

**2007 SCOTTISH VISITOR ATTRACTION BAROMETER
January - April 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 January–April 2007 with January-April 2006. Some 566 attraction operators provided figures for the months of January–April 2007 with 540 attractions providing comparable visits figures.

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

**2.0 January-April 2007/2006
Summary**

The total number of visits representing the 540 barometer attractions in Scotland for the month of April 2007 was **3,358,593**. When compared to data from the previous year of **3,136,793** this shows a visits increase of **7.1%**. The total number of visits for the responding 540 barometer attractions in Scotland for the period January-April 2007 was **8,839,511**. When compared to data from the previous year of **8,023,009** visits, this shows a visits increase of **10.2%**.

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

Attractions	Apr-07	Apr-06	% Change	Jan-Apr07	Jan-Apr-06	%Change
540	3,358,593	3,136,793	7.1	8,839,511	8,023,009	10.2
539 (ex-Kelvingrove)	3,118,847	3,136,793	-0.6	8,067,889	8,023,009	0.6

A further breakdown is shown below, where the visits during the individual months of January-April 2007 can be compared with January-April 2006 with their % change calculations.

Attractions	Months	Visits	Months	Visits	%Change
540	Jan-07	1,606,711	Jan-06	1,530,199	5.0
	Feb-07	1,817,215	Feb-06	1,664,268	9.2
	Mar-07	2,056,992	Mar-06	1,691,749	21.6
	Apr-07	3,358,593	Apr-06	3,136,793	7.1
* 539 (ex Kelvingrove)	Apr-07	3,118,847	Apr-06	3,136,793	-0.6

The highest increase in visits recorded by VisitScotland Region in April 2007 was experienced in Greater Glasgow (20.7%) followed by Ayrshire & Arran (16.6%) and Angus & City of Dundee (11.9%). Kingdom of Fife experienced the greatest decline in visits over the same period with decreases of -8.8%. Orkney and Outer Hebrides also experienced decreases in visits figures of -8.2% and -7.3% respectively.

During this period the highest increase in visits was recorded by the Industrial/ Craft Premises category (20.0%) followed by Garden sites (14.1%) and Museum/ Art Gallery sites (11.4%). The Church/ Abbey/ Cathedral sector experienced a decline in visits of -13.7%, followed by the Distillery category with a decline of -11.6% when comparing April 2007 and April 2006.

Attractions in Rural and Urban locations experienced increases in visits of 7.8% and 7.2% respectively; whilst visits to attractions in Seaside locations experienced decreases of -2.6%. Attractions welcoming over 50,000 visits experienced the greatest increase in visits of 8.4%, with those attracting between 1 and 19,999 visits experiencing increases of 7.4%. Only those attractions welcoming between 20,000 and 49,999 experienced a decrease of -7.0%.

