

**2007 SCOTTISH VISITOR ATTRACTION BAROMETER
October 2007 REPORT**

Commissioned by VisitScotland

 Conducted by the Moffat Centre for Travel and Tourism
 Business Development, Division of Cultural Business,
 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 2007 with October 2006. Some 523 attraction operators provided figures for the month of October 2007 with 511 attractions providing comparable visits figures.

2.0 October 2007/2006
Summary

The total number of visits representing the 511 barometer attractions in Scotland for the month of October 2007 was 2,811,832. When compared to data from the previous year of 2,877,030 this shows a visits decrease of -2.3%. The total number of visits for the responding 511 barometer attractions in Scotland for the period January-October 2007 was 31,177,392. When compared to data from the previous year of 30,413,821 visits, this shows a visits increase of 1.8%.

The re-opening of Kelvingrove Museum and Art Gallery in July 2006 has had a significant influence in shaping performance for 2007. Figures have been adjusted in each table and an extra section added to show findings that exclude Kelvingrove Museum and Art Gallery. The re-opening of Shetland Museum and Archives has positively impacted on performance for Shetland.

The following table shows total visits recorded for October 2007/2006 and January-October 2007/2006 as well as the % change calculation.

| Attractions | Oct-07 | Oct-06 | % Change | Jan-Oct07 | Jan-Oct06 | %Change |
|----------------------|-----------|-----------|----------|------------|------------|---------|
| 511 | 2,811,832 | 2,877,030 | -2.3 | 31,177,392 | 30,413,821 | 1.8 |
| *510(ex-Kelvingrove) | 2,648,090 | 2,546,641 | 4.0 | 29,164,091 | 29,281,628 | 0.1 |

A further breakdown is shown below, where the visits during the individual months of January-October 2007 with their % change calculations.

| Attractions | Months | Visits | Months | Visits | %Change |
|-----------------------|---------|-----------|---------|-----------|---------|
| 511 | Jan-07 | 1,603,380 | Jan-06 | 1,519,468 | 5.5 |
| | Feb-07 | 1,822,220 | Feb-06 | 1,645,104 | 10.8 |
| | Mar-07 | 2,074,331 | Mar-06 | 1,674,973 | 23.8 |
| | Apr-07 | 3,373,750 | Apr-06 | 3,117,447 | 8.2 |
| | May-07 | 3,358,618 | May-06 | 3,213,787 | 4.5 |
| | June-07 | 3,402,169 | June-06 | 3,333,779 | 2.1 |
| | July-07 | 4,701,631 | July-06 | 4,933,820 | -4.7 |
| | Aug-07 | 4,884,967 | Aug-06 | 5,019,117 | -2.7 |
| | Sep-07 | 3,144,494 | Sep-06 | 3,281,782 | -4.2 |
| | Oct-07 | 2,811,832 | Oct-07 | 2,877,030 | -2.3 |
| *510 (ex-Kelvingrove) | Oct-07 | 2,648,090 | Oct-06 | 2,546,641 | 4.0 |

The highest increase in visits recorded by VisitScotland Region in October 2007 was experienced in Shetland (1,120.3%) followed by Orkney (54.9%) and Perthshire (26.7%). Greater Glasgow experienced the greatest decline in visits over the same period with decreases of -8.8%, followed by Outer Hebrides (-6.7%) and Edinburgh & Lothians (-2.3%).

During this period the highest increase in visits was recorded by the Church/ Abbey/ Cathedral category (24.8%) followed by the Distillery category (15.4%) and the Historic Heritage Site category (15%). Museum/ Art Gallery sites experienced a decline in visits of -16.7%, followed by Wildlife/ Zoo/ Farm/ Nature Reserve sites with a decline of -1.4% when comparing October 2007 with October 2006.

Attractions in Rural locations experienced an increase in visits of 7.1%; whilst visits to attractions in Urban and Seaside locations experienced decreases of -7.7% and -3.7% respectively. Attractions welcoming between 1 and 19,999 visits and 20,000 and 49,999 experienced increases in visits of 31.4% and 5% respectively, while those attracting over 50,000 visits experienced a decrease of -4.5%.

