

2003 SCOTTISH VISITOR ATTRACTION BAROMETER August 2003 REPORT

Commissioned by VisitScotland

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, based on contacting 405 attractions. If you have any comments or suggestions on this report, please contact Norin Arshed (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: n.arshed@gcal.ac.uk).

2.0 AUGUST 2003/2002 AND JANUARY – AUGUST 2003/2002

Summary

This Barometer compares the period of August 2003 with August 2002. It is based on contacting 405 visitor attractions in Scotland. Some 386 attraction operators provided figures for the month of August 2003, a response rate of 95%. The visitor figures recorded can be compared with data collected in year 2002. No estimated figures have been used for this Barometer to give a more accurate analysis. Where there are less than 4 respondents in any section, no comparative % change will be noted because of low sample size (this is indicated by an asterisk).

The following table shows total visits recorded for August 2003/2002 and Jan-August 2003/2002 as well as the % change calculation.

Attractions	Aug-03	Aug-02	% Change	Jan-Aug03	Jan-Aug02	% Change
386	3,332,281	3,171,725	5.1	14,744,697	14,499,305	1.7

The total number of visits representing the 386 barometer attractions in Scotland for the period August 2003 was **3,332,281**. When compared to comparable data from the previous year of **3,171,725** visits, this shows a visits increase of **5.1%**. When the total visits figure for 2003 of **14,744,697** is compared with year 2002's total visits figure of **14,499,305**, performance for year 2003 shows an increase in visits of **1.7%**. A further breakdown is shown below, where the months of January-August 2003 can be compared with January-August 2002 with their % change calculations.

Attractions	Month	Visits	Month	Visits	% Change
386	Jan-03	701,074	Jan-02	677,093	3.5
	Feb-03	900,641	Feb-02	878,647	2.5
	Mar-03	1,080,058	Mar-02	1,234,975	-12.5
	Apr-03	1,866,731	Apr-02	1,674,092	11.5
	May-03	1,866,824	May-02	1,847,019	1.1
	Jun-03	2,173,588	Jun-02	2,243,890	-3.1
	Jul-03	2,823,500	Jul-02	2,771,864	1.9
	Aug-03	3,332,281	Aug-02	3,171,725	5.1

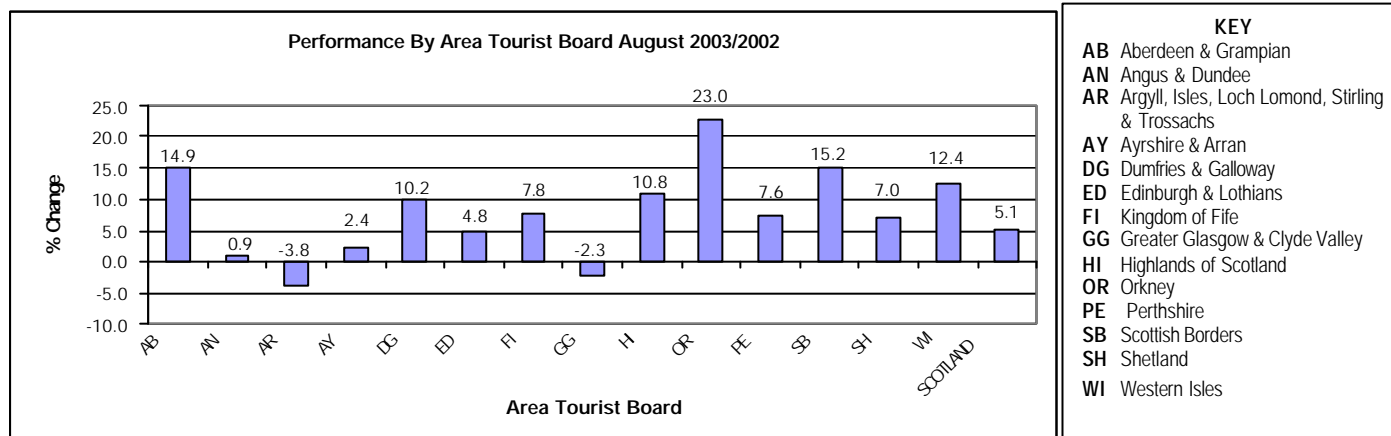
The highest increase in visits recorded by ATB area in August were experienced in Orkney (23.0%), the Scottish Borders (15.2%) and Aberdeen & Grampian (14.9%). ALLST showed the largest decrease in visits during the same period with a decline of -3.8%. Greater Glasgow saw a decline on visit figures (-2.3%) with a total of 7,810 less visitors in August 2003. During the month of August 2003 the highest increases in visits were recorded by Historic Heritage Sites (28.6%), Gardens (24.4%) and the Church/ Abbey/ Cathedral category (23.8%). The Museum or Art Gallery category saw a decline in visits of -8.1%, followed by the Interpretation/ Visitor Centre category with -1.2% and the Industrial/Craft Premises category experiencing a small decrease of -0.1%.

