

2006 SCOTTISH VISITOR ATTRACTION BAROMETER August 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 August 2006 with August 2005. Some 534 attraction operators provided figures for the month of August 2006 with 510 attractions providing comparable visits figures.

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 AUGUST 2006/2005

Summary

The total number of visits representing the 510 barometer attractions in Scotland for the month of August 2006 was **4,941,227**. When compared to data from the previous year of **4,658,854** this shows a visits increase of **6.1%**. The total number of visits for the responding 510 barometer attractions in Scotland for the period January-August 2006 was **23,917,971**. When compared to data from the previous year of **22,990,086** visits, this shows a visits increase of **4.0%**.

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

Attractions	Aug-06	Aug-05	% Change	Jan-Aug06	Jan-Aug05	%Change
510	4,941,227	4,658,854	6.1	23,917,971	22,990,086	4.0

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

Attractions	Months	Visits	Months	Visits	%Change
510	Jan-06	1,542,052	Jan-05	1,305,554	18.1
	Feb-06	1,644,876	Feb-05	1,572,679	4.6
	Mar-06	1,681,204	Mar-05	2,156,213	-22.0
	Apr-06	3,083,548	Apr-05	2,674,767	15.3
	May-06	2,858,105	May-05	3,021,707	-5.4
	Jun-06	3,335,398	Jun-05	3,325,334	0.3
	Jul-06	4,831,561	Jul-05	4,274,978	13.0
	Aug-06	4,941,227	Aug-05	4,658,854	6.1

The highest increase in visits recorded by VisitScotland Region in August 2006 was experienced in Greater Glasgow (20.7%) and Angus & City of Dundee (8.4%). The Scottish Borders experienced the greatest decline in visits over the same period with decreases of -8.1%. The Shetland Islands and Perthshire also experienced decreases in visits figures of -6.9% and -4.9% respectively.

During this period the highest increase in visits was recorded by Museum/ Art Gallery category (34%) followed by Church/ Abbey/ Cathedral sites (12.5%). The Country Park/ Forest Park category experienced a decline in visits of -10.1%, followed by the Garden category with a decline of -7.4% and Industrial/ Craft Premises Category experiencing a decline of -6.9%, comparing August 2006 and August 2005.

Attractions in Urban locations experienced an increase in visits of 15.3%, whilst visits to attractions in Rural and Seaside locations experienced decreases of -5.1% and -0.5% respectively. Attractions welcoming over 50,000 visits experienced the greatest increase in visits of 7.6%, with those attracting between 1 and 19,999 visits experiencing an increase of 0.5%. Attractions welcoming between 20,000 and 49,999 visits experienced a decline of -0.8% when comparing August 2006 with August 2005.