Paid admission attractions experienced an increase in visits of 2.8%, whilst free admission attractions experienced a decrease of -4.4%. The greatest increases in visits by LEC area were experienced by attractions in Shetland (1,120.3%) and Orkney (54.9%). Glasgow experienced the greatest decrease in visits of -27.1% followed by Lochaber who experienced decreases of -15.3% when comparing October 2007 with October 2006.

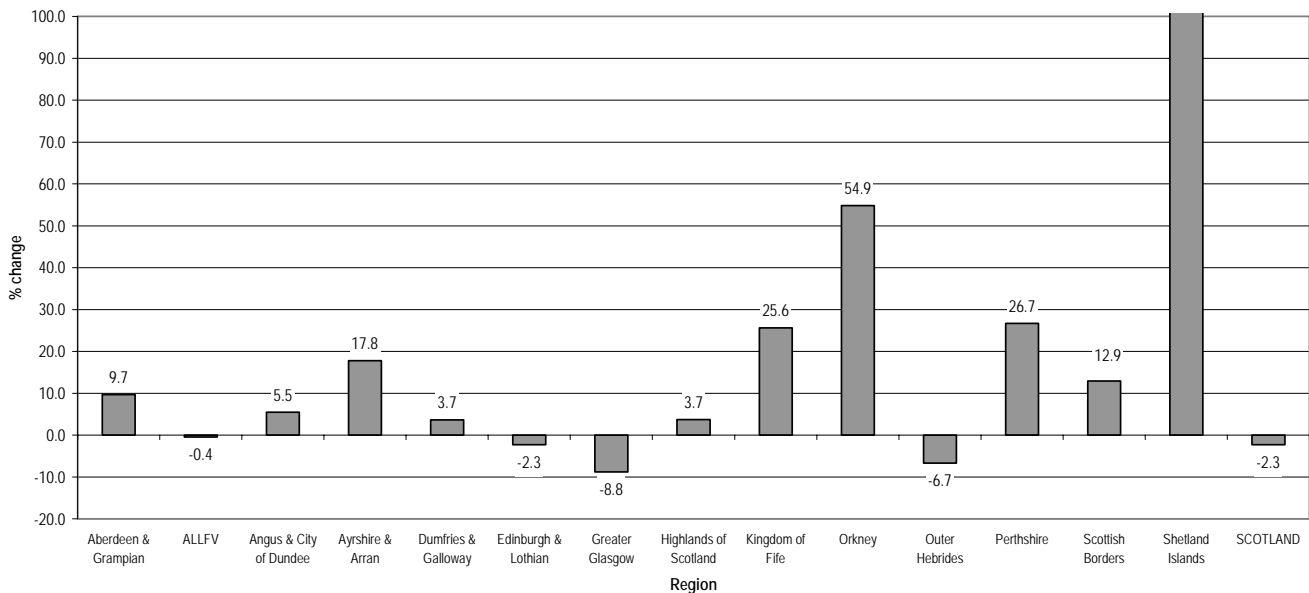
3.0 PERFORMANCE BY VISITSCOTLAND REGION

Performance by VisitScotland Region – October 2007/2006 and January-October 2007/2006

| Region | Oct-07 | Oct-06 | % Change | Jan-Oct07 | Jan-Oct06 | %Change |
|----------------------------------|------------------|------------------|-------------|-------------------|-------------------|------------|
| Aberdeen & Grampian (57) | 118,012 | 107,602 | 9.7 | 1,432,444 | 1,504,095 | -4.76 |
| ALLFV (58) | 176,296 | 177,077 | -0.4 | 2,225,788 | 2,305,563 | -3.46 |
| Angus & City of Dundee (27) | 87,135 | 82,613 | 5.5 | 944,828 | 924,914 | 2.12 |
| Ayrshire & Arran (16) | 71,750 | 60,932 | 17.8 | 805,355 | 738,833 | 9.00 |
| Dumfries & Galloway (39) | 43,195 | 41,672 | 3.7 | 544,708 | 553,268 | -1.55 |
| Edinburgh & Lothian (57) | 621,746 | 636,208 | -2.3 | 6,736,230 | 6,872,173 | -1.98 |
| Greater Glasgow (65) | 1,318,260 | 1,445,367 | -8.8 | 13,855,496 | 13,271,259 | 4.40 |
| Highlands of Scotland (67) | 172,934 | 166,782 | 3.7 | 2,185,454 | 2,136,235 | 2.30 |
| Kingdom of Fife (27) | 43,579 | 34,695 | 25.6 | 512,444 | 511,570 | 0.17 |
| Orkney (19) | 16,802 | 10,850 | 54.9 | 414,421 | 354,956 | 16.75 |
| Outer Hebrides (6) | 3,649 | 3,911 | -6.7 | 62,895 | 68,563 | -8.27 |
| Perthshire (22) | 91,768 | 72,440 | 26.7 | 894,038 | 840,828 | 6.33 |
| Scottish Borders (33) | 41,117 | 36,423 | 12.9 | 452,161 | 462,369 | -2.21 |
| Shetland Islands (18) | 5,589 | 458 | 1,120.3 | 111,130 | 71,681 | 55.03 |
| SCOTLAND (511) | 2,811,832 | 2,877,030 | -2.3 | 31,177,392 | 30,616,307 | 1.8 |
| Greater Glasgow (64)(ex-K'grove) | 1,154,518 | 1,114,978 | 3.5 | 11,842,195 | 11,779,239 | -8.2 |

