

**2005 SCOTTISH VISITOR ATTRACTION BAROMETER
August 2005 REPORT**

Commissioned by VisitScotland



GLASGOW
CALEDONIAN
UNIVERSITY

Conducted by the Moffat Centre for Travel and Tourism Business Development,
Division of Management, 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@cal.ac.uk).

This Barometer compares the period of August 2005 with August 2004. Some 455 attraction operators provided figures for the month of August 2005 with 442 attractions providing comparable visits figures.

Argyll, the Isles, Loch Lomond and the Trossachs is abbreviated to ALLST throughout the report.

**2.0 August 2005/2004
Summary**

The total number of visits for the responding 442 barometer attractions in Scotland for the month of August 2005 was 3,343,019. When compared to data from the previous year of 3,328,612 visits, this shows a visits increase of **0.4%**. The total number of visits representing the 442 barometer attractions in Scotland for the period January-August 2005 was 15,102,427. When compared to data from the previous year of 15,062,810 this shows a visits increase of **0.3%**.

The following table shows total visits recorded for August 2005/2004 and January-August 2005/2004 as well as the % change calculation.

Attractions	Aug-05	Aug-04	%Change	Jan-Aug05	Jan-Aug04	%Change
442	3,343,019	3,328,612	0.4	15,102,427	15,062,810	0.3

A further breakdown is shown below, where the visits during the individual months of January-August 2005 can be compared with January-August 2004 with their % change calculations.

Attractions	Months	Visits	Months	Visits	%Change
442	Jan-05	737,878	Jan-04	714,601	3.3
	Feb-05	939,984	Feb-04	981,052	-4.2
	Mar-05	1,392,025	Mar-04	1,077,680	29.2
	Apr-05	1,690,064	Apr-04	1,870,865	-9.7
	May-05	1,954,098	May-04	1,924,520	1.5
	Jun-05	2,209,779	Jun-04	2,188,679	1.0
	Jul-05	2,835,580	Jul-04	2,976,801	-4.7
	Aug-05	3,343,019	Aug-04	3,328,612	0.4

The highest increase in visits recorded by Region in August 2005, compared with August 2004, were experienced in the Shetland Islands (10.1%); The Scottish Borders (7.8%) and Greater Glasgow (7.3%). Orkney showed the largest decreases in visits during the same period with a decline of -10% followed by Angus & City of Dundee (-9.4%) and then Argyll, the Isles, Loch Lomond and the Trossachs with a decline in visits figures of -9.2%.

During this period the highest increases in visits were recorded by the Country Park/ Forest Park category (11.6%) followed by the Museum/ Art Gallery category (5.1%). The Transport Related category experienced the largest decline in visits of -9.1%, followed by the Industrial/ Craft Premises category at -5.8% and the Castle/ Palace category at -5.2%.

Attractions located in Rural locations saw an increase in visits of 1.3% comparing August 2005 and August 2004. Attractions in Seaside locations saw a decline of -0.3%, while those in Urban areas declined by -0.2%. The attractions that welcomed over 50,000 visits saw an increase in visits of 1.2%; those welcoming under 19,999 visits saw a decrease of -3.4% and those welcoming between 20,000 and 49,000 visits experienced a decline of -2.7%.

Free admission attractions saw an increase of 2.2%; whereas paid admission attractions saw a decrease of -2% when comparing August 2005 with August 2004.

