

2007 SCOTTISH VISITOR ATTRACTION BAROMETER May 2007 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 May 2007 with May 2006. Some 544 attraction operators provided figures for the month of May 2007 with 532 attractions providing comparable visits figures.

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

2.0 May 2007/2006 Summary

The total number of visits representing the 532 barometer attractions in Scotland for the month of May 2007 was **3,463,056**. When compared to data from the previous year of **3,317,082** this shows a visits increase of **4.4%**. The total number of visits for the responding 532 barometer attractions in Scotland for the period January-May 2007 was **12,541,887**. When compared to data from the previous year of **11,522,665** visits, this shows a visits increase of **8.8%**.

*The re-opening of Kelvingrove Museum and Art Gallery in July 2006 has had a significant influence in shaping performance for the first part of 2007. Figures have been adjusted in each table and an extra section added to show findings that exclude including Kelvingrove Museum and Art Gallery visits.

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

Attractions	May-07	May-06	% Change	Jan-May07	Jan-May06	%Change
532	3,463,056	3,317,082	4.4	12,541,887	11,522,665	8.8
531(ex-Kelvingrove)	3,214,748	3,317,082	-3.1	11,521,957	11,522,665	0.0

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

Attractions	Months	Visits	Months	Visits	%Change
532	Jan-07	1,625,290	Jan-06	1,556,542	4.4
	Feb-07	1,852,518	Feb-06	1,689,921	9.6
	Mar-07	2,112,898	Mar-06	1,720,083	22.8
	Apr-07	3,488,125	Apr-06	3,239,037	7.7
	May-07	3,463,056	May-06	3,317,082	4.4
* 531 (ex Kelvingrove)	May-07	3,214,748	May-06	3,317,082	-3.1

The highest increase in visits recorded by VisitScotland Region in May 2007 was experienced in Outer Hebrides (27.7%) followed by Greater Glasgow (10.7%) and Ayrshire & Arran (5.0%). Kingdom of Fife experienced the greatest decline in visits over the same period with decreases of -9.8% followed by Angus & City of Dundee (-7.2%). Worth noting also is the 1.5% increase experienced by Edinburgh which positively impacts on the overall percentage rise for May 2007.

During this period the highest increase in visits was recorded by the Museum/ Art Gallery category (30.0%) followed by Distillery sites (14.4%) and Industrial/ Craft Premises sites (7.6%). Garden sites experienced a decline in visits of -10.3%, followed by the Church/ Abbey/ Cathedral category with a decline of -9.4% when comparing May 2007 and May 2006.

Attractions in Urban and Seaside locations experienced increases in visits of 13.5% and 8.3% respectively; whilst visits to attractions in Rural locations experienced decreases of -5.5%. Attractions welcoming over 50,000 visits experienced the greatest increase in visits of 4.7%, with those attracting between 20,000 and 49,999 and between 1 and 19,999 visits experienced increases of 3.9% and 1.7% respectively.

Free admission attractions experienced an increase in visits of 7.1%, whilst Paid admission attractions saw a slight decrease in visits of -0.8%. The highest increases in visits by LEC area were experienced by attractions in Glasgow (69.2%) and Western Isles (27.7%). Lochaber experienced the greatest decrease in visits of -23.1% followed by Fife and Lanarkshire who experienced decreases of -9.8% and -7.9% respectively when comparing May 2007 with May 2006.

