

**2007 SCOTTISH VISITOR ATTRACTION BAROMETER  
September 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 September 2007 with September 2006. Some 528 attraction operators provided figures for the month of September 2007 with 515 attractions providing comparable visits figures.

**2.0 September 2007/2006**
**Summary**

The total number of visits representing the 515 barometer attractions in Scotland for the month of September 2007 was **3,154,106**. When compared to data from the previous year of **3,292,438** this shows a visits decrease of **-4.2%**. The total number of visits for the responding 515 barometer attractions in Scotland for the period January-September 2007 was **28,369,901**. When compared to data from the previous year of **27,611,443** visits, this shows a visits increase of **2.2%**.

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

Attractions	Sep-07	Sep-06	% Change	Jan-Sep07	Jan-Sep06	%Change
515	3,154,106	3,292,438	-4.2	28,369,901	27,611,443	2.2
*514 (ex-Kelvingrove)	3,010,308	2,955,460	1.9	26,520,342	26,642,992	-0.3

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

Attractions	Months	Visits	Months	Visits	%Change
515	Jan-07	1,611,325	Jan-06	1,529,273	5.4
	Feb-07	1,832,033	Feb-06	1,656,632	10.6
	Mar-07	2,088,916	Mar-06	1,690,551	23.6
	Apr-07	3,379,279	Apr-06	3,132,059	7.9
	May-07	3,366,232	May-06	3,216,524	4.7
	June-07	3,400,252	June-06	3,327,114	2.2
	July-07	4,679,518	July-06	4,909,477	-4.7
	Aug-07	4,858,240	Aug-06	4,995,707	-2.8
	Sep-07	3,154,106	Sep-06	3,292,438	-4.2
*514 (ex-Kelvingrove)	Sep-07	3,010,308	Sep-06	2,955,460	1.9

The highest increase in visits recorded by VisitScotland Region in September 2007 was experienced in Shetland (93.4%) followed by Orkney (22.5%) and Perthshire (13.4%). Greater Glasgow experienced the greatest decline in visits over the same period with decreases of -9.8%, followed by Aberdeen & Grampian (-5.8%) and Edinburgh & Lothians (-4.9%).

During this period the highest increase in visits was recorded by the Church/ Abbey/ Cathedral category (9.2%) followed by the Transport Related category (8.2%) and the Country Park/ Forest Park category (7.1%). Museum/ Art Gallery sites experienced a decline in visits of -18.9%, followed by Distillery sites with a decline of -8.9% when comparing September 2007 with September 2006.

Attractions in Rural locations experienced an increase in visits of 3.8%; whilst visits to attractions in Urban and Seaside locations experienced decreases of -9.1% and -0.2% respectively. Attractions welcoming between 1 and 19,999 visits experienced an increase in visits of 7.2%, with those attracting 50,000 and over and between 20,000 and 49,999 visits experienced decreases of -5.6% and -0.8% respectively.

Paid admission attractions experienced an increase in visits of 1.5%, whilst free admission attractions experienced a decrease of -7.1%. The greatest increases in visits by LEC area were experienced by attractions in Shetland (93.4%) and Orkney (22.5%). Glasgow experienced the greatest decrease in visits of -28.3% followed by Dunbartonshire who experienced decreases of -17.5% when comparing September 2007 with September 2006.