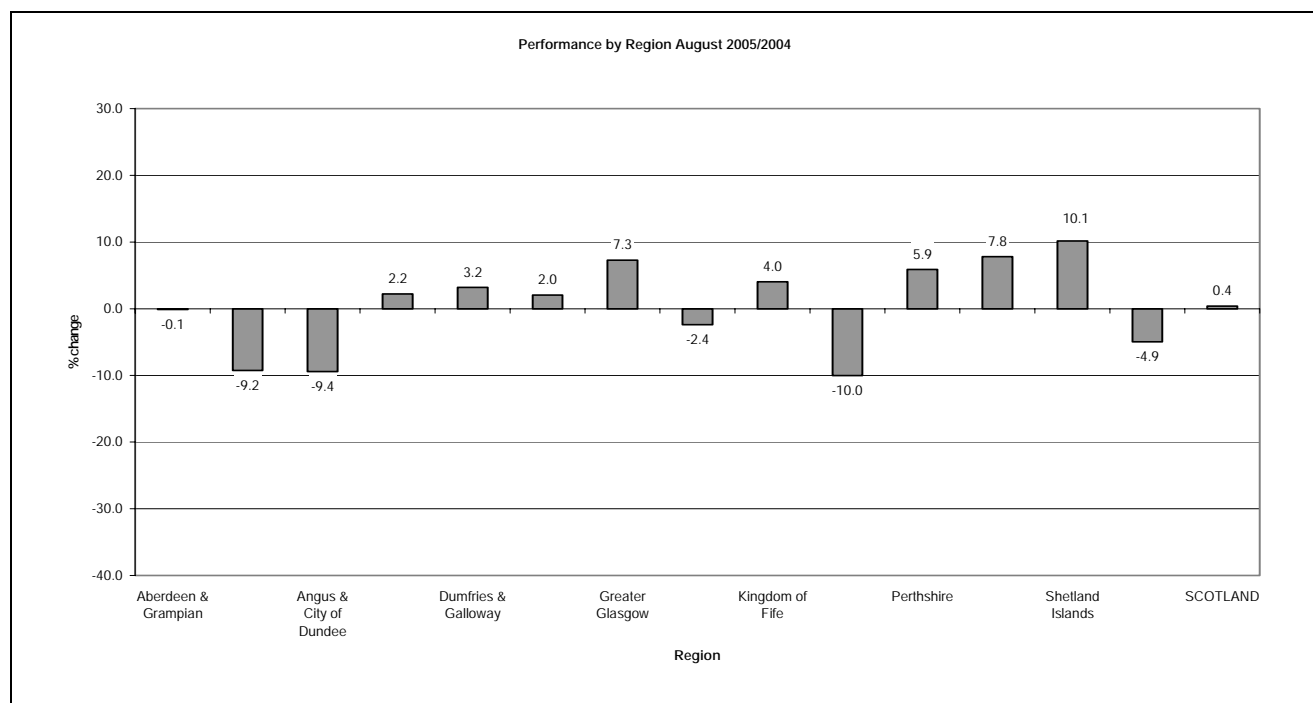
The highest increases in visits by LEC area were experienced by attractions in Skye & Lochalsh (27.8%), Lanarkshire (14.4%) and Shetland (10.1%), whereas Caithness & Sutherland; Forth Valley and Orkney experienced decreases in visits of -13.5%; -12.8% and -10% respectively.

PERFORMANCE BY REGION

Performance by Region – August 2005/2004 and January-August 2005/2004

Region	Aug-05	Aug-04	%Change	Jan-Aug05	Jan-Aug04	%Change
Aberdeen & Grampian (58)	258,578	258,887	-0.1	1,201,304	1,193,950	0.6
ALLST (49)	397,158	437,572	-9.2	1,671,937	1,803,758	-7.3
Angus & City of Dundee (21)	92,202	101,799	-9.4	558,569	613,703	-9.0
Ayrshire & Arran (16)	131,206	128,355	2.2	611,044	599,018	2.0
Dumfries & Galloway (33)	123,512	119,670	3.2	490,961	517,536	-5.1
Edinburgh & Lothian (55)	976,115	956,533	2.0	4,181,003	4,083,471	2.4
Greater Glasgow (44)	524,853	489,311	7.3	3,178,219	3,016,369	5.4
Highlands of Scotland (58)	376,127	385,292	-2.4	1,363,820	1,394,304	-2.2
Kingdom of Fife (25)	116,215	111,708	4.0	477,404	494,351	-3.4
Orkney (14)	74,472	82,751	-10.0	260,680	272,937	-4.5
Perthshire (20)	138,173	130,492	5.9	472,711	486,609	-2.9
Scottish Borders (32)	105,761	98,121	7.8	529,798	476,275	11.2
Shetland Islands (12)	13,981	12,693	10.1	44,668	48,835	-8.5
Western Isles (5)	14,666	15,428	-4.9	60,309	61,694	-2.2
SCOTLAND (442)	3,343,019	3,328,612	0.4	15,102,427	15,062,810	0.3