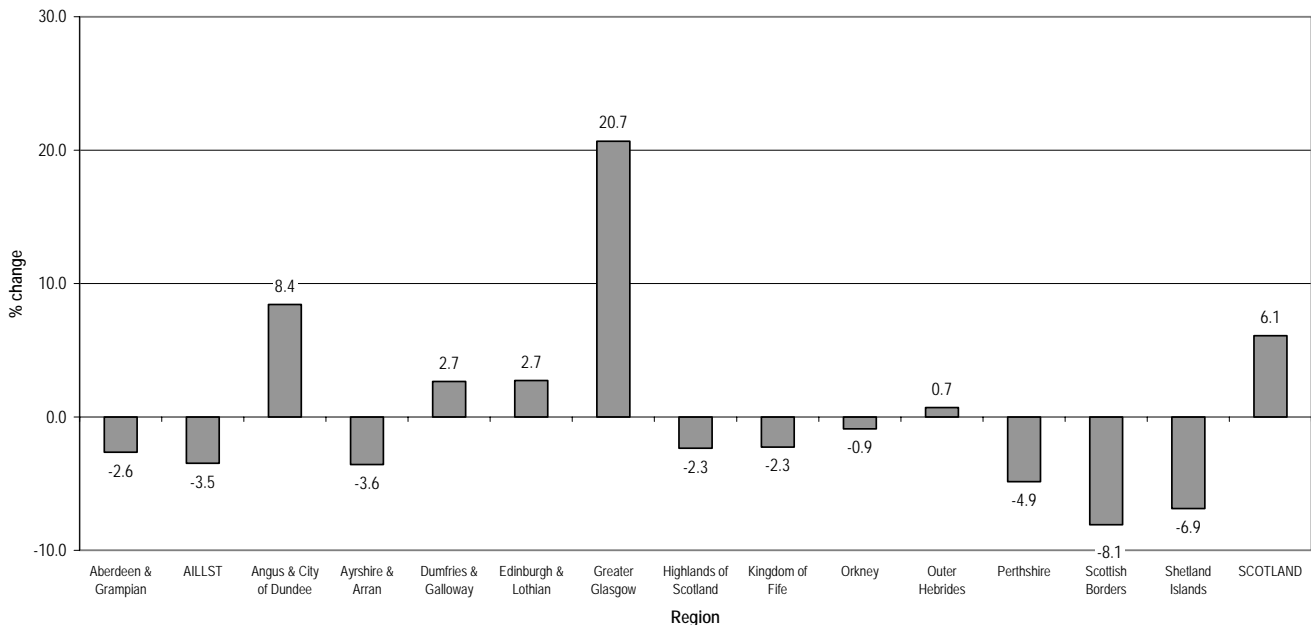
Free admission attractions experienced an increase in visits of 12.4%, whilst Paid admission attractions saw a decrease in visits of -2.9%. The highest increases in visits by LEC area were experienced by attractions in Glasgow (106%), Caithness & Sutherland (5.6%) and Tayside (3.8%), whereas Lanarkshire; Argyll & The Islands and Borders experienced decreases in visits of -14.4%; -9.1% and -8.1% respectively.

3.0 PERFORMANCE BY VISITSCOTLAND REGION
Performance by VisitScotland Region – August 2006/2005 and January-August 2006/2005

Region	Aug-06	Aug-05	% Change	Jan-Aug06	Jan-Aug05	%Change
Aberdeen & Grampian (64)	284,563	292,294	-2.6	1,377,903	1,412,293	-2.4
AILLST (59)	447,652	463,748	-3.5	1,919,267	1,882,796	1.9
Angus & City of Dundee (28)	246,208	227,077	8.4	1,240,624	1,096,249	13.2
Ayrshire & Arran (16)	123,127	127,671	-3.6	598,090	582,106	2.7
Dumfries & Galloway (37)	141,336	137,679	2.7	539,733	532,550	1.3
Edinburgh & Lothian (58)	1,134,763	1,104,676	2.7	5,006,092	4,788,165	4.6
Greater Glasgow (62)	1,679,446	1,391,955	20.7	9,858,610	9,270,734	6.3
Highlands of Scotland (69)	421,932	432,027	-2.3	1,564,665	1,566,700	-0.1
Kingdom of Fife (28)	119,197	121,948	-2.3	521,113	521,084	0.0
Orkney (19)	84,773	85,547	-0.9	291,068	305,995	-4.9
Outer Hebrides (5)	11,117	11,039	0.7	45,612	45,936	-0.7
Perthshire (22)	146,599	154,084	-4.9	535,104	545,152	-1.8
Scottish Borders (29)	83,595	90,942	-8.1	358,082	379,922	-5.7
Shetland Islands (15)	16,919	18,167	-6.9	62,008	60,404	2.7
SCOTLAND (510)	4,941,227	4,658,854	6.1	23,917,971	22,990,086	4.0

