

**2004 SCOTTISH VISITOR ATTRACTION BARMETER
JULY 2004 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 visit figures, based on contacting 487 attractions. If you have any comments or suggestions, please contact Norin Arshed (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: n.arshed@cal.ac.uk).

This Barometer compares the period July 2004 with July 2003. It is based on 487 visitor attractions in Scotland. Some 417 attraction operators provided figures for the month of July 2004 with a response rate of 86%.

The visitor figures recorded can be compared with data collected in year 2003. Where there are 4 or less respondents in any section, no comparative % change will be noted because of low sample size (this is indicated by an asterisk).

2.0 JULY 2004/2003 AND JANUARY – JULY 2004/2003

Summary

The total number of visits for the responding 417 barometer attractions in Scotland for the period January-July 2004 was 11,455,988. When compared to data from the previous year of 11,262,924 visits, this shows a visits increase of 1.7%. The total number of visits representing the 417 barometer attractions in Scotland for the period July 2004 was 2,882,832. When compared to comparable data from the previous year of 2,764,240 visits, this shows a visits increase of 4.3%.

The following table shows total visits recorded for July 2004/2003 and Jan-July 2004/2003 as well as the % change calculation.

Attractions	Jul-04	Jul-03	% Change	Jan-Jul04	Jan-Jul03	% Change
417	2,882,832	2,764,240	4.3	11,455,988	11,262,924	1.7

A further breakdown is shown below, where the months of January-July 2004 can be compared with January-July 2003 with their % change calculations.

Attractions	Month	Visits	Month	Visits	% Change
417	Jan-04	676,234	Jan-03	666,732	1.4
	Feb-04	921,304	Feb-03	884,377	4.2
	Mar-04	1,088,062	Mar-03	1,081,919	0.6
	Apr-04	1,820,344	Apr-03	1,830,011	-0.5
	May-04	1,865,870	May-03	1,832,186	1.8
	Jun-04	2,201,342	Jun-03	2,203,459	-0.1
	Jul-04	2,882,832	Jul-03	2,764,240	4.3

The largest increase of number of visits was recorded by Glasgow with 45,377 visits. However, the highest percentage increase in visits recorded by ATB area in July were experienced in the Shetland Islands (26.9%), Perthshire (16.3%) and the Scottish Borders (11.6%). Kingdom of Fife showed the largest decrease in visits during the same period with a decline of -10.5%. During the month of July 2004 the highest increases in visits were recorded by the Country Park category (21.2%), Church/ Abbey/ Cathedral (18.8%) and the Distillery category (14.0%). The Gardens category saw a decline in visits of -0.4%, followed by the Castle category with a small decrease of -0.1%.

Visitor figures by location saw an increase in the Seaside category (6.8%), Urban category (4.9%) and the Rural category (2.8%). The 50,000+ range of volume of visits, had the highest increase in visits at 4.7%. Both Free and Paid admissions saw an increase in visits of 8.9% and 0.1%, respectively. The highest increases in visits by LEC area were experienced by attractions in Shetland (26.9%), Lanarkshire (22.3%) and Tayside (12.7%). Fife experienced the largest decrease in visits of -10.5%, followed by the Western Isles with a decrease of -9.7%.