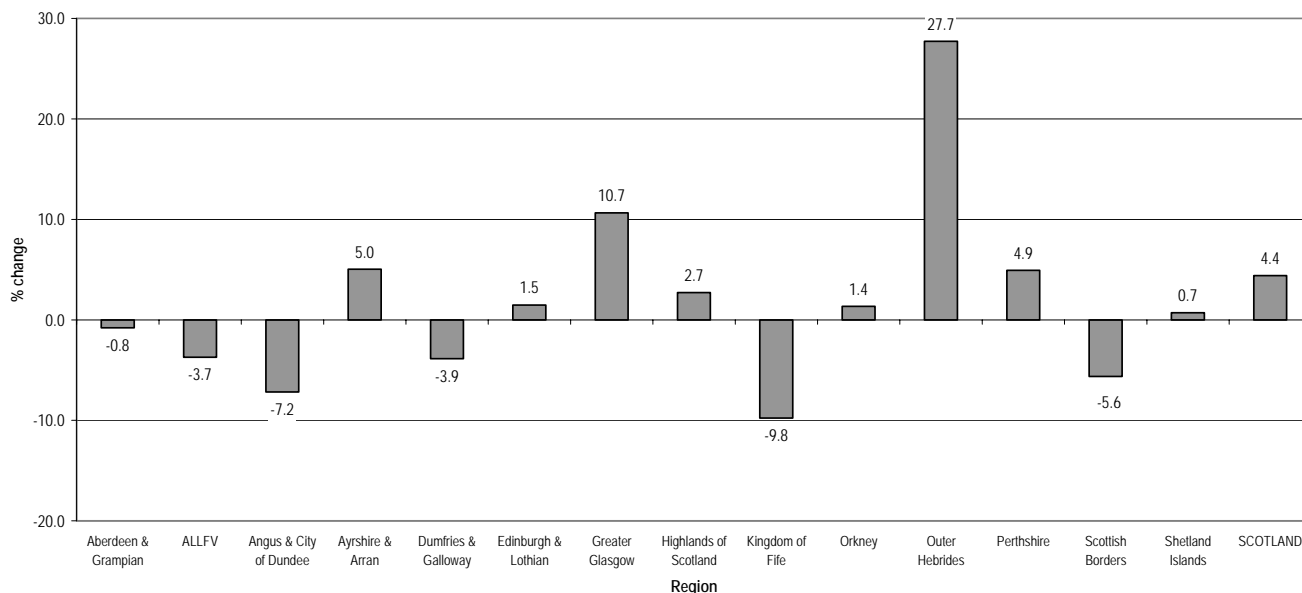
3.0 PERFORMANCE BY VISITSCOTLAND REGION

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

Region	May-07	May-06	% Change	Jan-May07	Jan-May06	%Change
Aberdeen & Grampian (67)	206,867	208,499	-0.8	673,934	669,439	0.7
ALLST (60)	236,364	245,469	-3.7	687,601	700,902	-1.9
Angus & City of Dundee (27)	114,982	123,879	-7.2	470,980	453,098	3.9
Ayrshire & Arran (16)	83,065	79,077	5.0	277,844	250,803	10.8
Dumfries & Galloway (40)	66,765	69,453	-3.9	205,773	203,627	1.1
Edinburgh & Lothian (56)	627,838	618,665	1.5	2,542,176	2,538,529	0.1
Greater Glasgow (63)	1,570,194	1,418,899	10.7	6,231,500	5,237,935	19.0
Highlands of Scotland (73)	273,837	266,603	2.7	694,480	682,369	1.8
Kingdom of Fife (28)	59,250	65,660	-9.8	200,403	217,485	-7.9
Orkney (20)	39,883	39,349	1.4	68,924	70,187	-1.8
Outer Hebrides (7)	12,230	9,576	27.7	23,311	19,814	17.6
Perthshire (21)	89,646	85,437	4.9	217,936	215,492	1.1
Scottish Borders (37)	74,386	78,822	-5.6	237,580	253,675	-6.3
Shetland Islands (17)	7,749	7,694	0.7	9,445	9,310	1.5
SCOTLAND (532)	3,463,056	3,317,082	4.4	12,541,887	11,522,665	8.8
*Greater Glasgow(62) (ex K'grove)	1,321,886	1,418,899	-6.8	5,211,570	5,237,935	-0.5

