

**2006 SCOTTISH VISITOR ATTRACTION BAROMETER
September 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, 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 September 2006 with September 2005. Some 504 attraction operators provided figures for the month of September 2006 with 495 attractions providing comparable visits figures.

**2.0 SEPTEMBER 2006/2005
Summary**

The total number of visits representing the 495 barometer attractions in Scotland for the month of September 2006 was **3,130,746**. When compared to data from the previous year of **2,823,375** this shows a visits increase of **10.9%**. The total number of visits for the responding 495 barometer attractions in Scotland for the period January-September 2006 was **26,323,344**. When compared to data from the previous year of **25,219,022** visits, this shows a visits increase of **4.4%**.

*The re-opening of Kelvingrove Museum and Art Gallery in July has had a significant influence in shaping performance for September 2006. 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 September 2006/2005 and January-September 2006/2005 as well as the % change calculation.

Attractions	Sep-06	Sep-05	% Change	Jan-Sep06	Jan-Sep05	%Change
495	3,130,746	2,823,375	10.9	26,323,344	25,219,022	4.4
* 494 (ex Kelvingrove)	2,843,768	2,823,375	0.7	25,211,713	25,219,022	0.0

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

Attractions	Months	Visits	Months	Visits	%Change
495	Jan-06	1,504,142	Jan-05	1,264,528	18.9
	Feb-06	1,597,830	Feb-05	1,535,181	4.1
	Mar-06	1,637,585	Mar-05	2,117,111	-22.7
	Apr-06	3,003,558	Apr-05	2,619,923	14.6
	May-06	2,733,310	May-05	2,940,953	-7.1
	Jun-06	3,220,056	Jun-05	3,222,042	-0.1
	Jul-06	4,700,747	Jul-05	4,174,314	12.6
	Aug-06	4,795,370	Aug-05	4,521,595	6.1
	Sep-06	3,130,746	Sep-05	2,823,375	10.9
* 494 (ex Kelvingrove)	Sep-06	2,843,768	Sep-05	2,823,375	0.7

The highest increase in visits recorded by VisitScotland Region in September 2006 was experienced in Greater Glasgow (24.1%) and Shetland Islands (23.2%). Ayrshire and Arran experienced the greatest decline in visits over the same period with decreases of -11.7%. Scottish Borders and Outer Hebrides also experienced decreases in visits figures of -9.8% and -9.6% respectively.

During this period the highest increase in visits was recorded by Museum/ Art Gallery category (50.3%) followed by Church/ Abbey/ Cathedral sites (20.4%). The Transport Related category experienced a decline in visits of -13.8%, followed by the Historic House/ Palace category with a decline of -7.7% and Country Park/ Forest Park experiencing a decline of -7.2%, comparing September 2006 and September 2005.

Attractions in Urban and Seaside locations experienced increases in visits of 23.6% and 6% respectively; whilst visits to attractions in Rural locations experienced decreases of -6.1%. Attractions welcoming over 50,000 visits experienced the greatest increase in visits of 13.2%, with those attracting between 1 and 19,999 visits and 20,000 and 49,999 experiencing increases of 0.8% and 0.2% respectively.

Free admission attractions experienced an increase in visits of 19.7%, whilst Paid admission attractions saw a decrease in visits of -4.3%. The highest increases in visits by LEC area were experienced by attractions in Glasgow (108.1%), Caithness & Sutherland (30.3%) and Shetland (23.2%), whereas Ayrshire and Borders experienced decreases in visits of -13.1% and 9.8% respectively when comparing September 2006 with September 2005.