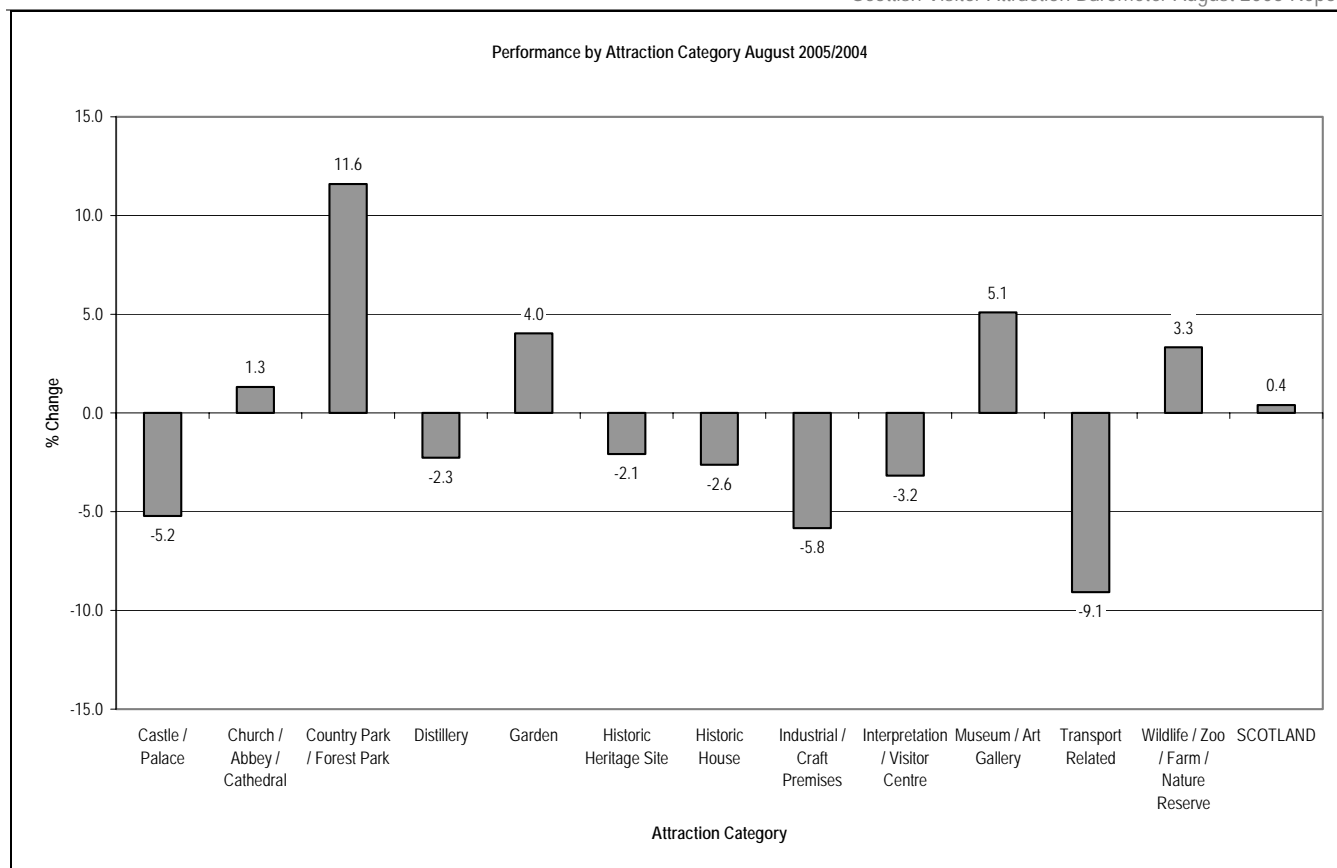
Note: Number in brackets indicates the number of visitor attractions per region.


4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – August 2005/2004 and January-August 2005/2004

Category	Aug-05	Aug-04	% Change	Jan-Aug05	Jan-Aug04	%Change
Castle / Palace (61)	619,835	653,949	-5.2	2,394,821	2,543,457	-5.8
Church / Abbey / Cathedral (16)	73,272	72,325	1.3	274,579	243,939	12.6
Country Park / Forest Park (8)	198,368	177,757	11.6	1,259,673	1,142,489	10.3
Distillery (19)	76,076	77,839	-2.3	258,130	265,529	-2.8
Garden (23)	104,476	100,426	4.0	563,877	540,160	4.4
Historic Heritage Site (33)	140,671	143,662	-2.1	488,304	519,202	-6.0
Historic House (35)	189,415	194,536	-2.6	760,073	790,672	-3.9
Industrial / Craft Premises (10)	47,834	50,795	-5.8	261,911	265,819	-1.5
Interpretation / Visitor Centre (70)	514,358	531,163	-3.2	2,259,692	2,391,126	-5.5
Museum / Art Gallery (140)	1,199,547	1,141,464	5.1	5,812,225	5,605,247	3.7
Transport Related (9)	85,626	94,167	-9.1	348,885	349,689	-0.2
Wildlife / Zoo / Farm / Nature Reserve (18)	93,541	90,529	3.3	420,257	405,481	3.6
Scotland (442)	3,343,019	3,328,612	0.4	15,102,427	15,062,810	0.3