The greatest increases in visits were experienced by attractions located in Seaside areas (27.4%) followed by Rural areas (7.8%). Attractions achieving volume of 119,999 visits experienced a substantial increase of 21.0%. Free admission attractions for the month of August experienced a decrease of -1.5%, whereas Paid admission attractions experienced an increase of 11.2%. The highest increases in visits by LEC area were experienced by attractions in Lanarkshire (30.7%), Renfrewshire (29.3%) and Caithness & Sutherland (27.4%). Skye and Lochalsh experienced the largest decrease in visits of -18.1%, followed by Glasgow with -6.3% and Forth Valley with -5.6%.

3.0 PERFORMANCE BY AREA TOURIST BOARD
Performance by Area Tourist Board – August 2003/2002 and January-August 2003/2002

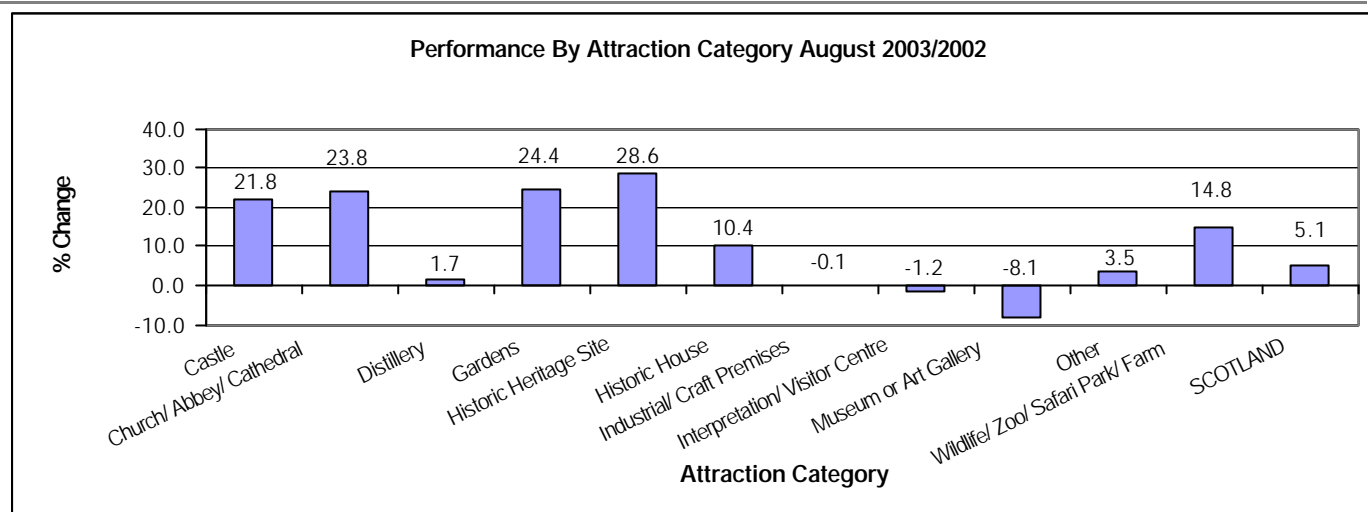
ATB Area	Aug-03	Aug-02	% Change	Jan-Aug03	Jan-Aug02	% Change
Aberdeen and Grampian (50)	278,418	242,293	14.9	1,378,135	1,291,684	6.7
Angus and City of Dundee (19)	108,665	107,645	0.9	535,574	507,925	5.4
ALLST (41)	471,777	490,530	-3.8	1,894,235	1,952,150	-3.0
Ayrshire and Arran (14)	121,820	118,978	2.4	536,637	515,461	4.1
Dumfries and Galloway (34)	140,084	127,117	10.2	487,122	434,786	12.0
Edinburgh and Lothian (48)	1,024,467	977,606	4.8	4,653,898	4,522,315	2.9
Kingdom of Fife (25)	114,853	106,536	7.8	466,724	458,171	1.9
Greater Glasgow (40)	336,015	343,825	-2.3	2,083,144	2,210,063	-5.7
Highlands of Scotland (37)	353,346	319,011	10.8	1,259,045	1,280,757	-1.7
Orkney (15)	93,476	75,983	23.0	286,686	259,020	10.7
Perthshire (16)	150,533	139,942	7.6	558,135	549,586	1.6
Scottish Borders (27)	97,392	84,555	15.2	444,325	371,576	19.6
Shetland Islands (13)	18,860	17,624	7.0	72,858	63,904	14.0
Western Isles (7)	22,575	20,080	12.4	88,179	81,907	7.7
SCOTLAND (386)	3,332,281	3,171,725	5.1	14,744,697	14,499,305	1.7