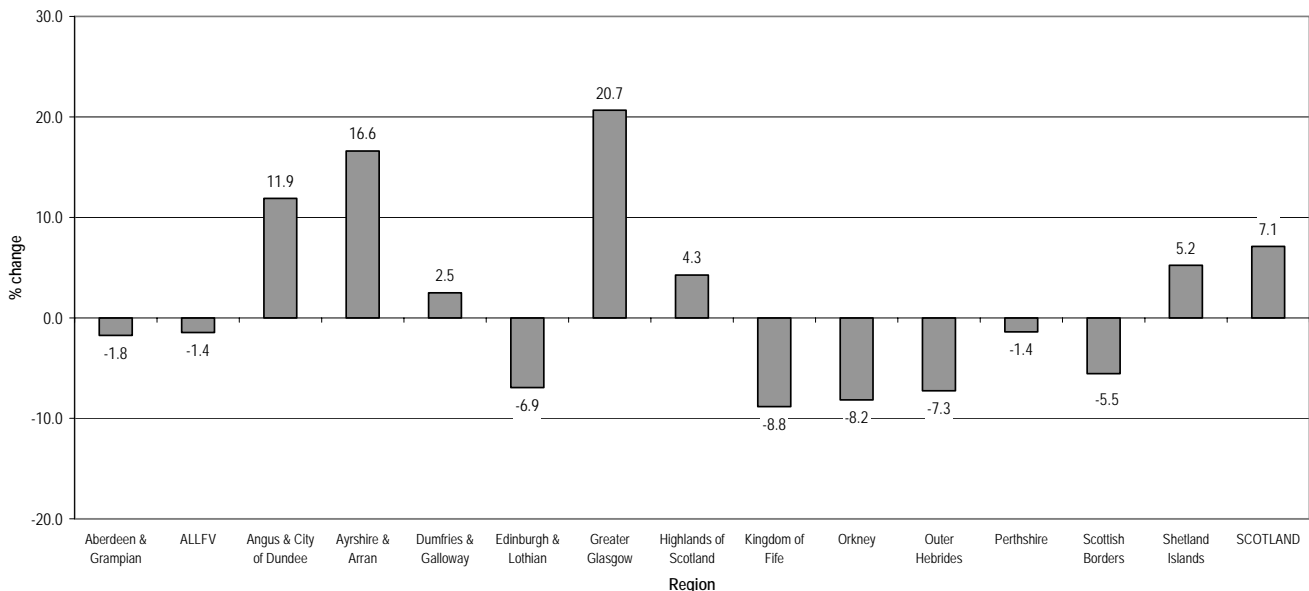
Free admission attractions experienced an increase in visits of 12.7%, whilst Paid admission attractions saw a decrease in visits of -2.5%. The highest increases in visits by LEC area were experienced by attractions in Glasgow (53.1%) and Dunbartonshire (52.9%). Caithness and Sutherland experienced the greatest decrease of -23.7% followed by Fife and Orkney who experienced decreases of -8.8% and 8.2% respectively when comparing April 2007 with April 2006.

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

Region	Apr-07	Apr-06	% Change	Jan-Apr07	Jan-Apr06	%Change
Aberdeen & Grampian (68)	183,699	186,988	-1.8	466,851	459,692	1.6
ALLFV (66)	269,252	273,202	-1.4	500,866	506,945	-1.2
Angus & City of Dundee (25)	113,356	101,307	11.9	279,725	248,534	12.5
Ayrshire & Arran (15)	82,287	70,565	16.6	176,630	161,380	9.4
Dumfries & Galloway (42)	84,611	82,556	2.5	139,554	134,554	3.7
Edinburgh & Lothian (56)	686,711	737,896	-6.9	1,886,260	1,888,284	-0.1
Greater Glasgow (62)	1,507,580	1,249,397	20.7	4,588,855	3,809,967	20.4
Highlands of Scotland (72)	209,357	200,785	4.3	388,886	388,217	0.2
Kingdom of Fife (29)	63,839	70,026	-8.8	141,132	151,857	-7.1
Orkney (19)	19,631	21,378	-8.2	26,983	28,850	-6.5
Outer Hebrides (9)	5,999	6,468	-7.3	17,155	13,808	24.2
Perthshire (24)	81,537	82,687	-1.4	132,401	134,345	-1.4
Scottish Borders (35)	49,146	52,029	-5.5	92,003	94,719	-2.9
Shetland Islands (18)	1,588	1,509	5.2	2,210	1,857	19.0
SCOTLAND (540)	3,358,593	3,136,793	7.1	8,839,511	8,023,009	10.2
*Greater Glasgow(61) (ex K'grove)	1,267,834	1,249,397	1.5	3,817,233	3,809,967	0.2

