

## 2006 SCOTTISH VISITOR ATTRACTION BAROMETER May 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](mailto:mma4@gcal.ac.uk)).

This Barometer compares the period of May 2006 with May 2005. Some 524 attraction operators provided figures for the month of May 2006 with 505 attractions providing comparable visits figures.

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

### 2.0 MAY 2006/2005

#### Summary

The total number of visits representing the 505 barometer attractions in Scotland for the month of May 2006 was **2,755,854**. When compared to data from the previous year of **2,956,675** this shows a visits decrease of **-6.8%**. The total number of visits for the responding 505 barometer attractions in Scotland for the period January-May 2006 was **10,394,337**. When compared to data from the previous year of **10,475,968** visits, this shows a visits decrease of **-0.8%**.

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

Attractions	May-06	May-05	% Change	Jan-May06	Jan-May05	%Change
505	2,755,854	2,956,675	-6.8	10,394,337	10,475,968	-0.8

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

Attractions	Months	Visits	Months	Visits	%Change
505	Jan-06	1,488,606	Jan-05	1,267,012	17.5
	Feb-06	1,586,111	Feb-05	1,528,898	3.7
	Mar-06	1,605,286	Mar-05	2,096,578	-23.4
	Apr-06	2,958,480	Apr-05	2,626,805	12.6
	May-06	2,755,854	May-05	2,956,675	-6.8

The highest increase in visits recorded by VisitScotland Region in May 2006 was experienced in Angus & City of Dundee (20.9%) and Shetland Islands (17.5%). Greater Glasgow experienced the greatest decline in visits over the same period with decreases of -16.9%. Ayrshire & Arran and Aberdeen & Grampian also experienced decreases in visits figures of -9.7% and -9.0% respectively.

During this period the highest increase in visits was recorded by Church/ Abbey/ Cathedral category (15.3%) followed by Historic Heritage Sites (9.8%). The Country Park/ Forest Park category experienced a decline in visits of -15.0%, followed by the Garden category with a decline of -12.5%, with Transport Related and Wildlife/ Zoo/ Farm/ Nature Reserve attractions experiencing declines of -11.6% and -11.3%, respectively, comparing May 2006 and May 2005.

Attractions in Seaside locations saw an increase in visits of 9.1%, whilst visits to attractions in Rural and Urban locations experienced decreases in visits of -7.8% and -7.1% respectively. Attractions welcoming between 20,000 and 49,999 experienced the greatest increase in visits of 1.1%, with those attracting between 1 and 19,999 visits experiencing an increase of 0.6%. Those attracting over 50,000 visits saw a decrease in visits of -8.4% when comparing May 2006 with May 2005.

Free and Paid admission attractions experienced a decrease in visits of -8.6% and -3.4% respectively.

The highest increases in visits by LEC area were experienced by attractions in Shetland (17.5%), Lochaber (15.2%) and Tayside (10.3%), whereas Lanarkshire and Renfrewshire experienced decreases in visits of -23.4% and -16.2% respectively.