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


4.0 PERFORMANCE BY ATTRACTION CATEGORY
Performance by Attraction Category – August 2003/2002 and January-August 2003/2002

Attraction Category	Aug-03	Aug-02	% Change	Jan-Aug03	Jan-Aug02	% Change
Castle (51)	675,319	554,475	21.8	2,355,400	2,240,413	5.1
Church/ Abbey/ Cathedral (10)	57,404	46,357	23.8	174,286	161,641	7.8
Distillery (12)	60,198	59,188	1.7	201,762	195,659	3.1
Gardens (23)	223,211	179,494	24.4	1,104,110	955,748	15.5
Historic Heritage Site (21)	90,756	70,593	28.6	335,624	316,915	5.9
Historic House (33)	222,211	201,197	10.4	837,058	798,805	4.8
Industrial/ Craft Premises (11)	56,469	56,527	-0.1	303,464	305,564	-0.7
Interpretation/ Visitor Centre (60)	524,583	530,805	-1.2	2,276,659	2,167,262	5.0
Museum or Art Gallery (125)	949,130	1,033,227	-8.1	5,107,438	5,339,528	-4.3
Other (20)	291,560	281,768	3.5	1,264,251	1,298,614	-2.6
Wildlife/ Zoo/ Safari Park/ Farm (11)	181,440	158,094	14.8	784,645	719,156	9.1
SCOTLAND (386)	3,332,281	3,171,725	5.1	14,744,697	14,499,305	1.7

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



5.0 PERFORMANCE BY LOCATION

Performance by Location – August 2003/2002 and January-August 2003/2002

Location Category	Aug-03	Aug-02	% Change	Jan-Aug03	Jan-Aug02	% Change
City (69)	1,551,054	1,534,808	1.1	7,603,798	7,605,126	0.0
Rural (167)	1,076,450	998,468	7.8	4,314,688	4,147,717	4.0
Seaside (54)	254,325	199,671	27.4	834,609	748,756	11.5
Urban (96)	450,452	438,778	2.7	1,991,602	1,997,706	-0.3
SCOTLAND (386)	3,332,281	3,171,725	5.1	14,744,697	14,499,305	1.7

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 2003/2002 and January-August 2003/2002

