attractions welcoming between 1 and 19,999 visits experienced the greatest increase in visits of 8.6%, with those attracting over 50,000 visits and between 20,000 and 49,999 visits experiencing increases of 5.0% and 3.0% respectively.

Free admission attractions experienced an increase in visits of 7.9%, whilst Paid admission attractions experienced a decrease in visits of -1.5%. The highest increases in visits by LEC area were experienced by attractions in Glasgow (107.3%), Caithness & Sutherland (71.8%) and Renfrewshire (60.9%), whereas Shetland and Lanarkshire experienced decreases in visits of -36.9% and -28.5% respectively when comparing October 2006 with October 2005. Worth noting also is the decline experienced in Edinburgh & Lothians of -5.6%.

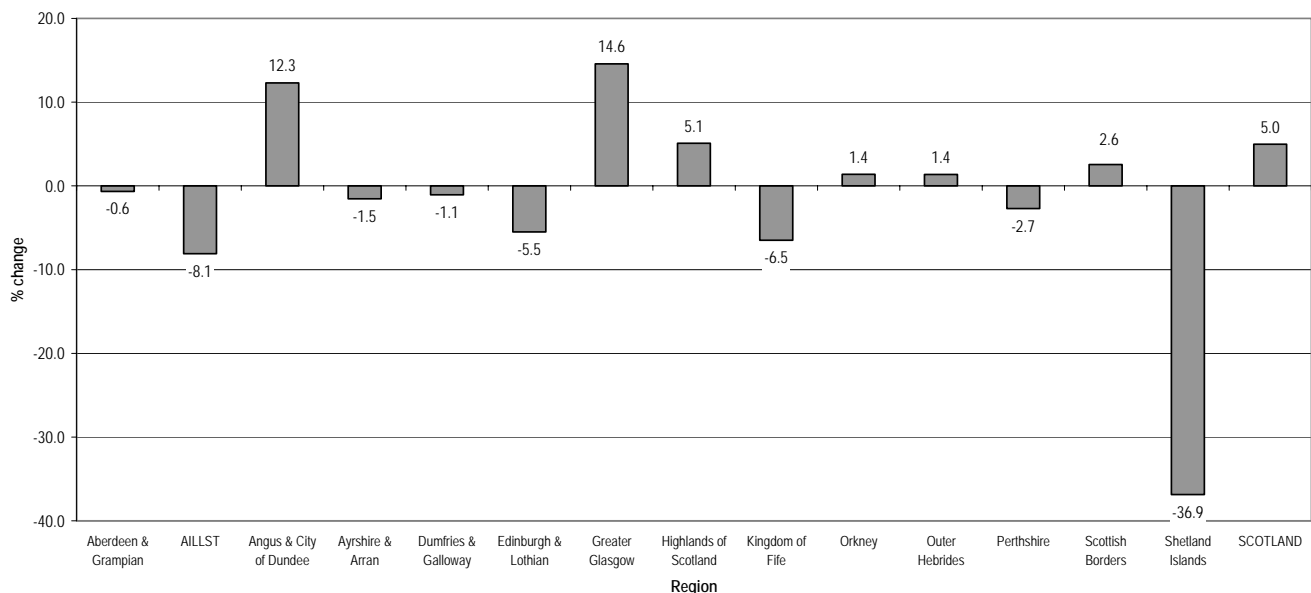
3.0 PERFORMANCE BY VISITSCOTLAND REGION

Performance by VisitScotland Region – October 2006/2005 and January-October 2006/2005

Region	Oct-06	Oct-05	% Change	Jan-Oct06	Jan-Oct05	%Change
Aberdeen & Grampian (60)	128,581	129,422	-0.6	1,619,284	1,658,273	-2.4
ALLST (49)	158,561	172,553	-8.1	2,171,642	2,165,577	0.3
Angus & City of Dundee (28)	120,311	107,139	12.3	1,546,831	1,380,491	12.0
Ayrshire & Arran (13)	31,256	31,745	-1.5	436,751	447,481	-2.4
Dumfries & Galloway (35)	44,406	44,888	-1.1	580,633	589,096	-1.4
Edinburgh & Lothian (60)	571,563	604,812	-5.5	6,277,518	6,028,351	4.1
Greater Glasgow (61)	1,231,985	1,075,181	14.6	12,524,225	11,547,422	8.5
Highlands of Scotland (60)	133,061	126,604	5.1	1,653,429	1,663,810	-0.6
Kingdom of Fife (27)	46,456	49,670	-6.5	635,491	639,232	-0.6
Orkney (18)	10,310	10,168	1.4	340,697	353,580	-3.6
Outer Hebrides (5)	3,127	3,085	1.4	54,964	55,904	-1.7
Perthshire (19)	59,158	60,808	-2.7	655,423	672,464	-2.5
Scottish Borders (28)	33,354	32,519	2.6	429,659	454,108	-5.4
Shetland Islands (16)	377	597	-36.9	65,682	63,779	3.0
SCOTLAND (479)	2,572,506	2,449,191	5.0	28,992,229	27,719,568	4.6
*Greater Glasgow (60) (ex K'grove)	901,596	1,075,181	-16.1	11,032,205	11,547,422	-4.5