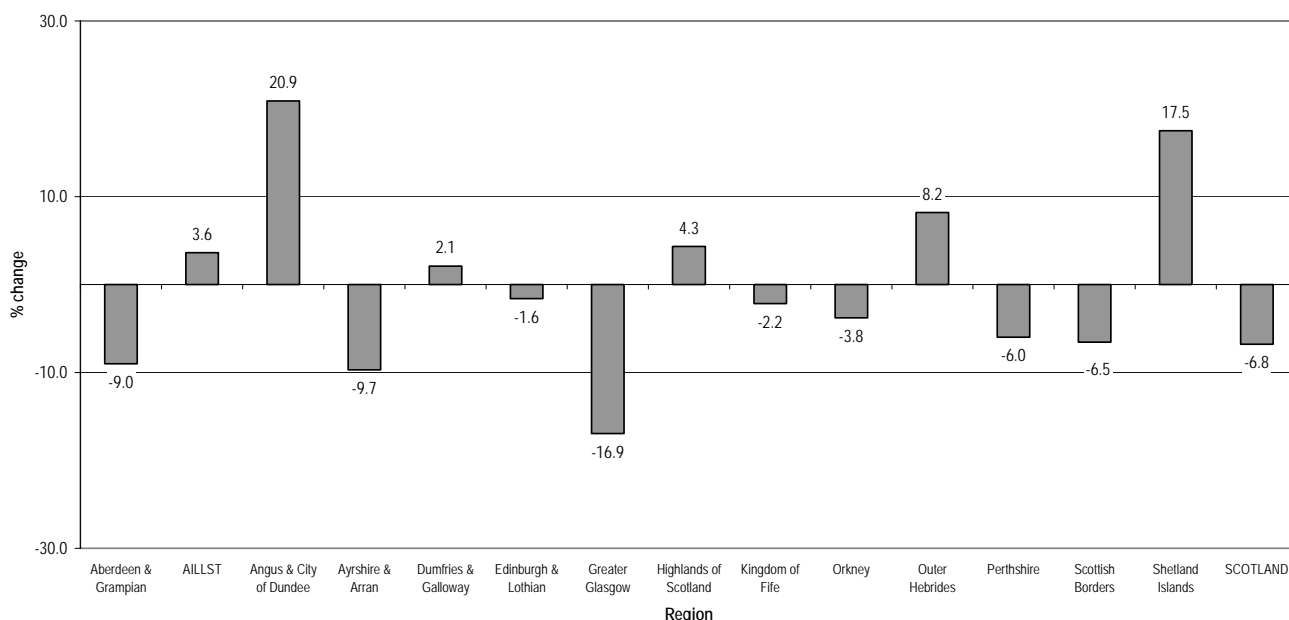
### 3.0 PERFORMANCE BY REGION

#### Performance by Region – May 2006/2005 and January-May 2006/2005

Region	May-06	May-05	% Change	Jan-May06	Jan-May05	%Change
Aberdeen & Grampian (58)	194,508	213,768	-9.0	605,113	643,428	-6.0
ALLST (57)	253,333	244,481	3.6	749,088	723,611	3.5
Angus & City of Dundee (28)	165,798	137,128	20.9	512,956	455,112	12.7
Ayrshire & Arran (12)	75,129	83,206	-9.7	236,099	215,971	9.3
Dumfries & Galloway (37)	74,277	72,756	2.1	197,960	198,722	-0.4
Edinburgh & Lothian (58)	508,693	516,936	-1.6	2,203,203	2,112,287	4.3
Greater Glasgow (59)	1,000,176	1,204,188	-16.9	4,716,966	4,980,337	-5.3
Highlands of Scotland (71)	229,364	219,809	4.3	534,975	509,307	5.0
Kingdom of Fife (29)	63,229	64,633	-2.2	210,662	209,815	0.4
Orkney (18)	36,147	37,568	-3.8	64,623	59,426	8.7
Outer Hebrides (8)	9,661	8,929	8.2	19,976	19,057	4.8
Perthshire (21)	85,325	90,749	-6.0	187,562	186,635	0.5
Scottish Borders (31)	51,498	55,107	-6.5	144,634	152,211	-5.0
Shetland Islands (18)	8,716	7,417	17.5	10,520	10,049	4.7
<b>SCOTLAND (505)</b>	<b>2,755,854</b>	<b>2,956,675</b>	<b>-6.8</b>	<b>10,394,337</b>	<b>10,475,968</b>	<b>-0.8</b>