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

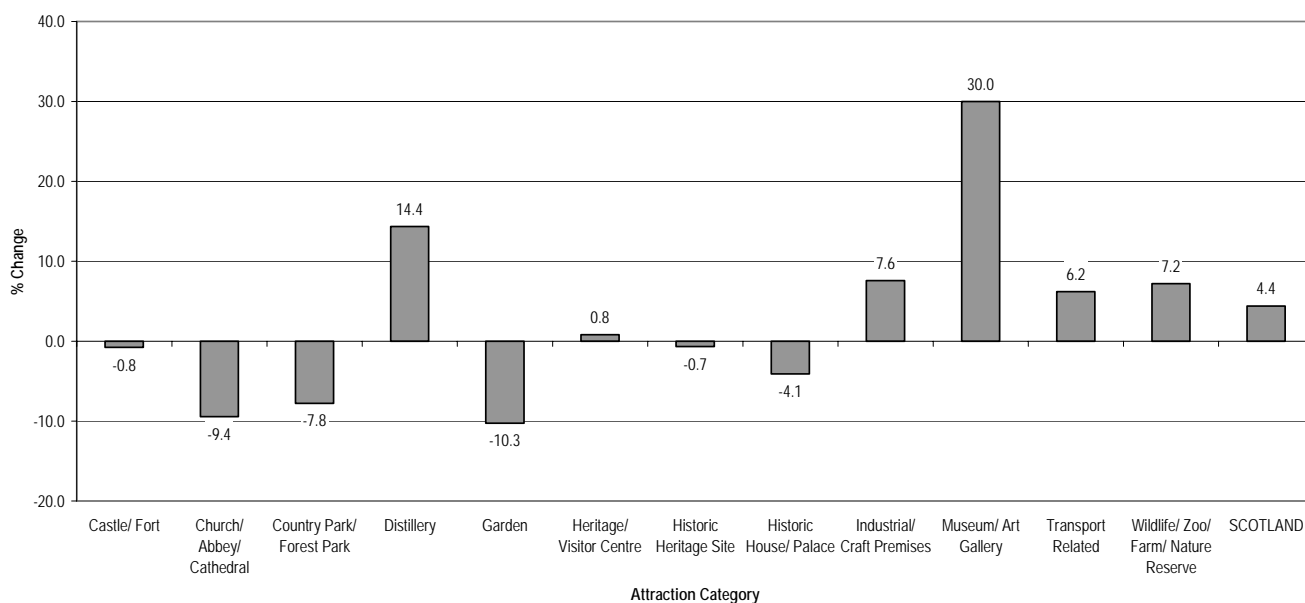
Performance by VisitScotland Region May 2007/2006


4.0 PERFORMANCE BY ATTRACTION CATEGORY

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

Category	May-07	May-06	% Change	Jan-May07	Jan-May06	%Change
Castle/ Fort (59)	359,321	362,113	-0.8	1,021,184	1,003,733	1.7
Church/ Abbey/ Cathedral (18)	103,255	114,006	-9.4	303,622	293,733	3.4
Country Park / Forest Park (14)	1,016,297	1,101,974	-7.8	3,970,018	3,927,294	1.1
Distillery (25)	66,210	57,897	14.4	140,724	137,941	2.0
Garden (28)	93,223	103,888	-10.3	298,699	280,446	6.5
Heritage/ Visitor Centre (93)	431,703	428,192	0.8	1,346,596	1,321,754	1.9
Historic Heritage Site (39)	69,763	70,234	-0.7	172,341	170,847	0.9
Historic House/ Palace (40)	82,732	86,262	-4.1	197,595	190,040	4.0
Industrial/ Craft Premises (10)	11,875	11,037	7.6	35,831	29,571	21.2
Museum/ Art Gallery (175)	1,010,852	777,520	30.0	4,219,326	3,399,211	24.1
Transport Related (9)	87,223	82,134	6.2	298,032	314,454	-5.2
Wildlife / Zoo / Farm / Nature Reserve (22)	130,602	121,825	7.2	537,919	453,641	18.6
SCOTLAND (532)	3,463,056	3,317,082	4.4	12,541,887	11,522,665	8.8
*Museum/ Art Gallery (174) (ex Kelvingrove)	762,544	777,520	-1.9	3,199,396	3,399,211	-5.9

Performance by Attraction Category May 2007/2006



5.0 PERFORMANCE BY LOCATION

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

Location	May-07	May-06	% Change	Jan-May07	Jan-May06	%Change
Rural (242)	1,465,530	1,551,081	-5.5	4,879,005	4,841,021	0.8
Seaside (66)	144,139	133,095	8.3	357,362	353,936	1.0
Urban (224)	1,853,387	1,632,906	13.5	7,305,520	6,327,708	15.5
SCOTLAND (532)	3,463,056	3,317,082	4.4	12,541,887	11,522,665	8.8
*Urban (223) (ex Kelvingrove)	1,605,079	1,632,906	-1.7	6,285,590	6,327,708	-0.7

