



**2006 SCOTTISH VISITOR ATTRACTION BAROMETER
June 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 June 2006 with June 2005. Some 521 attraction operators provided figures for the month of June 2006 with 503 attractions providing comparable visits figures.

The VisitScotland Region Western Isles has been changed to Outer Hebrides.

2.0 JUNE 2006/2005

Summary

The total number of visits representing the 503 barometer attractions in Scotland for the month of June 2006 was **3,292,823**. When compared to data from the previous year of **3,289,963** this shows a visits increase of **0.1%**. The total number of visits for the responding 503 barometer attractions in Scotland for the period January-June 2006 was **13,901,360**. When compared to data from the previous year of **13,830,859** visits, this shows a visits increase of **0.5%**.

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

Attractions	Jun-06	Jun-05	% Change	Jan-Jun06	Jan-Jun05	%Change
503	3,292,823	3,289,963	0.1	13,901,360	13,830,859	0.5

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

Attractions	Months	Visits	Months	Visits	%Change
503	Jan-06	1,495,333	Jan-05	1,262,483	18.4
	Feb-06	1,607,082	Feb-05	1,544,579	4.0
	Mar-06	1,656,208	Mar-05	2,116,247	-21.7
	Apr-06	3,016,566	Apr-05	2,633,816	14.5
	May-06	2,833,348	May-05	2,983,771	-5.0
	Jun-06	3,292,823	Jun-05	3,289,963	0.1

The highest increase in visits recorded by VisitScotland Region in June 2006 was experienced in Angus & City of Dundee (6.1%) and Dumfries and Galloway (5.2%). The Outer Hebrides experienced the greatest decline in visits over the same period with decreases of -11.9%. Shetland Islands and Orkney also experienced decreases in visits figures of -9.7% and -8.8% respectively.

During this period the highest increase in visits was recorded by Church/ Abbey/ Cathedral category (19.7%) followed by Wildlife/ Zoo/ Farm/ Nature Reserve sites (18.4%). The Industrial/ Craft Premises category experienced a decline in visits of -25.5%, followed by the Transport Related category with a decline of -6.6% and Museum/ Art Gallery category experiencing a decline of -6.2%, comparing June 2006 and June 2005.

Attractions in Rural locations saw an increase in visits of 3.5%, whilst visits to attractions in Urban and Seaside locations experienced decreases in visits of -2.7% and -1.4% respectively. Attractions welcoming between 1 and 19,999 experienced the greatest increase in visits of 2.3%, with those attracting between 20,000 and 49,999 visits experiencing an increase of 1.3%. Those attracting over 50,000 visits saw a decrease in visits of -0.3% when comparing June 2006 with June 2005.

Free admission attractions experienced an increase in visits of 0.8%, whilst Paid admission attractions saw a decrease in visits of -1.2%.

