

## 2007 SCOTTISH VISITOR ATTRACTION BAROMETER July 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](mailto:mma4@qcal.ac.uk)).

This Barometer compares the period of July 2007 with July 2006. Some 542 attraction operators provided figures for the month of July 2007 with 527 attractions providing comparable visits figures.

The VisitScotland Region of Argyll, The Isles, Loch Lomond, Stirling and the Trossachs (ALLST) has been changed to Argyll, Loch Lomond and Forth Valley (ALLFV).

### 2.0 July 2007/2006 Summary

The total number of visits representing the 527 barometer attractions in Scotland for the month of July 2007 was **4,651,804**. When compared to data from the previous year of **4,877,901** this shows a visits decrease of **-4.6%**. The total number of visits for the responding 527 barometer attractions in Scotland for the period January-July 2007 was **19,944,979**. When compared to data from the previous year of **18,981,923** visits, this shows a visits increase of **5.1%**.

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 July 2007/2006 and January-July 2007/2006 as well as the % change calculation.

Attractions	July-07	July-06	% Change	Jan-July07	Jan-July06	%Change
527	4,651,804	4,877,901	-4.6	19,944,979	18,981,923	5.1
*526 (ex-Kelvingrove)	4,400,231	4,463,625	-1.4	18,462,281	18,567,647	-0.6

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

Attractions	Months	Visits	Months	Visits	%Change
527	Jan-07	1,512,949	Jan-06	1,405,502	7.6
	Feb-07	1,744,201	Feb-06	1,565,475	11.4
	Mar-07	1,986,294	Mar-06	1,593,734	24.6
	Apr-07	3,362,303	Apr-06	3,094,696	8.6
	May-07	3,318,955	May-06	3,164,730	4.9
	June-07	3,368,473	June-06	3,279,885	2.7
	July-07	4,651,804	July-06	4,877,901	-4.6
*526 (ex-Kelvingrove)	July-07	4,400,231	July-06	4,463,625	-1.4

The highest increase in visits recorded by VisitScotland Region in July 2007 was experienced in Shetland (46.9%) followed by Ayrshire and Arran (10.0%); Outer Hebrides (7.8%) and Orkney (7.7%). Aberdeen & Grampian experienced the greatest decline in visits over the same period with decreases of -13.5% followed by Greater Glasgow (-9.3%).

During this period the highest increase in visits was recorded by the Historic House/ Palace category (10.9%) followed by Heritage/ Visitor Centre (4.1%). Industrial/ Craft Premises sites experienced a decline in visits of -22.7%, followed by Garden sites and Wildlife/ Zoo/ Farm/ Nature Reserve sites with declines of -14.2% and -9.2% respectively when comparing July 2007 with July 2006.

Attractions in Seaside locations experienced an increase in visits of 5.6%; whilst visits to attractions in Urban and Rural locations experienced decreases of -6.4% and -3.6% respectively. Attractions welcoming between 1 and 19,999 visits experienced an increase in visits of 0.9%, with those attracting 50,000 and over and between 20,000 and 49,999 visits experienced decreases of -5.4% and -2.9% respectively.

Both Free and Paid admission attractions experienced a decrease in visits. Free admission attractions experienced a decrease of -6.5% whilst Paid admission attractions experienced a decrease of -1.7%. The highest increases in visits by LEC area were experienced by attractions in Shetland (46.9%); Renfrewshire (23.7%) and Lochaber (14.1%). Glasgow experienced the greatest decrease in visits of -16.2% followed by Grampian and Fife who experienced decreases of -15.4% and -7.5% respectively when comparing July 2007 with July 2006. Worth noting also Edinburgh & Lothian experienced a decrease in visits of 3% when comparing July 2007 with July 2006.