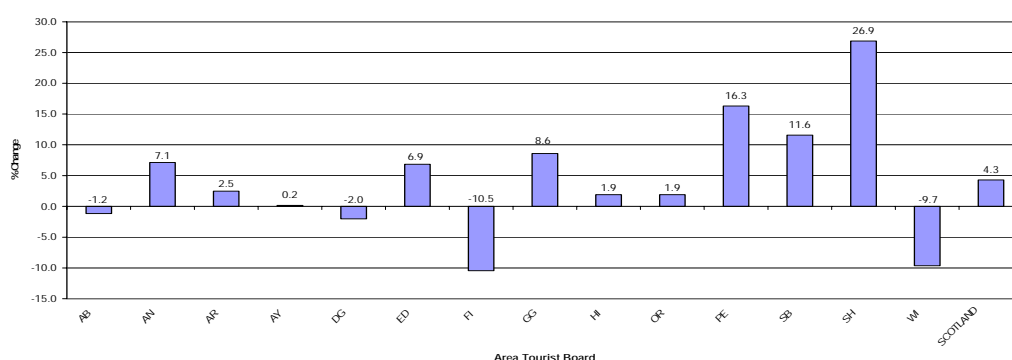
3.0 PERFORMANCE BY AREA TOURIST BOARD

Performance by Area Tourist Board – July 2004/2003 and January-July 2004/2003

ATB Area	Jul-04	Jul-03	% Change	Jan-Jul04	Jan-Jul03	% Change
Aberdeen and Grampian (57)	275,360	278,577	-1.2	996,209	1,028,217	-3.1
Angus and City of Dundee (19)	79,574	74,288	7.1	297,106	291,306	2.0
AILLST (41)	345,691	337,362	2.5	1,197,748	1,233,227	-2.9
Ayrshire and Arran (17)	147,545	147,313	0.2	511,419	522,172	-2.1
Dumfries and Galloway (33)	87,246	89,041	-2.0	329,006	317,636	3.6
Edinburgh and Lothian (45)	608,574	569,497	6.9	2,725,509	2,589,961	5.2
Kingdom of Fife (24)	98,600	110,126	-10.5	361,122	389,386	-7.3
Greater Glasgow (48)	573,313	527,936	8.6	2,847,438	2,764,738	3.0
Highlands of Scotland (50)	337,439	331,180	1.9	1,107,840	1,104,429	0.3
Orkney (16)	74,741	73,332	1.9	197,633	191,979	2.9
Perthshire (17)	127,224	109,373	16.3	411,919	379,388	8.6
Scottish Borders (29)	89,032	79,794	11.6	362,982	341,306	6.4
Shetland Islands (12)	19,407	15,296	26.9	52,704	50,390	4.6
Western Isles (9)	19,086	21,125	-9.7	57,353	58,789	-2.4
SCOTLAND (417)	2,882,832	2,764,240	4.3	11,455,988	11,262,924	1.7

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

Performance by Area Tourist Board July 2004/2003



KEY	
AB	Aberdeen & Grampian
AN	Angus & Dundee
AR	Argyll, Isles, Loch Lomond, Stirling & Trossachs
AY	Ayrshire & Arran
DG	Dumfries & Galloway
ED	Edinburgh & Lothians
FI	Kingdom of Fife
GG	Greater Glasgow & Clyde Valley
HI	Highlands of Scotland
OR	Orkney
PE	Perthshire
SB	Scottish Borders
SH	Shetland
WI	Western Isles

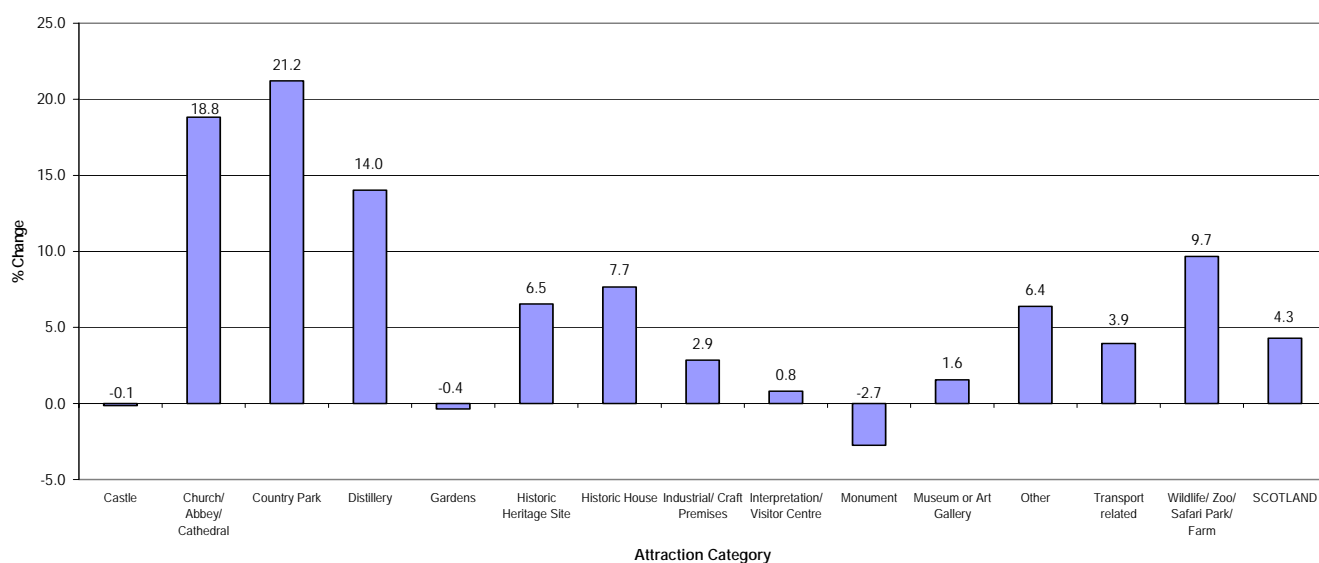
4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – July 2004/2003 and January-July 2004/2003

Attraction Category	Jul-04	Jul-03	% Change	Jan-Jul04	Jan-Jul03	% Change
Castle (59)	516,960	517,661	-0.1	1,761,001	1,764,103	-0.2
Church/ Abbey/ Cathedral (13)	119,696	100,732	18.8	404,576	351,301	15.2
Country Park (5)	244,577	201,773	21.2	1,037,241	1,040,381	-0.3
Distillery (17)	59,398	52,092	14.0	201,902	176,507	14.4
Gardens (26)	209,877	210,635	-0.4	898,072	906,225	-0.9
Historic Heritage Site (20)	64,540	60,578	6.5	182,484	173,391	5.2
Historic House (32)	133,236	123,757	7.7	468,405	452,606	3.5
Industrial/ Craft Premises (14)	55,018	53,493	2.9	246,642	253,774	-2.8
Interpretation/ Visitor Centre (65)	450,412	446,778	0.8	1,668,405	1,689,579	-1.3
Monument *	12,844	13,207		45,188	50,292	
Museum or Art Gallery (124)	659,163	649,071	1.6	3,152,844	2,982,104	5.7
Other (22)	285,892	268,737	6.4	1,157,677	1,189,555	-2.7
Transport Related (5)	15,635	15,042	3.9	44,551	45,178	-1.4
Wildlife/ Zoo/ Safari Park/ Farm *	55,584	50,684		187,000	187,928	
SCOTLAND (417)	2,882,832	2,764,240	4.3	11,455,988	11,262,924	1.7