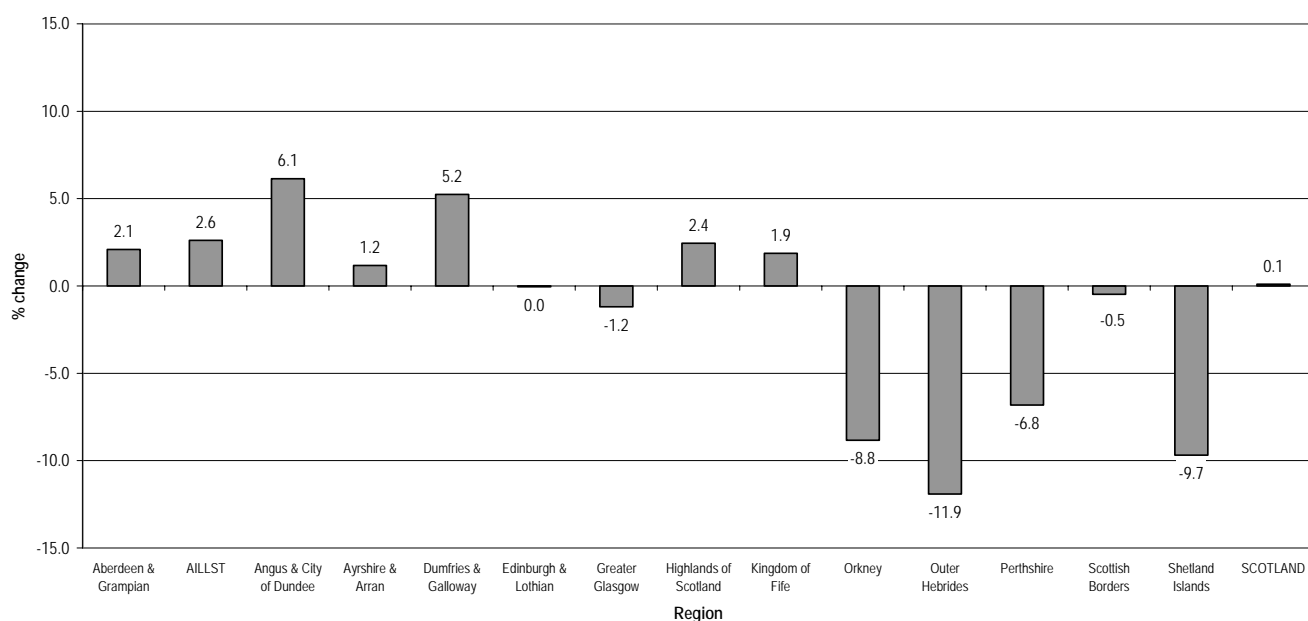
The highest increases in visits by LEC area were experienced by attractions in Skye and Lochalsh (12.3%), Dunbartonshire (8.4%) and Forth Valley (8.2%), whereas Western Isles; Shetland and Glasgow experienced decreases in visits of -11.9%; -9.7% and -9.4 % respectively.

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

Region	Jun-06	Jun-05	% Change	Jan-Jun06	Jan-Jun05	%Change
Aberdeen & Grampian (59)	220,802	216,296	2.1	837,110	868,105	-3.6
ALLST (57)	292,611	285,158	2.6	987,189	938,521	5.2
Angus & City of Dundee (29)	177,837	167,549	6.1	782,762	687,349	13.9
Ayrshire & Arran (12)	69,586	68,784	1.2	201,566	201,360	0.1
Dumfries & Galloway (36)	83,558	79,394	5.2	280,451	277,106	1.2
Edinburgh & Lothian (59)	579,097	579,362	0.0	2,792,178	2,731,597	2.2
Greater Glasgow (62)	1,309,829	1,325,592	-1.2	6,333,480	6,463,278	-2.0
Highlands of Scotland (66)	246,918	241,027	2.4	735,532	704,966	4.3
Kingdom of Fife (28)	80,660	79,181	1.9	291,322	288,996	0.8
Orkney (18)	58,187	63,823	-8.8	122,810	123,249	-0.4
Outer Hebrides (5)	10,707	12,156	-11.9	29,950	30,532	-1.9
Perthshire (22)	91,903	98,618	-6.8	283,356	282,569	0.3
Scottish Borders (32)	55,988	56,259	-0.5	197,994	206,418	-4.1
Shetland Islands (18)	15,140	16,764	-9.7	25,660	26,813	-4.3
SCOTLAND (503)	3,292,823	3,289,963	0.1	13,901,360	13,830,859	0.5