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

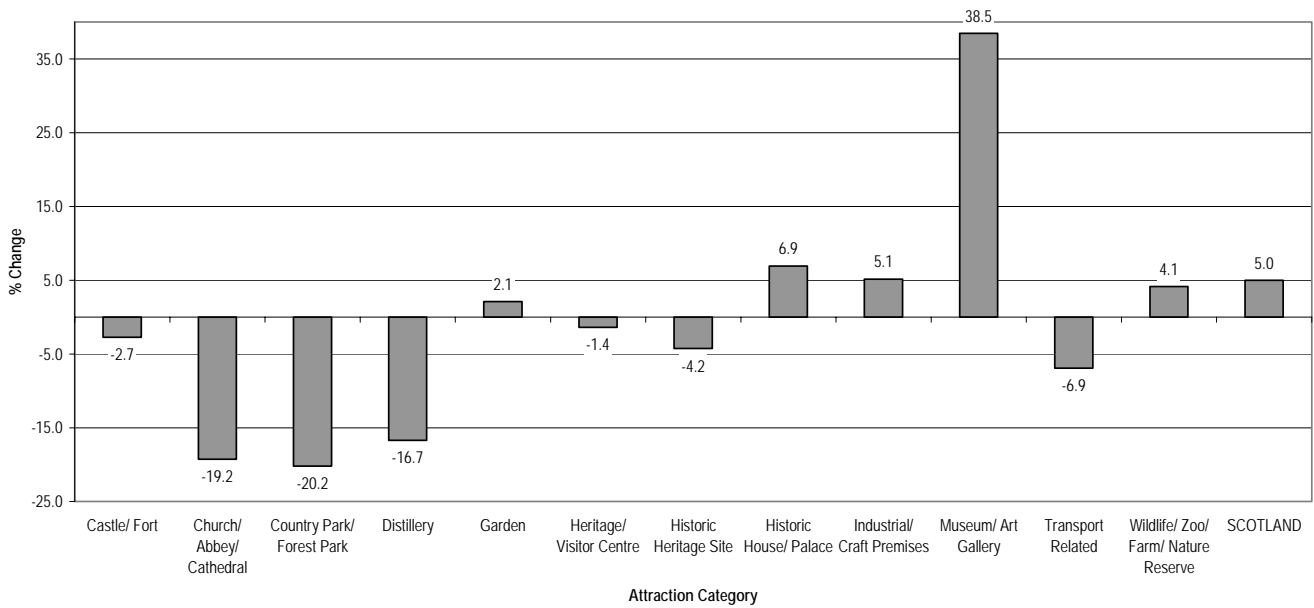
Performance by VisitScotland Region October 2006/2005


4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – October 2006/2005 and January-October 2006/2005

Category	Oct-06	Oct-05	% Change	Jan-Oct06	Jan-Oct05	%Change
Castle/ Fort (59)	217,741	223,861	-2.7	3,119,028	3,085,420	1.1
Church/ Abbey/ Cathedral (14)	33,944	42,035	-19.2	541,258	462,302	17.1
Country Park / Forest Park (11)	618,549	775,175	-20.2	8,417,790	8,794,419	-4.3
Distillery (20)	25,134	30,167	-16.7	358,791	379,864	-5.5
Garden (25)	59,179	57,960	2.1	771,291	806,258	-4.3
Heritage/ Visitor Centre (73)	260,184	263,817	-1.4	2,910,493	2,908,565	0.1
Historic Heritage Site (37)	36,159	37,762	-4.2	689,559	663,538	3.9
Historic House/ Palace (41)	69,660	65,150	6.9	851,232	876,874	-2.9
Industrial/ Craft Premises (11)	16,059	15,273	5.1	173,042	185,366	-6.6
Museum/ Art Gallery (158)	1,074,883	776,261	38.5	9,240,609	7,665,221	20.6
Transport Related (8)	62,365	66,995	-6.9	705,876	747,452	-5.6
Wildlife / Zoo / Farm / Nature Reserve (22)	98,649	94,735	4.1	1,213,260	1,144,289	6.0
SCOTLAND (479)	2,572,506	2,449,191	5.0	28,992,229	27,719,568	4.6
* Museum/ Art Gallery (157) (ex Kelvingrove)	744,494	776,261	-4.1	7,748,589	7,665,221	1.1