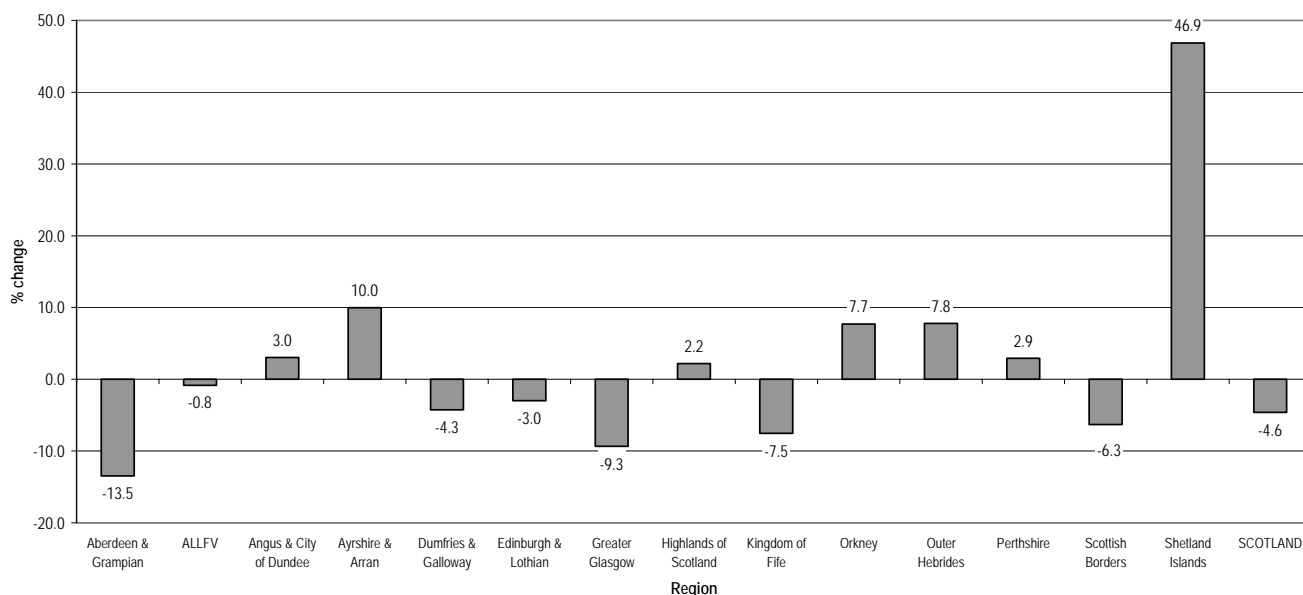
**3.0 PERFORMANCE BY VISITSCOTLAND REGION**

## Performance by VisitScotland Region – July 2007/2006 and January-July 2007/2006

Region	July-07	July-06	% Change	Jan-July07	Jan-July06	%Change
Aberdeen & Grampian (66)	255,636	295,486	-13.5	1,005,115	1,056,103	-4.8
ALLFV (60)	391,543	394,881	-0.8	1,421,786	1,470,288	-3.3
Angus & City of Dundee (26)	175,811	170,619	3.0	775,165	748,083	3.6
Ayrshire & Arran (17)	149,173	135,625	10.0	540,271	501,262	7.8
Dumfries & Galloway (40)	112,349	117,347	-4.3	377,676	388,380	-2.8
Edinburgh & Lothian (54)	805,483	830,359	-3.0	3,515,285	3,501,618	0.4
Greater Glasgow (61)	1,840,573	2,030,158	-9.3	9,325,248	8,381,987	11.3
Highlands of Scotland (72)	464,680	454,763	2.2	1,486,140	1,456,444	2.0
Kingdom of Fife (30)	100,507	108,702	-7.5	371,671	370,765	0.2
Orkney (20)	92,206	85,617	7.7	223,820	218,848	2.3
Outer Hebrides (6)	16,524	15,328	7.8	50,380	45,675	10.3
Perthshire (23)	144,569	140,455	2.9	508,882	507,140	0.3
Scottish Borders (35)	74,043	79,015	-6.3	278,409	292,572	-4.8
Shetland (17)	28,707	19,546	46.9	65,131	42,758	52.3
<b>SCOTLAND (527)</b>	<b>4,651,804</b>	<b>4,877,901</b>	<b>-4.6</b>	<b>19,944,979</b>	<b>18,981,923</b>	<b>5.1</b>
*Greater Glasgow (60)(ex-K'grove)	1,589,000	1,615,882	-1.7	7,842,550	7,967,711	-1.6