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

Performance by Region May 2006/2005



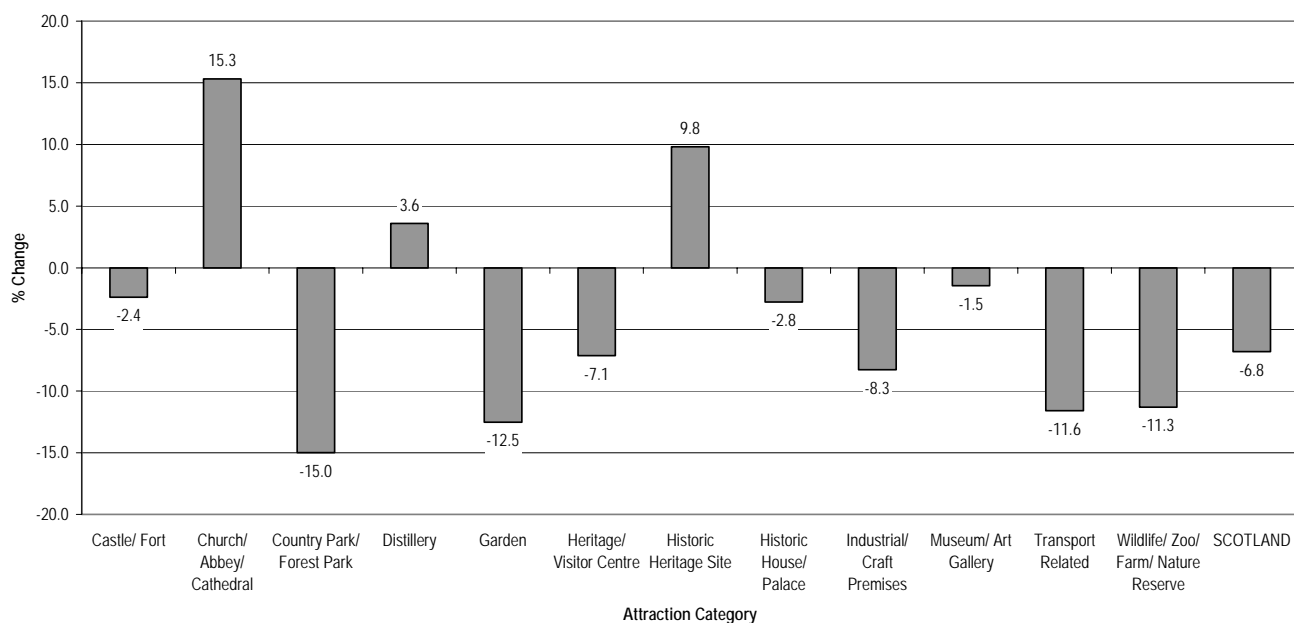
### 4.0 PERFORMANCE BY ATTRACTION CATEGORY

#### Performance by Attraction Category – May 2006/2005 and January-May 2006/2005

Category	May-06	May-05	% Change	Jan-May06	Jan-May05	%Change
Castle/ Fort (64)	363,201	372,054	-2.4	1,022,628	953,251	7.3
Church/ Abbey/ Cathedral (14)	63,069	54,695	15.3	166,189	139,133	19.4
Country Park / Forest Park (11)	761,021	895,123	-15.0	3,511,281	3,690,158	-4.8
Distillery (23)	49,385	47,674	3.6	105,005	108,558	-3.3
Garden (29)	105,419	120,505	-12.5	285,814	320,426	-10.8
Heritage/ Visitor Centre (84)	351,488	378,439	-7.1	1,078,397	1,163,929	-7.3
Historic Heritage Site (39)	77,027	70,148	9.8	182,569	160,783	13.5
Historic House/ Palace (42)	99,100	101,926	-2.8	253,040	251,198	0.7
Industrial/ Craft Premises (11)	18,618	20,294	-8.3	61,700	61,333	0.6
Museum/ Art Gallery (161)	732,526	743,314	-1.5	3,287,501	3,187,280	3.1
Transport Related (8)	81,428	92,101	-11.6	264,730	263,818	0.3
Wildlife / Zoo / Farm / Nature Reserve (19)	53,572	60,402	-11.3	175,483	176,101	-0.4
<b>SCOTLAND (505)</b>	<b>2,755,854</b>	<b>2,956,675</b>	<b>-6.8</b>	<b>10,394,337</b>	<b>10,475,968</b>	<b>-0.8</b>

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

Performance by Attraction Category May 2006/2005



## 5.0 PERFORMANCE BY LOCATION

### Performance by Location – May 2006/2005 and January-May 2006/2005

Location	May-06	May-05	% Change	Jan-May06	Jan-May05	%Change
Rural (229)	1,240,819	1,345,313	-7.8	4,417,682	4,477,662	-1.3
Seaside (61)	121,589	111,397	9.1	277,637	251,935	10.2
Urban (215)	1,393,446	1,499,965	-7.1	5,699,018	5,746,371	-0.8
<b>Scotland (505)</b>	<b>2,755,854</b>	<b>2,956,675</b>	<b>-6.8</b>	<b>10,394,337</b>	<b>10,475,968</b>	<b>-0.8</b>