Range of Volume of Visits	Aug-03	Aug-02	% Change	Jan-Aug03	Jan-Aug02	% Change
1 - 19,999 (228)	486,768	402,351	21.0	1,752,728	1,561,133	12.3
20,000 - 49,999 (70)	461,399	443,837	4.0	1,923,055	1,840,775	4.5
50,000 + (88)	2,384,114	2,325,537	2.5	11,068,914	11,097,397	-0.3
SCOTLAND (386)	3,332,281	3,171,725	5.1	14,744,697	14,499,305	1.7

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 2003/2002 and January-August 2003/2002

Type	Aug-03	Aug-02	% Change	Jan-Aug03	Jan-Aug02	% Change
Free (168)	1,503,294	1,526,665	-1.5	7,516,535	7,514,286	0.0
Paid (218)	1,828,987	1,645,060	11.2	7,228,162	6,985,019	3.5
SCOTLAND (386)	3,332,281	3,171,725	5.1	14,744,697	14,499,305	1.7

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

7.0 PERFORMANCE BY LOCAL ENTERPRISE COMPANY (LEC) AREA**Performance by LEC Area – August 2003/2002 and January-August 2003/2002**

LEC Area	Aug-03	Aug-02	% Change	Jan-Aug03	Jan-Aug02	% Change
Argyll & The Islands (16)	94,171	91,805	2.6	386,116	360,718	7.0
Ayrshire (13)	113,366	111,276	1.9	502,514	487,150	3.2
Borders (27)	97,392	84,555	15.2	444,325	371,576	19.6
Caithness & Sutherland (7)	28,154	22,101	27.4	76,338	63,047	21.1
Dumfries & Galloway (34)	140,084	127,117	10.2	487,122	434,786	12.0
Dunbartonshire *	31,848	35,447		189,243	219,786	
Edinburgh & Lothian (48)	1,024,467	977,606	4.8	4,653,898	4,522,315	2.9
Fife (25)	114,853	106,536	7.8	466,724	458,171	1.9
Forth Valley (23)	370,863	392,703	-5.6	1,486,682	1,566,837	-5.1
Glasgow (19)	257,706	274,999	-6.3	1,636,955	1,757,543	-6.9
Grampian (35)	194,490	160,320	21.3	1,011,371	917,374	10.2
Inverness & Nairn (8)	175,591	151,941	15.6	583,363	637,337	-8.5
Lanarkshire (12)	37,308	28,540	30.7	186,428	178,322	4.5
Lochaber (7)	66,211	60,748	9.0	246,832	208,437	18.4
Moray, Badenoch & Strathspey (19)	127,276	127,358	-0.1	569,928	610,145	-6.6
Orkney (15)	93,476	75,983	23.0	286,686	259,020	10.7
Renfrewshire (8)	18,085	13,985	29.3	105,534	90,329	16.8
Ross & Cromarty (7)	34,099	31,579	8.0	125,018	107,309	16.5
Shetland (13)	18,860	17,624	7.0	72,858	63,904	14.0
Skye & Lochalsh (4)	5,943	7,257	-18.1	24,330	28,792	-15.5
Tayside (36)	265,463	252,165	5.3	1,114,253	1,074,500	3.7
Western Isles (7)	22,575	20,080	12.4	88,179	81,907	7.7
SCOTLAND (386)	3,332,281	3,171,725	5.1	14,744,697	14,499,305	1.7

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 help epitomise the reasons that have impacted on visitation performance during the period August 2003.

Reasons for positive impacts on visitor figures:-

A dry, warm and sunny month with only 1 day of very wet weather.

The good weather in the first two weeks of August, drew larger numbers than ever before. The higher numbers are also attributed to television advertising in July.

Excellent weather conditions throughout August, helped our August numbers considerably.

There have been a large number of Cruise liners visiting Orkney this month and the number of people on day trips have also increased.

Festival exhibitions and activities increased visitors.

Increase over August due to special events and major exhibition.

Much more UK trade this year.

Reasons for negative impacts in visitor figures:-

Still not a lot of overseas visitors.

Overseas cancellations.

Hot weather reduced visitor numbers.