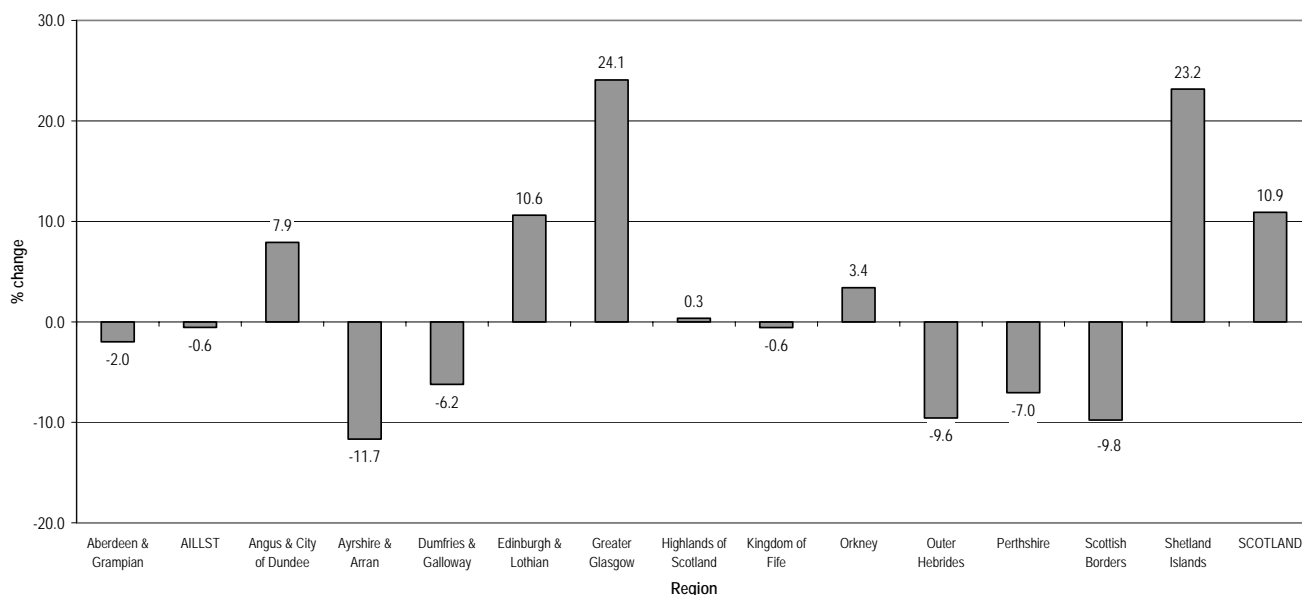
3.0 PERFORMANCE BY VISITSCOTLAND REGION

Performance by VisitScotland Region – September 2006/2005 and January-September 2006/2005

Region	Sep-06	Sep-05	% Change	Jan-Sep06	Jan-Sep05	%Change
Aberdeen & Grampian (63)	174,520	178,069	-2.0	1,557,768	1,597,563	-2.5
ALLST (54)	260,109	261,562	-0.6	2,024,532	2,004,029	1.0
Angus & City of Dundee (27)	105,185	97,481	7.9	1,036,846	942,273	10.0
Ayrshire & Arran (14)	37,098	42,000	-11.7	411,827	421,789	-2.4
Dumfries & Galloway (34)	53,921	57,504	-6.2	491,220	497,643	-1.3
Edinburgh & Lothian (61)	686,005	620,238	10.6	5,708,054	5,425,765	5.2
Greater Glasgow (61)	1,321,896	1,065,342	24.1	11,273,590	10,458,381	7.8
Highlands of Scotland (67)	233,282	232,472	0.3	1,786,134	1,786,258	0.0
Kingdom of Fife (27)	71,771	72,188	-0.6	582,708	581,596	0.2
Orkney (18)	40,865	39,519	3.4	330,235	343,412	-3.8
Outer Hebrides (5)	6,225	6,883	-9.6	51,837	52,819	-1.9
Perthshire (21)	86,465	93,011	-7.0	614,438	629,200	-2.3
Scottish Borders (28)	46,376	51,400	-9.8	389,353	416,312	-6.5
Shetland Islands (15)	7,028	5,706	23.2	64,802	61,982	4.5
SCOTLAND (495)	3,130,746	2,823,375	10.9	26,323,344	25,219,022	4.4
*Greater Glasgow (60) (ex K'grove)	984,918	1,065,342	-7.5	10,111,959	10,458,381	-3.3