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

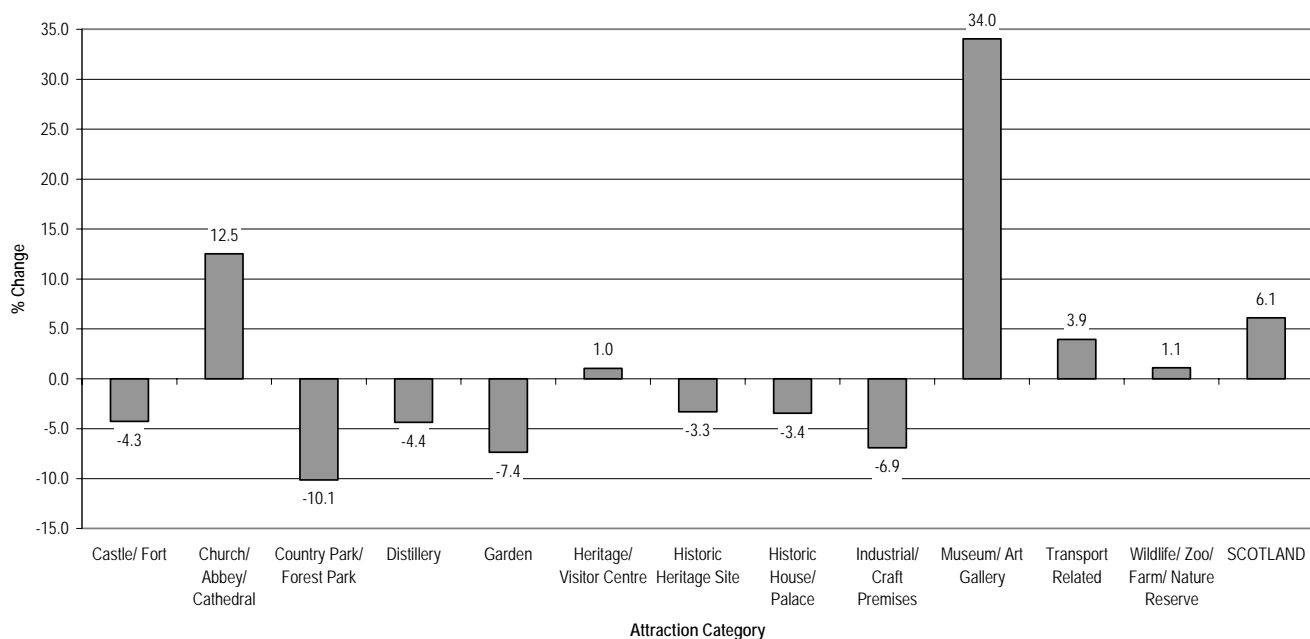
Performance by VisitScotland Region August 2006/2005


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

Category	Aug-06	Aug-05	% Change	Jan-Aug06	Jan-Aug05	%Change
Castle/ Fort (63)	653,297	682,431	-4.3	2,663,164	2,610,705	2.0
Church/ Abbey/ Cathedral (13)	103,030	91,571	12.5	440,363	364,473	20.8
Country Park / Forest Park (13)	988,008	1,099,375	-10.1	7,209,573	7,356,236	-2.0
Distillery (23)	89,295	93,369	-4.4	295,262	311,270	-5.1
Garden (28)	121,987	131,671	-7.4	669,705	710,617	-5.8
Heritage/ Visitor Centre (80)	582,985	577,094	1.0	2,605,421	2,555,567	2.0
Historic Heritage Site (38)	157,441	162,825	-3.3	577,508	557,456	3.6
Historic House/ Palace (42)	169,585	175,637	-3.4	685,955	708,194	-3.1
Industrial/ Craft Premises (11)	29,052	31,211	-6.9	135,255	148,976	-9.2
Museum/ Art Gallery (170)	1,670,939	1,246,559	34.0	7,021,129	6,113,605	14.8
Transport Related (8)	163,152	156,967	3.9	614,806	626,305	-1.8
Wildlife / Zoo / Farm / Nature Reserve (21)	212,456	210,144	1.1	999,830	926,682	7.9
SCOTLAND (510)	4,941,227	4,658,854	6.1	23,917,971	22,990,086	4.0