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 2006/2005 and January-May 2006/2005

Range of Volume of Visits	May-06	May-05	% Change	Jan-May06	Jan-May05	%Change
1 - 19,999 (316)	260,819	259,188	0.6	598,700	587,625	1.9
20,000 - 49,999 (76)	247,850	245,223	1.1	707,673	676,179	4.7
50,000 + (113)	2,247,185	2,452,264	-8.4	9,087,964	9,212,164	-1.3
<b>SCOTLAND (505)</b>	<b>2,755,854</b>	<b>2,956,675</b>	<b>-6.8</b>	<b>10,394,337</b>	<b>10,475,968</b>	<b>-0.8</b>

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 2006/2005 and January-May 2006/2005

Admission	May-06	May-05	% Change	Jan-May06	Jan-May05	%Change
Free (220)	1,766,711	1,933,000	-8.6	7,491,999	7,691,178	-2.6
Paid (285)	989,143	1,023,675	-3.4	2,902,338	2,784,790	4.2
<b>SCOTLAND (505)</b>	<b>2,755,854</b>	<b>2,956,675</b>	<b>-6.8</b>	<b>10,394,337</b>	<b>10,475,968</b>	<b>-0.8</b>

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 2006/2005 and January-May 2006/2005

LEC	May-06	May-05	% Change	Jan-May06	Jan-May05	%Change
Argyll & The Islands (26)	73,003	71,067	2.7	147,853	154,470	-4.3
Ayrshire (11)	71,412	78,785	-9.4	229,872	208,767	10.1
Borders (31)	51,498	55,107	-6.5	144,634	152,211	-5.0
Caithness & Sutherland (18)	19,987	19,130	4.5	33,327	31,823	4.7
Dumfries & Galloway (37)	74,277	72,756	2.1	197,960	198,722	-0.4
Dunbartonshire (6)	23,073	24,494	-5.8	85,279	92,105	-7.4
Edinburgh & Lothian (57)	506,258	515,861	-1.9	2,192,708	2,107,734	4.0
Fife (29)	63,229	64,633	-2.2	210,662	209,815	0.4
Forth Valley (28)	162,821	156,426	4.1	534,238	496,406	7.6
Glasgow (29)	306,012	304,473	0.5	1,334,907	1,252,275	6.6
Grampian (43)	137,840	152,244	-9.5	431,678	465,042	-7.2
Inverness, Nairn, Badenoch & Strathspey (19)	105,941	103,658	2.2	296,846	282,019	5.3
Lanarkshire (17)	636,900	830,935	-23.4	3,142,002	3,474,545	-9.6
Lochaber (11)	35,918	31,169	15.2	83,979	77,197	8.8
Moray (18)	62,034	65,196	-4.8	180,204	184,551	-2.4
Orkney (18)	36,147	37,568	-3.8	64,623	59,426	8.7
Renfrewshire (12)	56,516	67,473	-16.2	235,296	248,294	-5.2
Ross & Cromarty (12)	21,769	23,277	-6.5	33,382	35,524	-6.0
Shetland (18)	8,716	7,417	17.5	10,520	10,049	4.7
Skye & Lochalsh (7)	35,944	33,121	8.5	71,749	64,917	10.5
Tayside (50)	256,898	232,956	10.3	712,642	651,019	9.5
Western Isles (8)	9,661	8,929	8.2	19,976	19,057	4.8
<b>SCOTLAND (505)</b>	<b>2,755,854</b>	<b>2,956,675</b>	<b>-6.8</b>	<b>10,394,337</b>	<b>10,475,968</b>	<b>-0.8</b>

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-May 2006.

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

Special event increased numbers  
Good weather  
Popular exhibition

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

Decline in coach traffic  
Poor weather for most of month  
Road works restricting access  
High fuel prices  
Avian flu scare  
Refurbishment restricted access