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

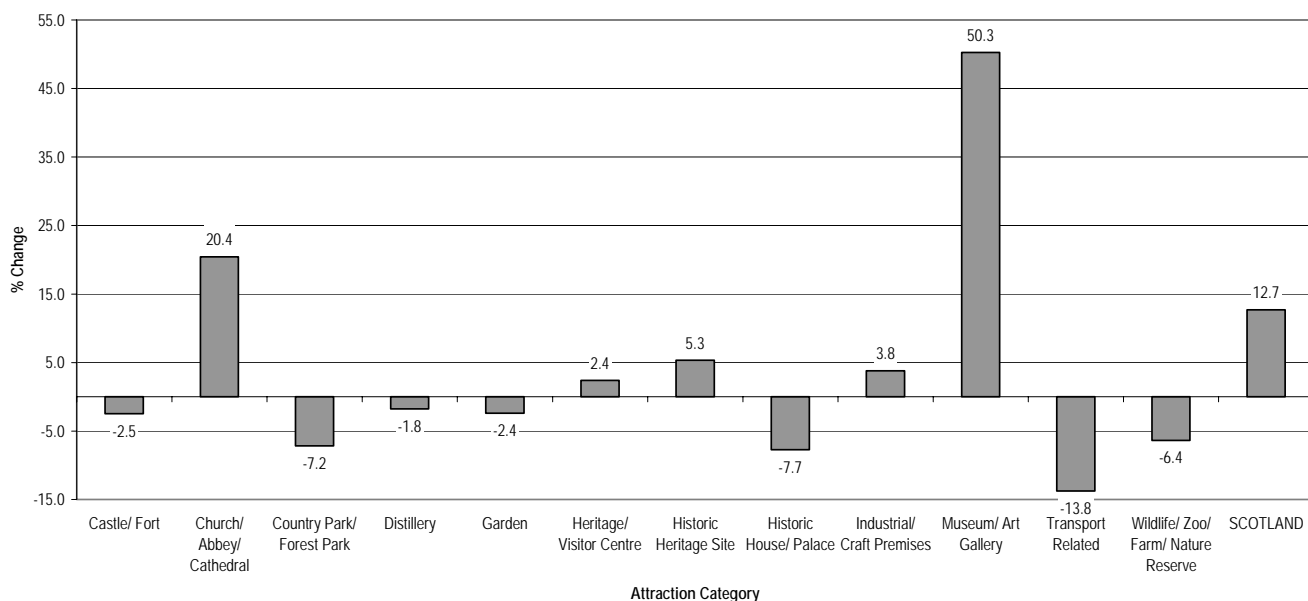
Performance by VisitScotland Region September 2006/2005


4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – September 2006/2005 and January-September 2006/2005

Category	Sep-06	Sep-05	% Change	Jan-Sep06	Jan-Sep05	%Change
Castle/ Fort (63)	339,560	348,187	-2.5	3,002,724	2,958,892	1.5
Church/ Abbey/ Cathedral (14)	66,900	55,553	20.4	507,314	420,267	20.7
Country Park / Forest Park (10)	705,422	759,935	-7.2	7,409,241	7,689,244	-3.6
Distillery (21)	53,278	54,232	-1.8	340,827	356,963	-4.5
Garden (26)	81,612	83,616	-2.4	721,929	755,822	-4.5
Heritage/ Visitor Centre (75)	344,349	336,259	2.4	2,653,271	2,635,437	0.7
Historic Heritage Site (37)	80,233	76,171	5.3	653,400	625,776	4.4
Historic House/ Palace (42)	96,934	105,055	-7.7	782,889	813,249	-3.7
Industrial/ Craft Premises (10)	21,728	20,938	3.8	156,480	168,893	-7.3
Museum/ Art Gallery (166)	1,139,750	758,544	50.3	8,205,935	6,933,782	18.3
Transport Related (9)	111,890	129,739	-13.8	774,723	811,143	-4.5
Wildlife / Zoo / Farm / Nature Reserve (22)	89,090	95,146	-6.4	1,114,611	1,049,554	6.2
SCOTLAND (495)	3,130,746	2,823,375	10.9	26,323,344	25,219,022	4.4
* Museum/ Art Gallery (165) (ex Kelvingrove)	802,772	758,544	5.8	7,044,304	6,933,782	1.5

Performance by Attraction Category September 2006/2005



5.0 PERFORMANCE BY LOCATION

Performance by Location – September 2006/2005 and January-September 2006/2005

Location	Sep-06	Sep-05	% Change	Jan-Sep06	Jan-Sep05	%Change
Rural (214)	1,069,597	1,138,814	-6.1	10,001,955	10,180,453	-1.8
Seaside (61)	129,177	121,820	6.0	988,026	964,304	2.5
Urban (220)	1,931,972	1,562,741	23.6	15,333,363	14,074,265	8.9
SCOTLAND (495)	3,130,746	2,823,375	10.9	26,323,344	25,219,022	4.4
* Urban (219) (ex Kelvingrove)	1,644,994	1,562,741	5.2	14,221,732	14,074,265	1.0