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

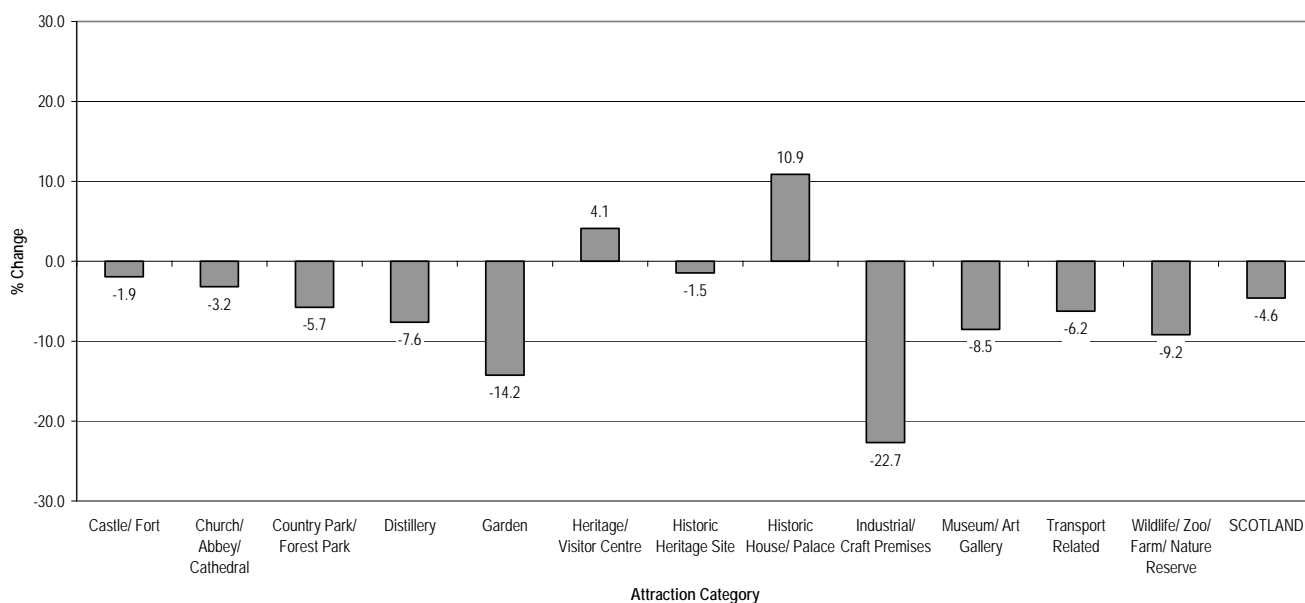
Performance by VisitScotland Region July 2007/2006


**4.0 PERFORMANCE BY ATTRACTION CATEGORY**

## Performance by Attraction Category – July 2007/2006 and January-July 2007/2006

Category	July-07	July-06	% Change	Jan-July07	Jan-July06	%Change
Castle/ Fort (58)	641,231.00	653,819.00	-1.9	2,089,080	2,106,795	-0.8
Church/ Abbey/ Cathedral (19)	175,646	181,423	-3.2	612,987	590,305	3.8
Country Park / Forest Park (11)	1,107,465	1,174,977	-5.7	5,657,030	5,770,354	-2.0
Distillery (25)	82,532	89,343	-7.6	290,388	298,159	-2.6
Garden (28)	121,610	141,799	-14.2	532,800	545,756	-2.4
Heritage/ Visitor Centre (88)	635,999	610,812	4.1	2,444,126	2,373,606	3.0
Historic Heritage Site (39)	133,964	135,953	-1.5	400,887	400,790	0.0
Historic House/ Palace (40)	146,916	132,516	10.9	438,633	414,257	5.9
Industrial/ Craft Premises (10)	13,862	17,928	-22.7	62,301	59,582	4.6
Museum/ Art Gallery (176)	1,235,071	1,350,176	-8.5	5,989,238	4,999,856	19.8
Transport Related (11)	130,672	139,369	-6.2	543,153	576,759	-5.8
Wildlife/ Zoo/ Farm/ Nature Reserve (22)	226,836	249,786	-9.2	884,356	845,704	4.6
<b>SCOTLAND (527)</b>	<b>4,651,804</b>	<b>4,877,901</b>	<b>-4.6</b>	<b>19,944,979</b>	<b>18,981,923</b>	<b>5.1</b>
*Museum/ Art Gallery (175)(ex-Kelvingrove)	983,498	935,900	5.1	4,506,540	4,585,580	-1.7

Performance by Attraction Category July 2007/2006



## 5.0 PERFORMANCE BY LOCATION

### Performance by Location – July 2007/2006 and January-July 2007/2006

Location	July-07	July-06	% Change	Jan-July07	Jan-July06	%Change
Rural (241)	1,953,998	2,027,443	-3.6	7,994,767	8,142,684	-1.8
Seaside (64)	251,385	237,956	5.6	798,294	778,237	2.6
Urban (222)	2,446,421	2,612,502	-6.4	11,151,918	10,061,002	10.8
<b>SCOTLAND (527)</b>	<b>4,651,804</b>	<b>4,877,901</b>	<b>-4.6</b>	<b>19,944,979</b>	<b>18,981,923</b>	<b>5.1</b>
*Urban (221)(ex-Kelvingrove)	2,194,848	2,198,226	-0.2	9,669,220	9,646,726	0.2