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

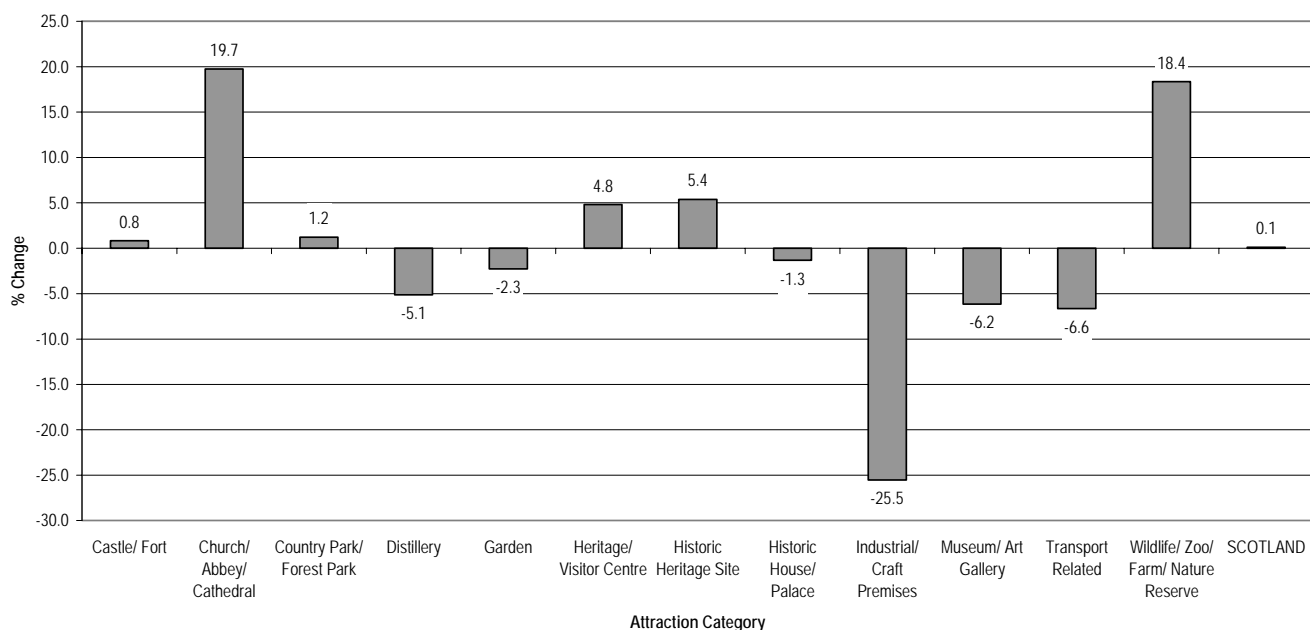
Performance by Region June 2006/2005


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

Category	Jun-06	Jun-05	% Change	Jan-Jun06	Jan-Jun05	%Change
Castle/ Fort (63)	432,374	428,856	0.8	1,405,801	1,338,285	5.0
Church/ Abbey/ Cathedral (13)	73,061	61,016	19.7	239,239	200,103	19.6
Country Park / Forest Park (12)	1,038,271	1,025,675	1.2	4,768,765	4,919,932	-3.1
Distillery (20)	38,195	40,260	-5.1	109,627	107,258	2.2
Garden (27)	116,687	119,415	-2.3	401,411	438,851	-8.5
Heritage/ Visitor Centre (83)	457,316	436,283	4.8	1,587,572	1,510,239	5.1
Historic Heritage Site (38)	99,310	94,236	5.4	281,711	254,914	10.5
Historic House/ Palace (42)	125,472	127,160	-1.3	427,377	431,048	-0.9
Industrial/ Craft Premises (12)	18,906	25,390	-25.5	81,606	86,823	-6.0
Museum/ Art Gallery (164)	712,351	759,039	-6.2	3,967,351	3,929,208	1.0
Transport Related (8)	87,531	93,763	-6.6	344,120	347,178	-0.9
Wildlife / Zoo / Farm / Nature Reserve (21)	93,349	78,870	18.4	286,780	267,020	7.4
SCOTLAND (503)	3,292,823	3,289,963	0.1	13,901,360	13,830,859	0.5