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

Performance by Attraction Category July 2004/2003



5.0 PERFORMANCE BY LOCATION

Performance by Location – July 2004/2003 and January-July 2004/2003

Performance by Location	Jul-04	Jul-03	% Change	Jan-Jul04	Jan-Jul03	% Change
Rural (188)	1,009,070	981,986	2.8	3,366,285	3,397,862	-0.9
Seaside (59)	233,350	218,418	6.8	737,281	712,242	3.5
Urban (170)	1,640,412	1,563,836	4.9	7,352,422	7,152,820	2.8
SCOTLAND (417)	2,882,832	2,764,240	4.3	11,455,988	11,262,924	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 – July 2004/2003 and January-July 2004/2003

Range of Volume of Visits	Jul-04	Jul-03	% Change	Jan-Jul04	Jan-Jul03	% Change
1 - 19,999 (263)	429,499	414,388	3.6	1,388,951	1,340,741	3.6
20,000 - 49,999 (72)	418,614	406,397	3.0	1,467,347	1,490,956	-1.6
50,000 + (82)	2,034,719	1,943,455	4.7	8,599,690	8,431,227	2.0
SCOTLAND (417)	2,882,832	2,764,240	4.3	11,455,988	11,262,924	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 – July 2004/2003 and January-July 2004/2003

Admission Type	Jul-04	Jul-03	% Change	Jan-Jul04	Jan-Jul03	% Change
Free (161)	1,435,688	1,318,509	8.9	6,138,072	5,935,652	3.4
Paid (256)	1,447,144	1,445,731	0.1	5,317,916	5,327,272	-0.2
SCOTLAND (417)	2,882,832	2,764,240	4.3	11,455,988	11,262,924	1.7

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 – July 2004/2003 and January-July 2004/2003

LEC Area	Jul-04	Jul-03	% Change	Jan-Jul04	Jan-Jul03	% Change
Argyll & The Islands (21)	119,960	111,352	7.7	359,600	367,758	-2.2
Ayrshire (15)	135,959	136,104	-0.1	479,335	488,765	-1.9
Borders (29)	89,032	79,794	11.6	362,982	341,306	6.4
Caithness & Sutherland (12)	25,756	24,871	3.6	58,410	61,461	-5.0
Dumfries & Galloway (33)	87,246	89,041	-2.0	329,006	317,636	3.6
Dunbartonshire (6)	111,357	109,648	1.6	597,310	628,683	-5.0
Edinburgh & Lothian (45)	608,574	569,497	6.9	2,725,509	2,589,961	5.2
Fife (24)	98,600	110,126	-10.5	361,122	389,386	-7.3
Forth Valley (18)	193,713	194,350	-0.3	691,423	700,873	-1.3
Glasgow (25)	291,526	283,854	2.7	1,607,066	1,494,895	7.5
Grampian (44)	204,046	215,794	-5.4	738,019	769,956	-4.1
Inverness & Nairn (9)	135,203	129,238	4.6	418,150	415,853	0.6
Lanarkshire (13)	190,359	155,692	22.3	702,988	723,701	-2.9
Lochaber (9)	51,660	54,750	-5.6	176,473	185,579	-4.9
Moray, Badenoch & Strathspey (19)	109,701	101,508	8.1	421,384	419,869	0.4
Orkney (16)	74,741	73,332	1.9	197,633	191,979	2.9
Renfrewshire (8)	25,571	22,924	11.5	123,415	116,723	5.7
Ross & Cromarty (9)	35,600	36,429	-2.3	95,839	99,441	-3.6
Shetland (12)	19,407	15,296	26.9	52,704	50,390	4.6
Skye & Lochalsh (5)	44,915	42,386	6.0	176,043	165,135	6.6
Tayside (36)	210,820	187,129	12.7	724,224	684,785	5.8
Western Isles (9)	19,086	21,125	-9.7	57,353	58,789	-2.4
SCOTLAND (417)	2,882,832	2,764,240	4.3	11,455,988	11,262,924	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 of July 2004.

Reasons for positive impacts on visitor figures:-

Increase in overseas visitors this year compared to last year.
Local Highland games attracted visitors.
Increase number of cruise liners visiting the Isles.
Development of facilities for poor weather.
Investment in press advertising and additional tourist signs.
Better weather in July in comparison with previous months.
Fine weather appeared to bring a good number of tourists to the area.

Reasons for negative impacts in visitor figures:-

Wet weather.
Admission price has been increased.
Fewer coaches than in previous years.
Intense competition from other attractions.
Forth Road Bridge works is proving to divert tourists to other attractions and areas.