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

Performance by VisitScotland Region October 2007/2006

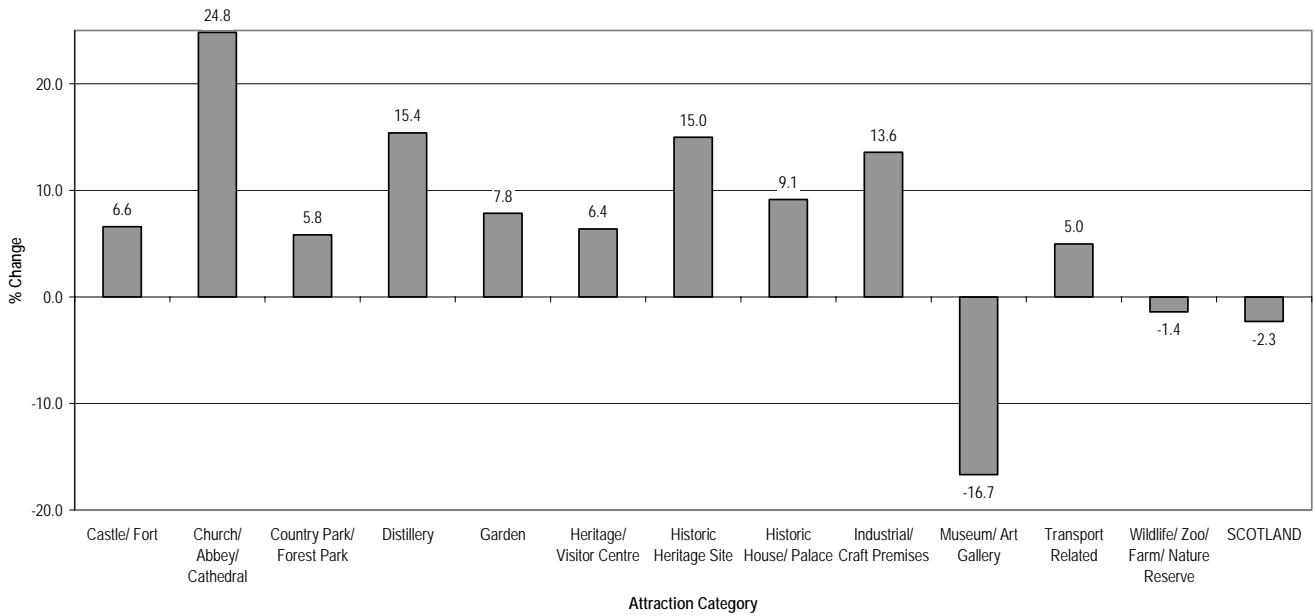


4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – October 2007/2006 and January-October 2007/2006