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

Performance by Attraction Category June 2006/2005



5.0 PERFORMANCE BY LOCATION

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

Location	Jun-06	Jun-05	% Change	Jan-Jun06	Jan-Jun05	%Change
Rural (226)	1,495,009	1,444,368	3.5	5,762,763	5,736,668	0.5
Seaside (62)	146,917	149,042	-1.4	428,873	406,474	5.5
Urban (215)	1,650,897	1,696,553	-2.7	7,709,724	7,687,717	0.3
SCOTLAND (503)	3,292,823	3,289,963	0.1	13,901,360	13,830,859	0.5

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

6.0 PERFORMANCE BY VOLUME OF VISITS

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

Range of Volume of Visits	Jun-06	Jun-05	% Change	Jan-Jun06	Jan-Jun05	%Change
1 - 19,999 (313)	325,088	317,658	2.3	938,954	913,539	2.8
20,000 - 49,999 (77)	298,482	294,729	1.3	1,017,231	987,472	3.0
50,000 + (113)	2,669,253	2,677,576	-0.3	11,945,175	11,929,848	0.1
SCOTLAND (503)	3,292,823	3,289,963	0.1	13,901,360	13,830,859	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 – June 2006/2005 and January-June 2006/2005

Admission	Jun-06	Jun-05	% Change	Jan-Jun06	Jan-Jun05	%Change
Free (218)	2,128,836	2,111,890	0.8	9,898,935	9,903,733	0.0
Paid (285)	1,163,987	1,178,073	-1.2	4,002,425	3,927,126	1.9
SCOTLAND (503)	3,292,823	3,289,963	0.1	13,901,360	13,830,859	0.5

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 – June 2006/2005 and January-June 2006/2005

LEC	Jun-06	Jun-05	% Change	Jan-Jun06	Jan-Jun05	%Change
Argyll & The Islands (27)	81,562	89,431	-8.8	230,277	245,691	-6.3
Ayrshire (11)	65,307	64,219	1.7	191,060	189,591	0.8
Borders (32)	55,988	56,259	-0.5	197,994	206,418	-4.1
Caithness & Sutherland (16)	29,752	28,033	6.1	62,932	59,856	5.1
Dumfries & Galloway (36)	83,558	79,394	5.2	280,451	277,106	1.2
Dunbartonshire (9)	115,474	106,571	8.4	444,265	431,111	3.1
Edinburgh & Lothian (58)	576,702	577,731	-0.2	2,779,288	2,725,413	2.0
Fife (28)	80,660	79,181	1.9	291,322	288,996	0.8
Forth Valley (26)	210,437	194,519	8.2	785,242	684,549	14.7
Glasgow (29)	278,544	307,480	-9.4	1,600,884	1,547,257	3.5
Grampian (48)	175,197	169,301	3.5	632,201	659,425	-4.1
Inverness, Nairn, Badenoch & Strathspey (18)	131,590	126,619	3.9	431,340	409,168	5.4
Lanarkshire (18)	856,508	849,995	0.8	3,978,311	4,196,290	-5.2
Lochaber (10)	33,650	32,842	2.5	117,629	108,525	8.4
Moray (14)	50,744	52,714	-3.7	216,817	220,564	-1.7
Orkney (18)	58,187	63,823	-8.8	122,810	123,249	-0.4
Renfrewshire (12)	65,735	71,216	-7.7	301,031	319,510	-5.8
Ross & Cromarty (12)	27,889	28,215	-1.2	61,271	63,739	-3.9
Shetland (18)	15,140	16,764	-9.7	25,660	26,813	-4.3
Skye & Lochalsh (6)	13,411	11,946	12.3	36,042	32,479	11.0
Tayside (52)	276,081	271,554	1.7	1,084,583	984,577	10.2
Western Isles (5)	10,707	12,156	-11.9	29,950	30,532	-1.9
SCOTLAND (503)	3,292,823	3,289,963	0.1	13,901,360	13,830,859	0.5

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 the period January-June 2006.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Special event increased numbers	World Cup
Good weather	Fewer coach tours
Popular exhibition	High fuel prices
Start of Scottish school holidays	Refurbishment restricted access
	Lack of signage
	No access to car park