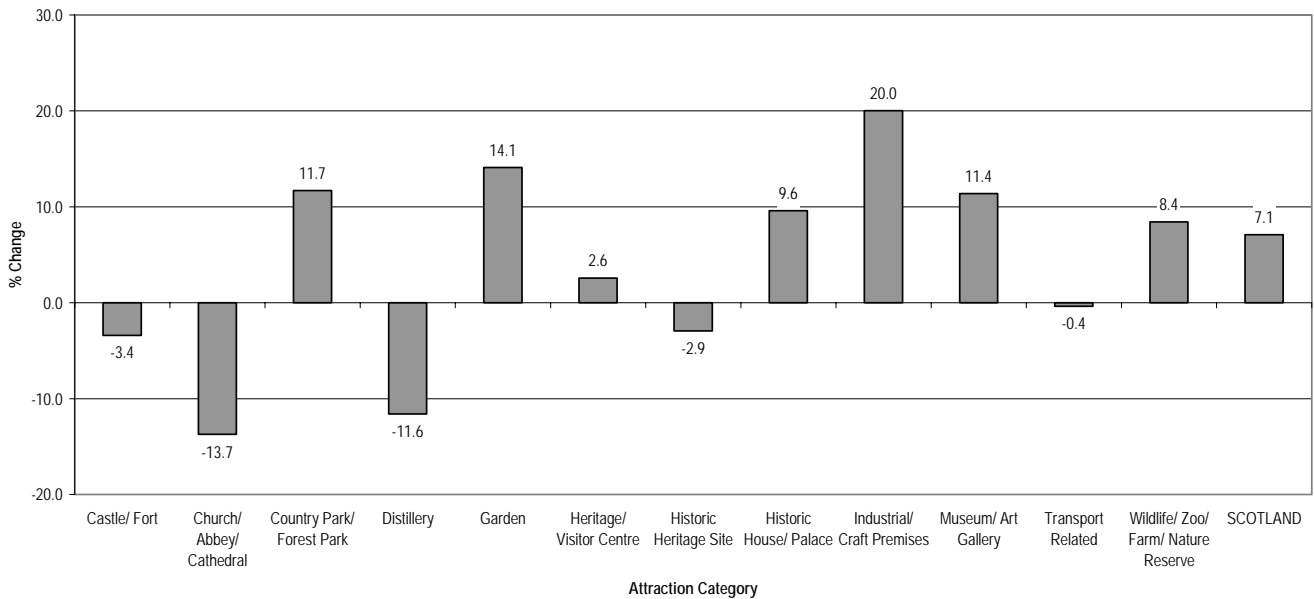
Note: Number in brackets indicates the number of visitor attractions per region.

Performance by VisitScotland Region April 2007/2006


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

Category	Apr-07	Apr-06	% Change	Jan-Apr07	Jan-Apr06	%Change
Castle/ Fort (59)	342,844	354,907	-3.4	638,985	618,435	3.3
Church/ Abbey/ Cathedral (18)	44,715	51,825	-13.7	102,995	105,640	-2.5
Country Park / Forest Park (10)	955,372	855,252	11.7	2,819,204	2,681,063	5.2
Distillery (26)	39,125	44,257	-11.6	76,759	83,113	-7.6
Garden (29)	92,700	81,234	14.1	213,020	182,365	16.8
Heritage/ Visitor Centre (97)	468,406	456,681	2.6	996,448	1,030,820	-3.3
Historic Heritage Site (41)	63,029	64,941	-2.9	102,974	100,822	2.1
Historic House/ Palace (41)	80,098	73,078	9.6	114,863	103,786	10.7
Industrial/ Craft Premises (11)	11,331	9,440	20.0	24,126	18,764	28.6
Museum/ Art Gallery (180)	999,946	897,720	11.4	3,185,851	2,582,577	23.4
Transport Related (9)	82,645	82,952	-0.4	196,323	219,579	-10.6
Wildlife / Zoo / Farm / Nature Reserve (19)	178,382	164,506	8.4	367,963	296,045	24.3
SCOTLAND (540)	3,358,593	3,136,793	7.1	8,839,511	8,023,009	10.2
*Museum/ Art Gallery (179) (ex Kelvingrove)	760,200	897,720	-15.3	2,414,229	2,582,577	-6.5

Performance by Attraction Category April 2007/2006



5.0 PERFORMANCE BY LOCATION

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

Location	Apr-07	Apr-06	% Change	Jan-Apr07	Jan-Apr06	%Change
Rural (247)	1,311,121	1,216,253	7.8	3,279,266	3,158,142	3.8
Seaside (68)	116,144	119,248	-2.6	210,579	213,132	-1.2
Urban (225)	1,931,328	1,801,292	7.2	5,349,666	4,651,735	15.0
SCOTLAND (479)	3,358,593	3,136,793	7.1	8,839,511	8,023,009	10.2
*Urban (224) (ex Kelvingrove)	1,691,582	1,801,292	-6.1	4,578,044	4,651,735	-1.6