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



5.0 PERFORMANCE BY LOCATION

Performance by Location – August 2005/2004 and January-August 2005/2004

Location	Aug-05	Aug-04	% Change	Jan-Aug05	Jan-Aug04	%Change
Rural (205)	1,110,204	1,096,734	1.2	4,743,053	4,681,735	1.3
Seaside (52)	216,710	213,469	1.5	753,172	755,579	-0.3
Urban (185)	2,016,105	2,018,409	-0.1	9,606,202	9,625,496	-0.2
Scotland (442)	3,343,019	3,328,612	0.4	15,102,427	15,062,810	0.3

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 2005/2004 and January-August 2005/2004

Range of Volume of Visits	Aug-05	Aug-04	% Change	Jan-Aug05	Jan-Aug04	%Change
1 - 19,999 (271)	412,069	412,427	-0.1	1,548,850	1,602,663	-3.4
20,000 - 49,999 (73)	421,078	418,931	0.5	1,712,335	1,759,908	-2.7
50,000 + (98)	2,509,872	2,497,254	0.5	11,841,242	11,700,239	1.2
SCOTLAND (442)	3,343,019	3,328,612	0.4	15,102,427	15,062,810	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 – August 2005/2004 and January-August 2005/2004

Admission	Aug-05	Aug-04	% Change	Jan-Aug05	Jan-Aug04	%Change
Free (181)	1,672,358	1,624,876	2.9	8,249,569	8,072,199	2.2
Paid (261)	1,670,661	1,703,736	-1.9	6,852,858	6,990,611	-2.0
SCOTLAND (442)	3,343,019	3,328,612	0.4	15,102,427	15,062,810	0.3

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 2005/2004 and January-August 2005/2004

LEC	Aug-05	Aug-04	%Change	Jan-Aug05	Jan-Aug04	%Change
Argyll & The Islands (24)	99,930	102,053	-2.1	395,794	412,284	-4.0
Ayrshire (13)	119,568	117,820	1.5	562,202	554,418	1.4
Borders (32)	105,761	98,121	7.8	529,798	476,275	11.2
Caithness & Sutherland (15)	33,488	38,717	-13.5	110,515	112,607	-1.9
Dumfries & Galloway (33)	123,512	119,670	3.2	490,961	517,536	-5.1
Dunbartonshire (5)	62,397	65,690	-5.0	323,668	355,809	-9.0
Edinburgh & Lothian (55)	976,115	956,533	2.0	4,181,003	4,083,471	2.4
Fife (25)	116,215	111,708	4.0	477,404	494,351	-3.4
Forth Valley (25)	268,094	307,441	-12.8	1,130,143	1,231,181	-8.2
Glasgow (26)	337,332	315,011	7.1	2,014,882	1,937,161	4.0
Grampian (44)	199,312	195,363	2.0	955,136	946,251	0.9
Inverness, Nairn, Badenoch & Strathspey (16)	223,399	226,604	-1.4	825,904	825,888	0.0
Lanarkshire (7)	102,990	90,057	14.4	609,201	539,936	12.8
Lochaber (10)	64,233	61,624	4.2	233,351	247,717	-5.8
Moray (14)	55,785	59,138	-5.7	231,375	227,319	1.8
Orkney (14)	74,472	82,751	-10.0	260,680	272,937	-4.5
Renfrewshire (10)	65,267	62,446	4.5	435,861	407,953	6.8
Ross & Cromarty (12)	41,978	44,324	-5.3	145,784	156,720	-7.0
Shetland (12)	13,981	12,693	10.1	44,668	48,835	-8.5
Skye & Lochalsh (4)	8,277	6,475	27.8	31,270	29,087	7.5
Tayside (41)	236,247	238,945	-1.1	1,052,518	1,123,380	-6.3
Western Isles (5)	14,666	15,428	-4.9	60,309	61,694	-2.2
SCOTLAND (442)	3,343,019	3,328,612	0.4	15,102,427	15,062,810	0.3

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

* Badenoch & Strathspey, once part of Moray, Badenoch and Strathspey Enterprise have now transferred to Inverness and Nairn Enterprise following LEC boundary revisions.

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 August 2005.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Annual Wallace Fair Boosted Visitor Numbers	Poor Weather
Special Exhibitions	Wettest August For Almost A Decade
Higher Number Of Independent Travellers	Negative Economic Climate
Reduced Admission Costs	Not Seeing Many Overseas Visitors
More Family Business	Attraction Closed Due To Illness
	Attraction Closed Due To Staff Shortages

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