| Category | Oct-07 | Oct-06 | % Change | Jan-Oct07 | Jan-Oct06 | %Change |
|--|------------------|------------------|-------------|-------------------|-------------------|------------|
| Castle/ Fort (55) | 254,474 | 238,737 | 6.6 | 3,390,965 | 3,389,210 | 0.1 |
| Church/ Abbey/ Cathedral (20) | 87,461 | 70,073 | 24.8 | 1,084,277 | 983,254 | 10.3 |
| Country Park / Forest Park (11) | 791,389 | 747,852 | 5.8 | 8,224,804 | 8,182,108 | 0.5 |
| Distillery (23) | 41,169 | 35,676 | 15.4 | 482,672 | 496,394 | -2.8 |
| Garden (28) | 67,395 | 62,493 | 7.8 | 805,319 | 814,425 | -1.1 |
| Heritage/ Visitor Centre (85) | 344,912 | 324,209 | 6.4 | 3,699,535 | 3,585,623 | 3.2 |
| Historic Heritage Site (39) | 39,382 | 34,248 | 15.0 | 678,395 | 677,108 | 0.2 |
| Historic House/ Palace (39) | 60,867 | 55,766 | 9.1 | 726,805 | 695,687 | 4.5 |
| Industrial/ Craft Premises (10) | 10,184 | 8,967 | 13.6 | 102,390 | 98,599 | 3.8 |
| Museum/ Art Gallery (173) | 934,504 | 1,121,481 | -16.7 | 9,898,948 | 9,592,033 | 3.2 |
| Transport Related (9) | 83,459 | 79,512 | 5.0 | 890,311 | 918,805 | -3.1 |
| Wildlife/ Zoo/ Farm/ Nature Reserve (19) | 96,636 | 98,016 | -1.4 | 1,192,971 | 1,183,061 | 0.8 |
| SCOTLAND (511) | 2,811,832 | 2,877,030 | -2.3 | 31,177,392 | 30,616,307 | 1.8 |
| *Museum/ Art Gallery (172)(ex-K'grove) | 770,762 | 791,092 | -2.6 | 7,885,647 | 8,100,013 | -2.6 |

Performance by Attraction Category October 2007/2006



5.0 **PERFORMANCE BY LOCATION**

Performance by Location – October 2007/2006 and January-October 2007/2006

| Location | Oct-07 | Oct-06 | % Change | Jan-Oct07 | Jan-Oct06 | %Change |
|------------------------------|------------------|------------------|-------------|-------------------|-------------------|------------|
| Rural (227) | 1,108,889 | 1,035,272 | 7.1 | 12,059,426 | 12,046,591 | 0.1 |
| Seaside (58) | 51,426 | 53,414 | -3.7 | 961,787 | 951,160 | 1.1 |
| Urban (225) | 1,651,517 | 1,788,344 | -7.7 | 18,156,179 | 17,618,556 | 3.1 |
| SCOTLAND (511) | 2,811,832 | 2,877,030 | -2.3 | 31,177,392 | 30,616,307 | 1.8 |
| *Urban (224)(ex-Kelvingrove) | 1,487,775 | 1,457,955 | 2.0 | 16,142,878.00 | 16,126,536.00 | 0.1 |

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 2007/2006 and January-October 2007/2006

| Range of Volume of Visits | Oct-07 | Oct-06 | % Change | Jan-Oct07 | Jan-Oct06 | %Change |
|---------------------------------|------------------|------------------|-------------|-------------------|-------------------|------------|
| 1 - 19,999 (316) | 164,668 | 125,297 | 31.4 | 2,152,753 | 2,068,058 | 4.1 |
| 20,000 - 49,999 (81) | 202,395 | 192,809 | 5.0 | 2,392,485 | 2,444,422 | -2.1 |
| 50,000 + (114) | 2,444,769 | 2,558,924 | -4.5 | 26,632,154 | 26,103,827 | 2.0 |
| SCOTLAND (511) | 2,811,832 | 2,877,030 | -2.3 | 31,177,392 | 30,616,307 | 1.8 |
| *50,000 + (113)(ex-Kelvingrove) | 2,281,027 | 2,228,535 | 2.4 | 24,618,853 | 24,611,807 | 0.0 |

