

2007 SCOTTISH VISITOR ATTRACTION BAROMETER August 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).

This Barometer compares the period of August 2007 with August 2006. Some 542 attraction operators provided figures for the month of August 2007 with 532 attractions providing comparable visits figures.

2.0 August 2007/2006

Summary

The total number of visits representing the 532 barometer attractions in Scotland for the month of August 2007 was 4,981,352. When compared to data from the previous year of 5,125,702 this shows a visits decrease of -2.8%. The total number of visits for the responding 532 barometer attractions in Scotland for the period January-August 2007 was 25,418,183. When compared to data from the previous year of 24,626,627 visits, this shows a visits increase of 3.2%.

The re-opening of Kelvingrove Museum and art Gallery in August 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 following table shows total visits recorded for August 2007/2006 and January-August 2007/2006 as well as the % change calculation.

Attractions	Aug-07	Aug-06	% Change	Jan-Aug07	Jan-Aug06	%Change
532	4,981,352	5,125,702	-2.8	25,418,183	24,626,627	3.2
*531 (ex-Kelvingrove)	4,758,289	4,715,325	0.9	23,712,422	23,801,974	-0.4

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

Attractions	Months	Visits	Months	Visits	%Change
532	Jan-07	1,574,063	Jan-06	1,497,478	5.1
	Feb-07	1,801,559	Feb-06	1,623,142	11.0
	Mar-07	2,043,744	Mar-06	1,641,226	24.5
	Apr-07	3,421,955	Apr-06	3,164,867	8.1
	May-07	3,392,963	May-06	3,226,433	5.2
	June-07	3,433,887	June-06	3,357,844	2.3
	July-07	4,768,660	July-06	4,989,935	-4.4
	Aug-07	4,981,352	Aug-06	5,125,702	-2.8
*531 (ex-Kelvingrove)	Aug-07	4,758,289	Aug-06	4,715,325	0.9

The highest increase in visits recorded by VisitScotland Region in August 2007 was experienced in Shetland (39.1%) followed by Orkney (28.3%) and Perthshire (12.5%). Kingdom of Fife experienced the greatest decline in visits over the same period with decreases of -9.8%, followed by Dumfries & Galloway (-8.1%) and Argyll, Loch Lomond and Forth Valley (-6.2%).

During this period the highest increase in visits was recorded by the Church/ Abbey/ Cathedral category (18.8%) followed by the Country Park/ Forest Park category (9.2%). Museum/ Art Gallery sites experienced a decline in visits of -13.1%, followed by Wildlife/ Zoo/ Farm/ Nature Reserve sites with a decline of -9.3% when comparing August 2007 with August 2006.

Attractions in Rural locations experienced an increase in visits of 2.9%; whilst visits to attractions in Urban and Seaside locations experienced decreases of -6.6% and -0.7% respectively. Attractions welcoming between 1 and 19,999 visits experienced an increase in visits of 0.7%, with those attracting 50,000 and over and between 20,000 and 49,999 visits experienced decreases of -3.5% and -0.8% respectively.