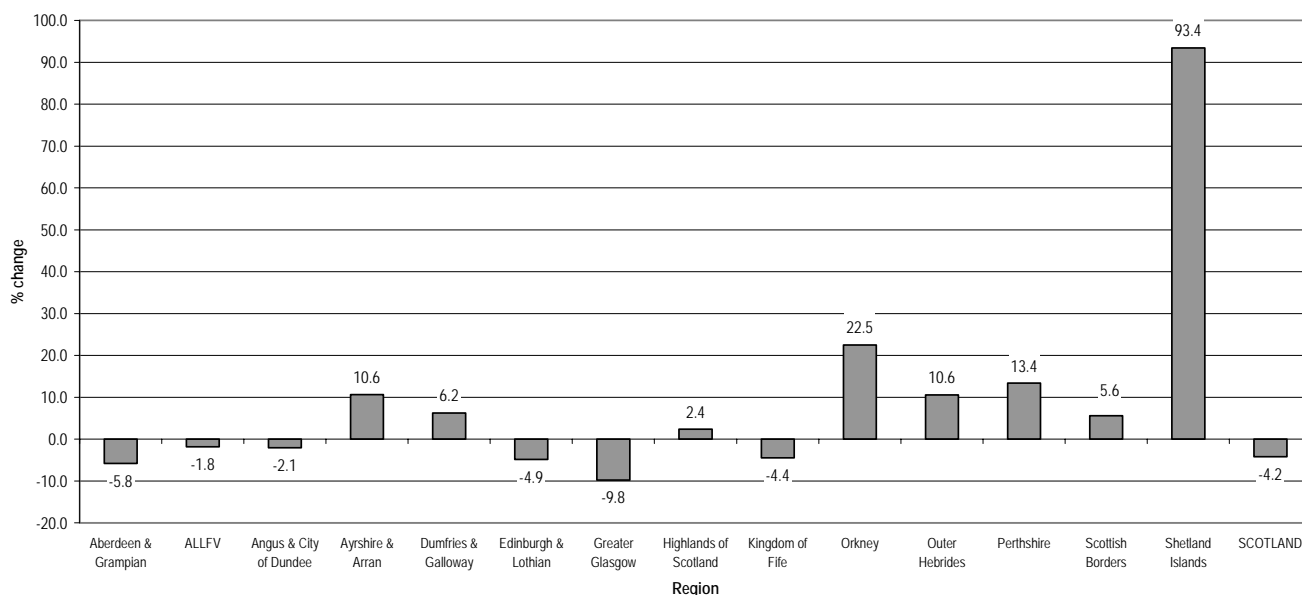
**3.0 PERFORMANCE BY VISITSCOTLAND REGION**

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

Region	Sep-07	Sep-06	% Change	Jan-Sep07	Jan-Sep06	%Change
Aberdeen & Grampian (61)	161,657	171,677	-5.8	1,465,546	1,546,964	-5.3
ALLFV (59)	269,159	274,174	-1.8	2,103,119	2,183,808	-3.7
Angus & City of Dundee (28)	91,048	92,977	-2.1	861,245	846,156	1.8
Ayrshire & Arran (16)	75,845	68,567	10.6	737,918	683,716	7.9
Dumfries & Galloway (37)	62,124	58,473	6.2	499,175	509,206	-2.0
Edinburgh & Lothians (57)	711,342	747,683	-4.9	6,123,615	6,242,426	-1.9
Greater Glasgow (65)	1,224,030	1,356,590	-9.8	12,438,056	11,730,846	6.0
Highlands of Scotland (69)	245,026	239,323	2.4	1,845,673	1,808,701	2.0
Kingdom of Fife (29)	62,575	65,480	-4.4	524,141	538,431	-2.7
Orkney (19)	53,605	43,765	22.5	403,554	351,270	14.9
Outer Hebrides (6)	8,685	7,856	10.6	76,024	70,450	7.9
Perthshire (21)	123,347	108,807	13.4	791,540	757,697	4.5
Scottish Borders (33)	53,751	50,908	5.6	412,796	427,391	-3.4
Shetland Islands (15)	11,912	6,158	93.4	87,499	52,713	66.0
<b>SCOTLAND (515)</b>	<b>3,154,106</b>	<b>3,292,438</b>	<b>-4.2</b>	<b>28,369,901</b>	<b>27,611,443</b>	<b>2.2</b>
Greater Glasgow (64)(ex-K'grove)	1,080,232	1,019,612	5.9	10,588,497	10,569,215	0.2