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

Performance by Attraction Category August 2006/2005



5.0 PERFORMANCE BY LOCATION

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

Location	Aug-06	Aug-05	% Change	Jan-Aug06	Jan-Aug05	%Change
Rural (227)	1,822,790	1,920,230	-5.1	9,751,913	9,754,421	0.0
Seaside (63)	241,260	242,479	-0.5	881,075	868,095	1.5
Urban (220)	2,877,177	2,496,145	15.3	13,284,983	12,367,570	7.4
SCOTLAND (510)	4,941,227	4,658,854	6.1	23,917,971	22,990,086	4.0

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

6.0 PERFORMANCE BY VOLUME OF VISITS

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

Range of Volume of Visits	Aug-06	Aug-05	% Change	Jan-Aug06	Jan-Aug05	%Change
1 - 19,999 (318)	485,862	483,350	0.5	1,878,027	1,844,674	1.8
20,000 - 49,999 (78)	460,628	464,237	-0.8	1,906,721	1,875,212	1.7
50,000 + (114)	3,994,737	3,711,267	7.6	20,133,223	19,270,200	4.5
SCOTLAND (510)	4,941,227	4,658,854	6.1	23,917,971	22,990,086	4.0

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 – August 2006/2005 and January-August 2006/2005

Admission	Aug-06	Aug-05	% Change	Jan-Aug06	Jan-Aug05	%Change
Free (223)	3,066,247	2,727,469	12.4	15,977,061	15,106,661	5.8
Paid (287)	1,874,980	1,931,385	-2.9	7,940,910	7,883,425	0.7
SCOTLAND (510)	4,941,227	4,658,854	6.1	23,917,971	22,990,086	4.0

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 – August 2006/2005 and January-August 2006/2005

LEC	Aug-06	Aug-05	% Change	Jan-Aug06	Jan-Aug05	%Change
Argyll & The Islands (27)	126,828	139,502	-9.1	464,014	504,038	-7.9
Ayrshire (15)	115,121	119,045	-3.3	571,560	553,094	3.3
Borders (29)	83,595	90,942	-8.1	358,082	379,922	-5.7
Caithness & Sutherland (17)	51,257	48,554	5.6	159,573	150,315	6.2
Dumfries & Galloway (37)	141,336	137,679	2.7	539,733	532,550	1.3
Dunbartonshire (9)	137,546	136,545	0.7	707,696	691,026	2.4
Edinburgh & Lothian (57)	1,130,965	1,100,933	2.7	4,985,690	4,775,021	4.4
Fife (28)	119,197	121,948	-2.3	521,113	521,084	0.0
Forth Valley (27)	251,720	266,520	-5.6	1,178,310	1,142,852	3.1
Glasgow (30)	810,661	393,554	106.0	3,227,160	2,327,855	38.6
Grampian (49)	208,161	215,671	-3.5	1,076,875	1,105,413	-2.6
Inverness & East Highland (26)	252,211	258,474	-2.4	966,643	961,681	0.5
Lanarkshire (18)	744,147	869,826	-14.4	5,822,270	6,107,719	-4.7
Lochaber (10)	57,756	60,171	-4.0	217,885	218,952	-0.5
Moray (18)	83,415	84,280	-1.0	325,018	333,019	-2.4
Orkney (19)	84,773	85,547	-0.9	291,068	305,995	-4.9
Renfrewshire (11)	65,433	65,798	-0.6	417,689	433,189	-3.6
Shetland (15)	16,919	18,167	-6.9	62,008	60,404	2.7
Skye & Wester Ross (12)	45,702	45,970	-0.6	166,308	168,911	-1.5
Tayside (51)	403,367	388,689	3.8	1,813,664	1,671,110	8.5
Western Isles (5)	11,117	11,039	0.7	45,612	45,936	-0.7
SCOTLAND (510)	4,941,227	4,658,854	6.1	23,917,971	22,990,086	4.0

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 August 2006.

The following quotes have been drawn from comments made by other operators to explain the reasons that have impacted on visitation performance during August 2006.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Special event increased numbers	Unpredictable weather
Poorer weather increased visits to indoor attractions	Less coach tours
Popular exhibition	High fuel prices
New Signage	Strong pound