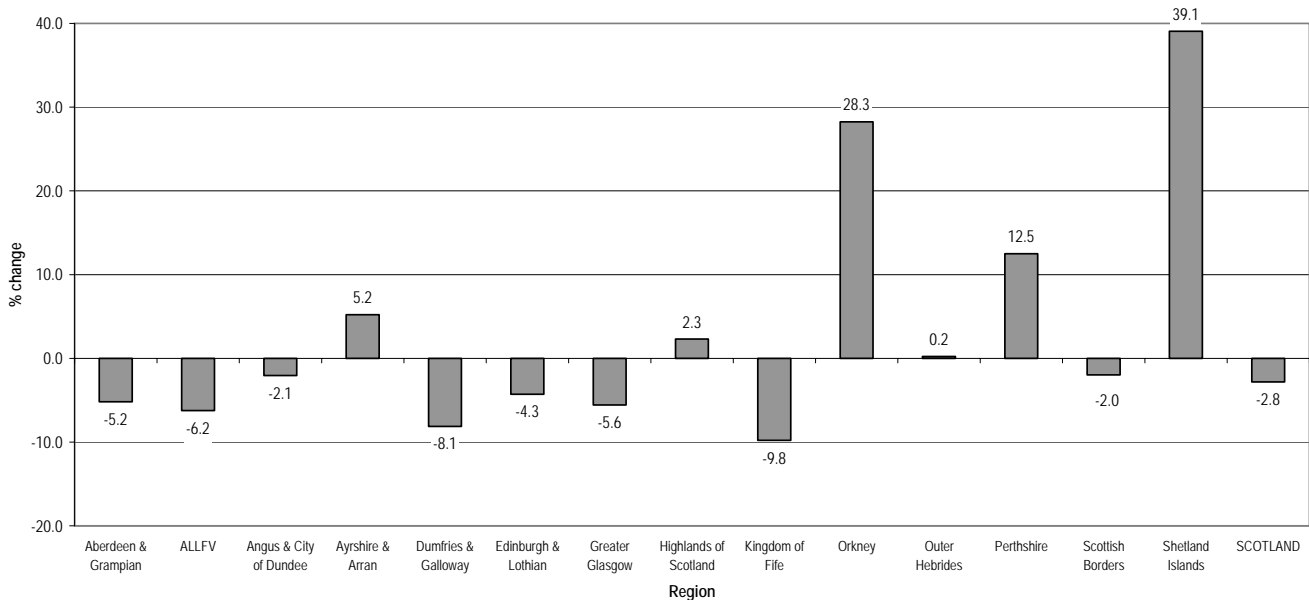
Both Free and Paid admission attractions experienced a decrease in visits of -2.8%. The highest increases in visits by LEC area were experienced by attractions in Shetland (39.1%); Renfrewshire (33.2%) and Orkney (28.3%). Glasgow experienced the greatest decrease in visits of -23.4% followed by Dunbartonshire and Fife who experienced decreases of -13.8% and -9.8% respectively when comparing August 2007 with August 2006.

3.0 PERFORMANCE BY VISITSCOTLAND REGION
Performance by VisitScotland Region – August 2007/2006 and January-August 2007/2006

Region	Aug-07	Aug-06	% Change	Jan-Aug07	Jan-Aug06	%Change
Aberdeen & Grampian (63)	257,659	271,760	-5.2	1,243,008	1,307,775	-5.0
ALLFV (61)	430,988	459,663	-6.2	1,850,810	1,929,063	-4.1
Angus & City of Dundee (26)	119,443	121,957	-2.1	611,098	574,143	6.4
Ayrshire & Arran (16)	131,341	124,826	5.2	657,612	608,899	8.0
Dumfries & Galloway (39)	127,403	138,678	-8.1	504,175	526,381	-4.2
Edinburgh & Lothian (56)	1,185,093	1,238,198	-4.3	5,411,911	5,497,752	-1.6
Greater Glasgow (63)	1,591,201	1,684,928	-5.6	10,838,680	9,982,514	8.6
Highlands of Scotland (75)	570,040	557,137	2.3	2,083,620	2,041,954	2.0
Kingdom of Fife (30)	106,430	117,986	-9.8	478,101	488,751	-2.2
Orkney (20)	115,317	89,910	28.3	351,512	308,758	13.8
Outer Hebrides (6)	16,959	16,919	0.2	67,339	62,594	7.6
Perthshire (24)	194,038	172,464	12.5	703,340	680,094	3.4
Scottish Borders (36)	112,533	114,805	-2.0	528,939	558,720	-5.3
Shetland Islands (17)	22,907	16,471	39.1	88,038	59,229	48.6
SCOTLAND (532)	4,981,352	5,125,702	-2.8	25,418,183	24,626,627	3.2
Greater Glasgow (62)(ex-K'grove)	1,368,138	1,274,551	7.3	9,132,919	9,157,861	-0.3