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

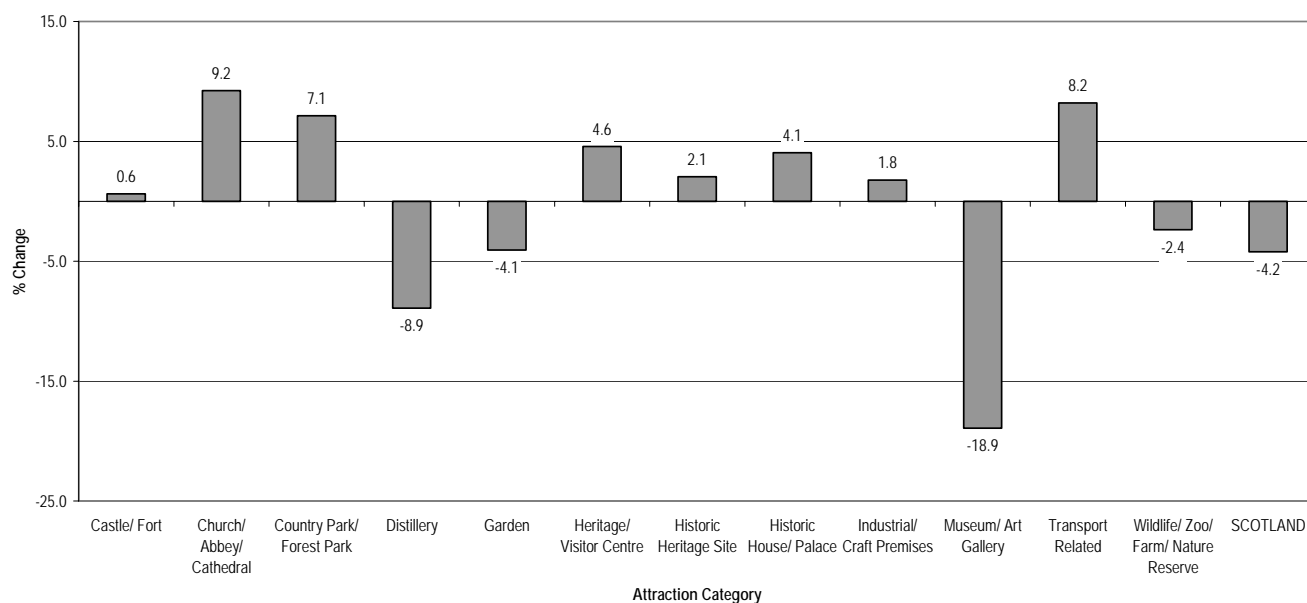
Performance by VisitScotland Region September 2007/2006


**4.0 PERFORMANCE BY ATTRACTION CATEGORY**

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

Category	Sep-07	Sep-06	% Change	Jan-Sep07	Jan-Sep06	%Change
Castle/ Fort (55)	339,463	337,340	0.6	2,889,544	2,909,783	-0.7
Church/ Abbey/ Cathedral (18)	138,402	126,693	9.2	988,201	906,855	9.0
Country Park / Forest Park (10)	717,206	669,356	7.1	7,330,000	7,335,456	-0.1
Distillery (23)	65,149	71,518	-8.9	425,468	447,099	-4.8
Garden (28)	80,967	84,393	-4.1	741,091	755,032	-1.8
Heritage/ Visitor Centre (89)	450,865	431,116	4.6	3,515,614	3,421,645	2.7
Historic Heritage Site (38)	81,924	80,268	2.1	634,510	638,088	-0.6
Historic House/ Palace (39)	84,243	80,958	4.1	665,938	639,921	4.1
Industrial/ Craft Premises (8)	9,364	9,201	1.8	71,246	69,101	3.1
Museum/ Art Gallery (177)	956,342	1,179,514	-18.9	9,146,594	8,646,542	5.8
Transport Related (10)	136,650	126,289	8.2	817,950	852,558	-4.1
Wildlife/ Zoo/ Farm/ Nature Reserve (20)	93,531	95,792	-2.4	1,143,745	1,127,695	1.4
<b>SCOTLAND (515)</b>	<b>3,154,106</b>	<b>3,292,438</b>	<b>-4.2</b>	<b>28,369,901</b>	<b>27,749,775</b>	<b>2.2</b>
*Museum/ Art Gallery (176)(ex-Kelvingrove)	812,544	842,536	-3.6	7,297,035	7,484,911	-2.5

Performance by Attraction Category September 2007/2006



## 5.0 PERFORMANCE BY LOCATION

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

Location	Sep-07	Sep-06	% Change	Jan-Sep07	Jan-Sep06	%Change
Rural (234)	1,209,164	1,164,562	3.8	10,828,632	10,902,603	-0.7
Seaside (57)	116,800	116,994	-0.2	942,646	924,282	2.0
Urban (224)	1,828,142	2,010,882	-9.1	16,598,623	15,922,890	4.2
<b>SCOTLAND (515)</b>	<b>3,154,106</b>	<b>3,292,438</b>	<b>-4.2</b>	<b>28,369,901</b>	<b>27,749,775</b>	<b>2.2</b>
*Urban (223)(ex-Kelvingrove)	1,684,344	1,673,904	0.6	14,749,064	14,761,259	-0.1