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 2007/2006 and January-October 2007/2006

| Admission | Oct-07 | Oct-06 | % Change | Jan-Oct07 | Jan-Oct06 | %Change |
|------------------------------|------------------|------------------|-------------|-------------------|-------------------|------------|
| Free (218) | 1,946,910 | 2,035,767 | -4.4 | 20,928,423 | 20,300,424 | 3.1 |
| Paid (293) | 864,922 | 841,263 | 2.8 | 10,248,969 | 10,315,883 | -0.6 |
| SCOTLAND (511) | 2,811,832 | 2,877,030 | -2.3 | 31,177,392 | 30,616,307 | 1.8 |
| *Free (217) (ex-Kelvingrove) | 1,783,168 | 1,705,378 | 4.6 | 18,915,122 | 18,808,404 | 0.6 |

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 2007/2006 and January-October 2007/2006

| LEC | Oct-07 | Oct-06 | % Change | Jan-Oct07 | Jan-Oct06 | %Change |
|--------------------------------|------------------|------------------|-------------|-------------------|-------------------|------------|
| Argyll & The Islands (24) | 38,390 | 35,993 | 6.7 | 528,680 | 530,326 | -0.3 |
| Ayrshire (15) | 68,559 | 57,568 | 19.1 | 769,739 | 704,686 | 9.2 |
| Borders (33) | 41,117 | 36,423 | 12.9 | 452,161 | 462,369 | -2.2 |
| Caithness & Sutherland (15) | 7,093 | 6,919 | 2.5 | 148,233 | 152,228 | -2.6 |
| Dumfries & Galloway (38) | 41,406 | 41,517 | -0.3 | 540,483 | 550,538 | -1.8 |
| Dunbartonshire (7) | 19,102 | 22,331 | -14.5 | 372,967 | 383,443 | -2.7 |
| Edinburgh & Lothians (57) | 621,746 | 636,208 | -2.3 | 6,736,230 | 6,872,173 | -2.0 |
| Fife (27) | 43,579 | 34,695 | 25.6 | 512,444 | 511,570 | 0.2 |
| Forth Valley (28) | 168,865 | 159,284 | 6.0 | 1,823,215 | 1,819,841 | 0.2 |
| Glasgow (32) | 478,785 | 656,954 | -27.1 | 5,162,573 | 4,674,228 | 10.4 |
| Grampian (45) | 98,342 | 91,756 | 7.2 | 1,190,221 | 1,269,792 | -6.3 |
| Inverness & East Highland (26) | 109,675 | 96,644 | 13.5 | 1,205,945 | 1,161,410 | 3.8 |
| Lanarkshire (21) | 739,453 | 687,571 | 7.5 | 7,619,893 | 7,591,823 | 0.4 |
| Lochaber (11) | 24,066 | 28,428 | -15.3 | 297,889 | 296,949 | 0.3 |
| Moray (15) | 19,415 | 18,911 | 2.7 | 272,248 | 267,488 | 1.8 |
| Orkney (19) | 16,802 | 10,850 | 54.9 | 414,421 | 354,956 | 16.8 |
| Renfrewshire (12) | 55,308 | 64,226 | -13.9 | 601,243 | 599,930 | 0.2 |
| Shetland (18) | 5,589 | 458 | 1,120.3 | 111,130 | 71,681 | 55.0 |
| Skye & Wester Ross (12) | 29,472 | 28,967 | 1.7 | 469,987 | 461,111 | 1.9 |
| Tayside (50) | 181,419 | 157,416 | 15.2 | 1,884,795 | 1,811,202 | 4.1 |
| Western Isles (6) | 3,649 | 3,911 | -6.7 | 62,895 | 68,563 | -8.3 |
| SCOTLAND (511) | 2,811,832 | 2,877,030 | -2.3 | 31,177,392 | 30,616,307 | 1.8 |
| *Glasgow (31)(ex-Kelvingrove) | 315,043 | 326,565 | -3.5 | 3,149,272 | 3,182,208 | -1.0 |

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 influences on visitation performance during the month of October 2007.

| Reasons for positive impacts on visitor figures:- | Reasons for negative impacts in visitor figures:- |
|---|--|
| Increased PR coverage Improved signage Half-term school break More UK visitors Good weather | Fewer US visitors Security issues Staffing issues Access restrictions |

- The re-opening of Kelvingrove Museum and art Gallery in July 2006 has had a significant influence in shaping performance for 2007. Figures have been adjusted in each table and an extra section added to show findings that exclude Kelvingrove Museum and Art Gallery.
- The re-opening of Shetland Museum and Archives has positively impacted on performance for Shetland.