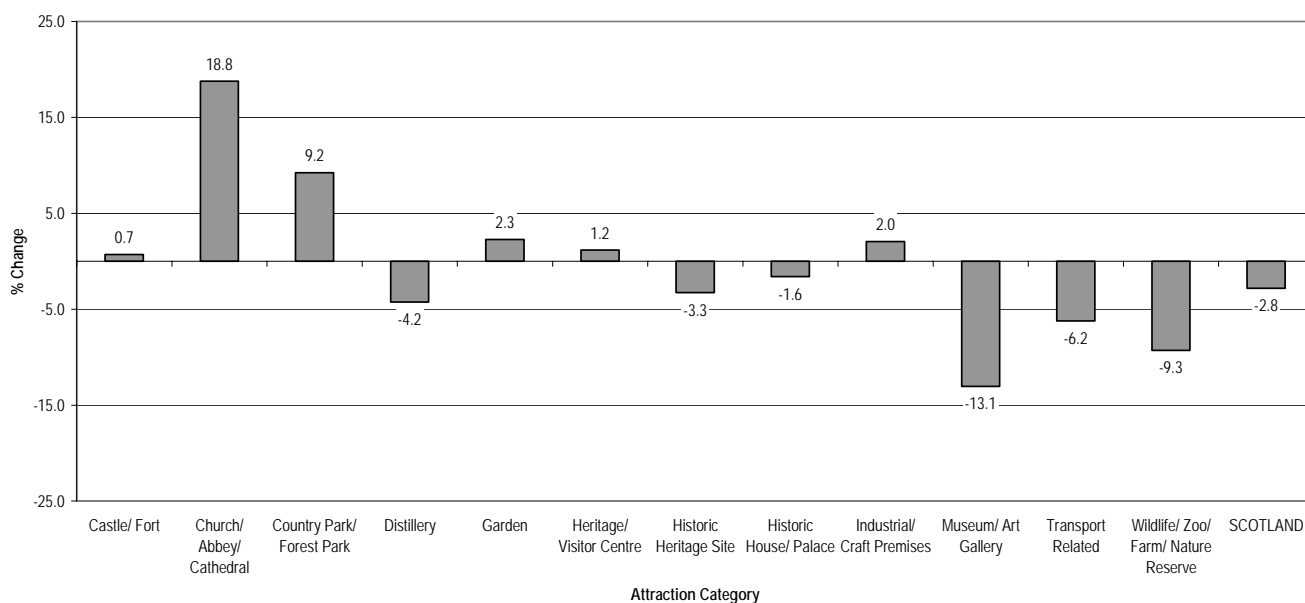
Note: Number in brackets indicates the number of visitor attractions per region.

Performance by VisitScotland Region August 2007/2006


4.0 PERFORMANCE BY ATTRACTION CATEGORY
Performance by Attraction Category – August 2007/2006 and January-August 2007/2006

Category	Aug-07	Aug-06	% Change	Jan-Aug07	Jan-Aug06	%Change
Castle/ Fort (58)	724,825	719,791	0.7	2,813,905	2,826,586	-0.4
Church/ Abbey/ Cathedral (18)	227,093	191,160	18.8	852,150	781,235	9.1
Country Park / Forest Park (12)	883,552	808,811	9.2	6,527,100	6,582,971	-0.8
Distillery (25)	118,550	123,809	-4.2	419,054	429,153	-2.4
Garden (29)	125,203	122,426	2.3	661,125	672,578	-1.7
Heritage/ Visitor Centre (92)	695,305	687,188	1.2	3,173,456	3,096,212	2.5
Historic Heritage Site (38)	153,854	159,044	-3.3	552,586	557,820	-0.9
Historic House/ Palace (40)	143,526	145,838	-1.6	582,159	560,095	3.9
Industrial/ Craft Premises (11)	17,829	17,471	2.0	80,550	77,543	3.9
Museum/ Art Gallery (177)	1,491,953	1,715,890	-13.1	7,925,234	7,178,022	10.4
Transport Related (10)	173,916	185,436	-6.2	709,408	752,805	-5.8
Wildlife/ Zoo/ Farm/ Nature Reserve (22)	225,746	248,838	-9.3	1,121,456	1,111,607	0.9
SCOTLAND (532)	4,981,352	5,125,702	-2.8	25,418,183	24,626,627	3.2
*Museum/ Art Gallery (176)(ex-Kelvingrove)	1,268,890	1,305,513	-2.8	6,219,473	6,353,369	-2.1

Performance by Attraction Category August 2007/2006



5.0 PERFORMANCE BY LOCATION

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

Location	Aug-07	Aug-06	% Change	Jan-Aug07	Jan-Aug06	%Change
Rural (244)	1,924,380	1,869,679	2.9	9,930,324	10,045,172	-1.1
Seaside (65)	281,438	283,511	-0.7	1,084,293	1,068,072	1.5
Urban (223)	2,775,534	2,972,512	-6.6	14,403,566	13,513,383	6.6
SCOTLAND (532)	4,981,352	5,125,702	-2.8	25,418,183	24,626,627	3.2
*Urban (222)(ex-Kelvingrove)	2,552,471	2,562,135	-0.4	12,697,805	12,688,730	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 – August 2007/2006 and January-August 2007/2006