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

## 6.0 PERFORMANCE BY VOLUME OF VISITS

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

Range of Volume of Visits	Sep-07	Sep-06	% Change	Jan-Sep07	Jan-Sep06	%Change
1 - 19,999 (314)	267,699	249,651	7.2	1,999,708	1,946,835	2.7
20,000 - 49,999 (85)	289,426	291,883	-0.8	2,286,013	2,340,254	-2.3
50,000 + (116)	2,596,981	2,750,904	-5.6	24,084,180	23,462,686	2.6
<b>SCOTLAND (515)</b>	<b>3,154,106</b>	<b>3,292,438</b>	<b>-4.2</b>	<b>28,369,901</b>	<b>27,749,775</b>	<b>2.2</b>
*50,000 + (115)(ex-Kelvingrove)	2,453,183	2,413,926	1.6	22,234,621	22,301,055	-0.3

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 – September 2007/2006 and January-September 2007/2006

Admission	Sep-07	Sep-06	% Change	Jan-Sep07	Jan-Sep06	%Change
Free (224)	2,023,845	2,179,110	-7.1	18,819,995	18,106,199	3.9
Paid (308)	1,130,261	1,113,328	1.5	9,549,906	9,643,576	-1.0
<b>SCOTLAND (532)</b>	<b>3,154,106</b>	<b>3,292,438</b>	<b>-4.2</b>	<b>28,369,901</b>	<b>27,749,775</b>	<b>2.2</b>
Free (223) (ex-Kelvingrove)	1,880,047	1,842,132	2.1	16,970,436	16,944,568	0.2

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 – September 2007/2006 and January-September 2007/2006

LEC	Sep-07	Sep-06	% Change	Jan-Sep07	Jan-Sep06	%Change
Argyll & The Islands (26)	72,768	70,197	3.7	549,900	555,256	-1.0
Ayrshire (15)	71,238	64,314	10.8	705,493	652,933	8.0
Borders (33)	53,751	50,908	5.6	412,796	427,391	-3.4
Caithness & Sutherland (17)	24,974	24,940	0.1	173,702	170,995	1.6
Dumfries & Galloway (36)	61,559	58,052	6.0	496,739	506,631	-2.0
Dunbartonshire (7)	42,507	51,526	-17.5	353,865	361,112	-2.0
Edinburgh & Lothian (57)	711,342	747,683	-4.9	6,123,615	6,242,426	-1.9
Fife (29)	62,575	65,480	-4.4	524,141	538,431	-2.7
Forth Valley (28)	209,084	200,145	4.5	1,654,350	1,660,557	-0.4
Glasgow (32)	455,487	635,084	-28.3	4,683,788	4,017,274	16.6
Grampian (48)	118,370	134,685	-12.1	1,157,860	1,243,314	-6.9
Inverness & East Highland (27)	145,450	144,561	0.6	1,159,392	1,127,799	2.8
Lanarkshire (20)	664,155	621,918	6.8	6,777,025	6,805,452	-0.4
Lochaber (11)	41,828	35,377	18.2	273,823	268,521	2.0
Moray (15)	48,445	43,262	12.0	333,316	329,767	1.1
Orkney (19)	53,605	43,765	22.5	403,554	351,270	14.9
Renfrewshire (13)	52,833	55,241	-4.4	550,170	539,458	2.0
Shetland (15)	11,912	6,158	93.4	87,499	52,713	66.0
Skye & Wester Ross (11)	23,068	24,339	-5.2	176,651	181,075	-2.4
Tayside (50)	220,470	206,947	6.5	1,696,198	1,646,950	3.0
Western Isles (6)	8,685	7,856	10.6	76,024	70,450	7.9
<b>SCOTLAND (515)</b>	<b>3,154,106</b>	<b>3,292,438</b>	<b>-4.2</b>	<b>28,369,901</b>	<b>27,749,775</b>	<b>2.2</b>
*Glasgow (31)(ex-Kelvingrove)	311,689	298,106	4.6	2,834,229	2,855,643	-0.7

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 September 2007.

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

Television coverage  
Improved signage  
Increase in groups  
More European visitors

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

Bad weather  
Fewer US visitors  
Fewer UK visitors  
Access restrictions

\* 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