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

6.0 PERFORMANCE BY VOLUME OF VISITS

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

Range of Volume of Visits	Apr-07	Apr-06	% Change	Jan-Apr07	Jan-Apr06	%Change
1 - 19,999 (342)	222,320	206,930	7.4	356,418	335,237	6.3
20,000 - 49,999 (87)	241,859	260,104	-7.0	490,295	531,480	-7.7
50,000 + (111)	2,894,414	2,669,759	8.4	7,992,798	7,156,292	11.7
SCOTLAND (540)	3,358,593	3,136,793	7.1	8,839,511	8,023,009	10.2
*50,000 + (110) (ex Kelvingrove)	2,654,668	2,669,759	-0.6	7,221,176	7,156,292	0.9

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 – April 2007/2006 and January-April 2007/2006

Admission	Apr-07	Apr-06	% Change	Jan-Apr07	Jan-Apr06	%Change
Free (227)	2,224,930	1,974,195	12.7	6,520,631	5,770,778	13.0
Paid (313)	1,133,663	1,162,598	-2.5	2,318,880	2,252,231	3.0
SCOTLAND (540)	3,358,593	3,136,793	7.1	8,839,511	8,023,009	10.2
*Free (226) (ex Kelvingrove)	1,985,184	1,974,195	0.6	5,749,009	5,770,778	-0.4

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 – April 2007/2006 and January-April 2007/2006

LEC	Apr-07	Apr-06	% Change	Jan-Apr07	Jan-Apr06	%Change
Argyll & The Islands (33)	57,706	61,671	-6.4	86,061	93,102	-7.6
Ayrshire (14)	78,860	68,055	15.9	173,203	158,870	9.0
Borders (35)	49,146	52,029	-5.5	92,003	94,719	-2.9
Caithness & Sutherland (16)	9,500	12,459	-23.7	10,412	13,453	-22.6
Dumfries & Galloway (41)	84,065	82,176	2.3	139,008	134,174	3.6
Dunbartonshire (7)	49,783	32,559	52.9	82,991	64,757	28.2
Edinburgh & Lothian (56)	686,711	737,896	-6.9	1,886,260	1,888,284	-0.1
Fife (29)	63,839	70,026	-8.8	141,132	151,857	-7.1
Forth Valley (28)	222,967	229,332	-2.8	434,360	433,865	0.1
Glasgow (29)	510,923	333,630	53.1	1,691,689	977,444	73.1
Grampian (52)	133,366	132,011	1.0	338,312	335,195	0.9
Inverness & East Highland (30)	125,684	120,142	4.6	251,173	241,623	4.0
Lanarkshire (21)	874,899	811,640	7.8	2,608,556	2,568,923	1.5
Lochaber (10)	26,008	22,546	15.4	47,684	48,097	-0.9
Moray (18)	52,039	56,225	-7.4	130,088	125,745	3.5
Orkney (19)	19,631	21,378	-8.2	26,983	28,850	-6.5
Renfrewshire (12)	63,425	56,880	11.5	186,692	179,940	3.8
Shetland (18)	1,588	1,509	5.2	2,210	1,857	19.0
Skye & Wester Ross (13)	41,695	39,806	4.7	73,433	79,212	-7.3
Tayside (50)	200,759	188,355	6.6	420,106	389,234	7.9
Western Isles (9)	5,999	6,468	-7.3	17,155	13,808	24.2
SCOTLAND (540)	3,358,593	3,136,793	7.1	8,839,511	8,023,009	10.2
*Glasgow (28) (ex Kelvingrove)	271,177	333,630	-18.7	920,067	977,444	-5.9

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 January - April 2007.

Reasons for positive impacts on visitor figures:-

Good weather
 Busy Easter weekend
 'Tartan Week'
 Successful exhibition
 New publicity campaign

Reasons for negative impacts in visitor figures:-

Lack of signage
 Fewer exhibits
 Introduction of admission fees
 Closure for refurbishment

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