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 2007/2006 and January-July 2007/2006

Range of Volume of Visits	July-07	July-06	% Change	Jan-July07	Jan-July06	%Change
1 - 19,999 (323)	422,949	418,970	0.9	1,327,249	1,292,033	2.7
20,000 - 49,999 (87)	453,144	466,918	-2.9	1,554,452	1,611,689	-3.6
50,000 + (117)	3,775,711	3,992,013	-5.4	17,063,278	16,078,201	6.1
<b>SCOTLAND (527)</b>	<b>4,651,804</b>	<b>4,877,901</b>	<b>-4.6</b>	<b>19,944,979</b>	<b>18,981,923</b>	<b>5.1</b>
*50,000 + (116)(ex-Kelvingrove)	3,524,138	3,577,737	-1.5	15,580,580	15,663,925	-0.5

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 2007/2006 and January-July 2007/2006

Admission	July-07	July-06	% Change	Jan-July07	Jan-July06	%Change
Free (218)	2,798,645	2,992,928	-6.5	13,315,414	12,288,697	8.4
Paid (309)	1,853,159	1,884,973	-1.7	6,629,565	6,693,226	-1.0
<b>SCOTLAND (527)</b>	<b>4,651,804</b>	<b>4,877,901</b>	<b>-4.6</b>	<b>19,944,979</b>	<b>18,981,923</b>	<b>5.1</b>
*Free (217)(ex-Kelvingrove)	2,547,072	2,578,652	-1.2	11,832,716	11,874,421	-0.4

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 2007/2006 and January-July 2007/2006

LEC	July-07	July-06	% Change	Jan-July07	Jan-July06	%Change
Argyll & The Islands (27)	114,759	118,042	-2.8	359,142	362,038	-0.8
Ayrshire (16)	141,380	127,607	10.8	520,577	482,738	7.8
Borders (35)	74,043	79,015	-6.3	278,409	292,572	-4.8
Caithness & Sutherland (14)	30,487	27,977	9.0	73,076	71,674	2.0
Dumfries & Galloway (39)	111,765	116,778	-4.3	376,080	386,776	-2.8
Dunbartonshire (7)	68,847	69,151	-0.4	242,136	229,260	5.6
Edinburgh & Lothian (54)	805,483	830,359	-3.0	3,515,285	3,501,618	0.4
Fife (30)	100,507	108,702	-7.5	371,671	370,765	0.2
Forth Valley (28)	291,114	283,612	2.6	1,125,871	1,142,877	-1.5
Glasgow (32)	692,773	827,156	-16.2	3,573,783	2,538,737	40.8
Grampian (52)	210,895	249,393	-15.4	858,016	908,203	-5.5
Inverness & East Highland (29)	223,790	229,172	-2.3	777,681	757,823	2.6
Lanarkshire (18)	1,027,518	1,098,793	-6.5	5,286,437	5,433,382	-2.7
Lochaber (11)	52,692	46,169	14.1	169,087	171,030	-1.1
Moray (16)	49,330	50,427	-2.2	162,930	161,486	0.9
Orkney (20)	92,206	85,617	7.7	223,820	218,848	2.3
Renfrewshire (11)	44,313	35,824	23.7	176,714	161,100	9.7
Shetland (17)	28,707	19,546	46.9	65,131	42,758	52.3
Skye & Wester Ross (15)	145,778	139,248	4.7	426,923	419,966	1.7
Tayside (50)	328,893	319,985	2.8	1,311,830	1,282,597	2.3
Western Isles (6)	16,524	15,328	7.8	50,380	45,675	10.3
<b>SCOTLAND (527)</b>	<b>4,651,804</b>	<b>4,877,901</b>	<b>-4.6</b>	<b>19,944,979</b>	<b>18,981,923</b>	<b>5.1</b>
*Glasgow (31)(ex-Kelvingrove)	441,200	412,880	6.9	2,091,085	2,124,461	-1.6

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 July 2007.

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

Bad weather increased visits to some indoor attractions  
 Improved signage  
 Increase in group bookings

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

Bad weather affected visits to Garden attractions  
 Staff illness  
 Road works  
 Fewer overseas visitors  
 Security issues

\* 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