Range of Volume of Visits	Aug-07	Aug-06	% Change	Jan-Aug07	Jan-Aug06	%Change
1 - 19,999 (326)	466,730	463,648	0.7	1,804,869	1,767,547	2.1
20,000 - 49,999 (90)	521,413	525,692	-0.8	2,127,529	2,174,860	-2.2
50,000 + (116)	3,993,209	4,136,362	-3.5	21,485,785	20,684,220	3.9
SCOTLAND (532)	4,981,352	5,125,702	-2.8	25,418,183	24,626,627	3.2
*50,000 + (115)(ex-Kelvingrove)	3,770,146	3,725,985	1.2	19,780,024	19,859,567	-0.4

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 – August 2007/2006 and January-August 2007/2006

Admission	Aug-07	Aug-06	% Change	Jan-Aug07	Jan-Aug06	%Change
Free (224)	3,008,701	3,096,561	-2.8	16,910,918	16,013,369	5.6
Paid (308)	1,972,651	2,029,141	-2.8	8,507,265	8,613,258	-1.2
SCOTLAND (532)	4,981,352	5,125,702	-2.8	25,418,183	24,626,627	3.2
Free (224) (ex-Kelvingrove)	2,785,638	2,686,184	3.7	15,205,157	15,188,716	0.1

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 – August 2007/2006 and January-August 2007/2006

LEC	Aug-07	Aug-06	% Change	Jan-Aug07	Jan-Aug06	%Change
Argyll & The Islands (29)	137,373	143,907	-4.5	497,102	507,521	-2.1
Ayrshire (15)	123,217	116,820	5.5	629,794	582,369	8.1
Borders (36)	112,533	114,805	-2.0	528,939	558,720	-5.3
Caithness & Sutherland (17)	48,252	46,008	4.9	148,768	146,055	1.9
Dumfries & Galloway (38)	127,128	138,128	-8.0	502,304	524,227	-4.2
Dunbartonshire (7)	69,222	80,326	-13.8	311,358	309,586	0.6
Edinburgh & Lothian (56)	1,185,093	1,238,198	-4.3	5,411,911	5,497,752	-1.6
Fife (30)	106,430	117,986	-9.8	478,101	488,751	-2.2
Forth Valley (27)	318,826	316,966	0.6	1,442,146	1,457,379	-1.0
Glasgow (31)	632,442	825,832	-23.4	4,108,543	3,255,814	26.2
Grampian (49)	198,849	214,236	-7.2	1,037,099	1,102,351	-5.9
Inverness & East Highland (29)	278,042	266,282	4.4	1,055,723	1,024,105	3.1
Lanarkshire (20)	825,175	748,735	10.2	6,112,870	6,183,534	-1.1
Lochaber (11)	62,908	62,114	1.3	231,995	233,144	-0.5
Moray (16)	63,451	63,785	-0.5	226,381	225,271	0.5
Orkney (20)	115,317	89,910	28.3	351,512	308,758	13.8
Renfrewshire (12)	46,380	34,814	33.2	241,749	218,851	10.5
Shetland (17)	22,907	16,471	39.1	88,038	59,229	48.6
Skye & Wester Ross (15)	167,812	168,479	-0.4	594,735	588,445	1.1
Tayside (51)	323,036	304,981	5.9	1,351,776	1,292,171	4.6
Western Isles (6)	16,959	16,919	0.2	67,339	62,594	7.6
SCOTLAND (532)	4,981,352	5,125,702	-2.8	25,418,183	24,626,627	3.2
*Glasgow (30)(ex-Kelvingrove)	409,379	415,455	-1.5	2,402,782	2,431,161	-1.2

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 August 2007.

Reasons for positive impacts on visitor figures:-

New exhibition
 Improved signage
 Increase in coach bookings
 More local visitors
 More accurate method of counting visitors
 Refurbished attraction

Reasons for negative impacts in visitor figures:-

Bad weather
 Staffing issues
 Fewer UK visitors
 Problems with access

* 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