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

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – May 2007/2006 and January-May 2007/2006

Range of Volume of Visits	May-07	May-06	% Change	Jan-May07	Jan-May06	%Change
1 - 19,999 (326)	258,295	254,092	1.7	603,261	581,688	3.7
20,000 - 49,999 (90)	291,224	280,216	3.9	805,532	836,166	-3.7
50,000 + (116)	2,913,537	2,782,774	4.7	11,133,094	10,104,811	10.2
SCOTLAND (532)	3,463,056	3,317,082	4.4	12,541,887	11,522,665	8.8
*50,000 + (115) (ex Kelvingrove)	2,665,229	2,782,774	-4.2	10,113,164	10,104,811	0.1

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 – May 2007/2006 and January-May 2007/2006

Admission	May-07	May-06	% Change	Jan-May07	Jan-May06	%Change
Free (225)	2,345,877	2,190,652	7.1	9,065,986	8,086,149	12.1
Paid (307)	1,117,179	1,126,430	-0.8	3,475,901	3,436,516	1.1
SCOTLAND (532)	3,463,056	3,317,082	4.4	12,541,887	11,522,665	8.8
*Free (224) (ex Kelvingrove)	2,097,569	2,190,652	-4.2	8,046,056	8,086,149	-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 – May 2007/2006 and January-May 2007/2006

LEC	May-07	May-06	% Change	Jan-May07	Jan-May06	%Change
Argyll & The Islands (29)	80,790	73,423	10.0	164,560	162,868	1.0
Ayrshire (15)	79,510	75,360	5.5	270,862	244,576	10.7
Borders (37)	74,386	78,822	-5.6	237,580	253,675	-6.3
Caithness & Sutherland (17)	18,408	18,832	-2.3	29,217	32,609	-10.4
Dumfries & Galloway (40)	66,765	69,453	-3.9	205,773	203,627	1.1
Dunbartonshire (7)	46,933	43,801	7.2	129,924	108,558	19.7
Edinburgh & Lothian (56)	627,838	618,665	1.5	2,542,176	2,538,529	0.1
Fife (28)	59,250	65,660	-9.8	200,403	217,485	-7.9
Forth Valley (26)	167,732	176,465	-4.9	554,754	562,475	-1.4
Glasgow (31)	543,037	320,854	69.2	2,303,234	1,368,537	68.3
Grampian (51)	146,461	143,371	2.2	484,989	479,814	1.1
Inverness & East Highland (28)	138,159	126,805	9.0	389,332	368,219	5.7
Lanarkshire (19)	910,488	988,999	-7.9	3,518,498	3,486,026	0.9
Lochaber (10)	27,406	35,659	-23.1	75,090	83,756	-10.3
Moray (18)	65,726	68,517	-4.1	195,814	194,262	0.8
Orkney (20)	39,883	39,349	1.4	68,924	70,187	-1.8
Renfrewshire (12)	61,780	63,207	-2.3	252,415	253,493	-0.4
Shetland (17)	7,749	7,694	0.7	9,445	9,310	1.5
Skye & Wester Ross (15)	78,506	77,487	1.3	183,299	184,133	-0.5
Tayside (49)	210,019	215,083	-2.4	702,287	680,712	3.2
Western Isles (7)	12,230	9,576	27.7	23,311	19,814	17.6
SCOTLAND (532)	3,463,056	3,317,082	4.4	12,541,887	11,522,665	8.8
*Glasgow (30 (ex Kelvingrove)	294,729	320,854	-8.1	1,283,304	1,368,537	-6.2

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 May 2007.

Reasons for positive impacts on visitor figures:-

Good weather
Increase in school visits
Removal of admission charges
Popular exhibitions
Increase in coach visits

Reasons for negative impacts in visitor figures:-

Cooler weather
Lack of funding
Admission charges
Staffing Issues

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