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 2006/2005 and January-September 2006/2005

Range of Volume of Visits	Sep-06	Sep-05	% Change	Jan-Sep06	Jan-Sep05	%Change
1 - 19,999 (308)	265,884	263,756	0.8	2,053,857	2,014,963	1.9
20,000 - 49,999 (74)	248,779	248,335	0.2	2,060,288	2,044,839	0.8
50,000 + (113)	2,616,083	2,311,284	13.2	22,209,199	21,159,220	5.0
SCOTLAND (495)	3,130,746	2,823,375	10.9	26,323,344	25,219,022	4.4
* 50,000 + (112) (ex Kelvingrove)	2,329,105	2,311,284	0.8	21,097,568	21,159,220	-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 2006/2005 and January-September 2006/2005

Admission	Sep-06	Sep-05	% Change	Jan-Sep06	Jan-Sep05	%Change
Free (215)	2,135,667	1,783,758	19.7	17,569,957	16,469,491	6.7
Paid (280)	995,079	1,039,617	-4.3	8,753,387	8,749,531	0.0
SCOTLAND (495)	3,130,746	2,823,375	10.9	26,323,344	25,219,022	4.4
* Free (214) (ex Kelvingrove)	1,798,689	1,783,758	0.8	16,408,326	16,469,491	-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 – September 2006/2005 and January-September 2006/2005

LEC	Sep-06	Sep-05	% Change	Jan-Sep06	Jan-Sep05	%Change
Argyll & The Islands (24)	68,527	69,866	-1.9	523,061	562,509	-7.0
Ayrshire (13)	32,845	37,814	-13.1	381,044	388,591	-1.9
Borders (28)	46,376	51,400	-9.8	389,353	416,312	-6.5
Caithness & Sutherland (17)	32,746	25,130	30.3	192,319	175,445	9.6
Dumfries & Galloway (34)	53,921	57,504	-6.2	491,220	497,643	-1.3
Dunbartonshire (9)	97,997	86,836	12.9	805,693	777,862	3.6
Edinburgh & Lothian (60)	683,564	618,442	18.6	5,685,211	5,410,825	6.0
Fife (27)	71,771	72,188	-0.6	582,708	581,596	0.2
Forth Valley (25)	141,311	153,460	-7.9	1,174,257	1,167,378	0.6
Glasgow (31)	613,700	294,841	108.1	3,888,887	2,677,795	45.2
Grampian (49)	133,227	138,028	-3.5	1,240,252	1,276,762	-2.9
Inverness & East Highland (25)	135,471	136,412	-0.7	1,099,573	1,094,985	0.4
Lanarkshire (17)	618,791	684,174	-9.6	6,479,639	6,858,108	-5.5
Lochaber (10)	31,865	34,307	-7.1	249,750	253,259	-1.4
Moray (17)	46,167	47,497	-2.8	346,380	354,396	-2.3
Orkney (18)	40,865	39,519	3.4	330,235	343,412	-3.8
Renfrewshire (11)	47,064	44,810	5.0	471,232	478,990	-1.6
Shetland (15)	7,028	5,706	23.2	64,802	61,982	4.5
Skye & Wester Ross (11)	24,490	23,453	4.4	181,526	182,558	-0.6
Tayside (49)	196,795	195,105	0.9	1,694,365	1,605,795	5.5
Western Isles (5)	6,225	6,883	-9.6	51,837	52,819	-1.9
SCOTLAND (495)	3,130,746	2,823,375	10.9	26,323,344	25,219,022	4.4
* Glasgow (30) (ex Kelvingrove)	276,722	294,841	-6.15	2,727,256	2,677,795	1.85

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 September 2006.

Reasons for positive impacts on visitor figures:-

Special event increased numbers
Less school groups
New exhibition
Doors open weekend

Reasons for negative impacts in visitor figures:-

Unpredictable weather
Less coach tours
Less cruise liners

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