Performance by Attraction Category October 2006/2005



5.0 PERFORMANCE BY LOCATION

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

Location	Oct-06	Oct-05	% Change	Jan-Oct06	Jan-Oct05	%Change
Rural (203)	774,334	939,385	-17.6	10,912,960	11,205,836	-2.6
Seaside (61)	57,840	56,177	3.0	1,017,496	1,007,873	1.0
Urban (215)	1,740,332	1,453,629	19.7	17,061,773	15,505,859	10.0
SCOTLAND (479)	2,572,506	2,449,191	5.0	28,992,229	27,719,568	4.6
Urban (214) (ex Kelvingrove)	1,409,943	1,453,629	-3.0	15,569,753	15,505,859	0.4

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

6.0 PERFORMANCE BY VOLUME OF VISITS

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

Range of Volume of Visits	Oct-06	Oct-05	% Change	Jan-Oct06	Jan-Oct05	%Change
1 - 19,999 (294)	134,293	123,678	8.6	2,105,334	2,075,915	1.4
20,000 - 49,999 (72)	182,028	176,760	3.0	2,178,186	2,147,998	1.4
50,000 + (113)	2,256,185	2,148,753	5.0	24,708,709	23,495,655	5.2
SCOTLAND (479)	2,572,506	2,449,191	5.0	28,992,229	27,719,568	4.6
* 50,000 + (112) (ex Kelvingrove)	1,925,796	2,148,753	-10.4	23,216,689	23,495,655	-1.2

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 – October 2006/2005 and January-October 2006/2005

Admission	Oct-06	Oct-05	% Change	Jan-Oct06	Jan-Oct05	%Change
Free (209)	1,835,741	1,700,926	7.9	19,747,141	18,459,862	7.0
Paid (270)	736,765	748,265	-1.5	9,245,088	9,259,706	-0.2
SCOTLAND (479)	2,572,506	2,449,191	5.0	28,992,229	27,719,568	4.6
* Free (208) (ex Kelvingrove)	1,505,352	1,700,926	-11.5	18,255,121	18,459,862	-1.1

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 – October 2006/2005 and January-October 2006/2005

LEC	Oct-06	Oct-05	% Change	Jan-Oct06	Jan-Oct05	%Change
Argyll & The Islands (20)	36,882	37,652	-2.0	549,100	589,870	-6.9
Ayrshire (12)	27,892	28,190	-1.1	402,604	410,728	-2.0
Borders (28)	33,354	32,519	2.6	429,659	454,108	-5.4
Caithness & Sutherland (13)	4,409	2,567	71.8	71,247	69,444	2.6
Dumfries & Galloway (35)	44,406	44,888	-1.1	580,633	589,096	-1.4
Dunbartonshire (9)	76,780	85,586	-10.3	882,473	863,448	2.2
Edinburgh & Lothian (59)	569,471	603,244	-5.6	6,252,583	6,011,843	4.0
Fife (27)	46,456	49,670	-6.5	635,491	639,232	-0.6
Forth Valley (24)	107,161	111,652	-4.0	1,280,810	1,278,316	0.2
Glasgow (31)	631,024	304,373	107.3	4,519,911	2,982,168	51.6
Grampian (46)	100,532	102,359	-1.8	1,273,719	1,310,409	-2.8
Inverness & East Highland (23)	83,593	84,284	-0.8	1,046,691	1,042,986	0.4
Lanarkshire (17)	486,177	679,510	-28.5	6,984,466	7,551,478	-7.5
Lochaber (9)	26,907	21,249	26.6	272,847	270,307	0.9
Moray (17)	30,773	30,301	1.6	377,153	384,697	-2.0
Orkney (18)	10,310	10,168	1.4	340,697	353,580	-3.6
Renfrewshire (11)	59,016	36,678	60.9	530,248	515,668	2.8
Shetland (16)	377	597	-36.9	65,682	63,779	3.0
Skye & Wester Ross (11)	12,027	10,669	12.7	193,553	193,227	0.2
Tayside (48)	181,832	169,950	7.0	2,247,698	2,089,280	7.6
Western Isles (5)	3,127	3,085	1.4	54,964	55,904	-1.7
SCOTLAND (479)	2,572,506	2,449,191	5	28,992,229	27,719,568	4.6
* Glasgow (30) (ex Kelvingrove)	300,635	304,373	-1.2	3,027,891	2,982,168	1.5

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 October 2006.

Reasons for positive impacts on visitor figures:-

Special events
Half term school break
Good weather

Reasons for negative impacts in visitor figures:-

Unpredictable weather
Less coach tours
Less cruise liners

*The re-opening of Kelvingrove Museum and Art Gallery in July has had a significant influence in shaping performance for October 2006. Figures have been adjusted in each table and an extra section added to show findings that exclude Kelvingrove Museum and Art Gallery.