

**2004 SCOTTISH VISITOR ATTRACTION BAROMETER
JUNE 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 performance, based on contacting 485 attractions. If you have any comments or suggestions, please contact Norin Arshed (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: n.arshed@gcal.ac.uk).

This Barometer compares the period June 2004 with June 2003. It is based on 485 visitor attractions in Scotland. Some 410 attraction operators provided figures for the month of June 2004 with a response rate of 85%.

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 JUNE 2004/2003 AND JANUARY – JUNE 2004/2003

Summary

The total number of visits for the responding 410 barometer attractions in Scotland for the period January-June 2004 was 7,825,047. When compared to data from the previous year of 7,960,497 visits, this shows a visits decrease of -1.7%. The total number of visits representing the 410 barometer attractions in Scotland for the period June 2004 was 2,047,923. When compared to comparable data from the previous year of 2,117,127 visits, this shows a visits decrease of -3.3%.

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

Attractions	Jun-04	Jun-03	% Change	Jan-Jun04	Jan-Jun03	% Change
410	2,047,923	2,117,127	-3.3	7,825,047	7,960,497	-1.7

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

Sample	Months	Visits	Months	Visits	% Change
410	Jan-04	601,317	Jan-03	606,434	-0.8
	Feb-04	819,845	Feb-03	804,144	2.0
	Mar-04	964,510	Mar-03	1,012,233	-4.7
	Apr-04	1,662,506	Apr-03	1,721,186	-3.4
	May-04	1,728,946	May-03	1,699,373	1.7
	Jun-04	2,047,923	Jun-03	2,117,127	-3.3

The highest increase in visits recorded by ATB area in June were experienced in the Western Isles (11.1%), Dumfries and Galloway (9.1%) and Ayrshire and Arran (5.9%). Perthshire showed the largest decrease in visits during the same period with a decline of -16.0%. Aberdeen & Grampian saw a decline on visit figures (-14.4%) with a total of 29,036 less visitors in June 2004. During the month of June 2004 the highest increases in visits were recorded by the Industrial/Craft Premises category (7.3%), Church/ Abbey/ Cathedral (6.2%) and the Museum or Art Gallery category (5.1%). The Wildlife/ Zoo/ Safari Park/ Farm category saw a decline in visits of -14.9%, followed by the Gardens category with -12.0% and the Transport Related category experiencing a decrease of -11.0%.

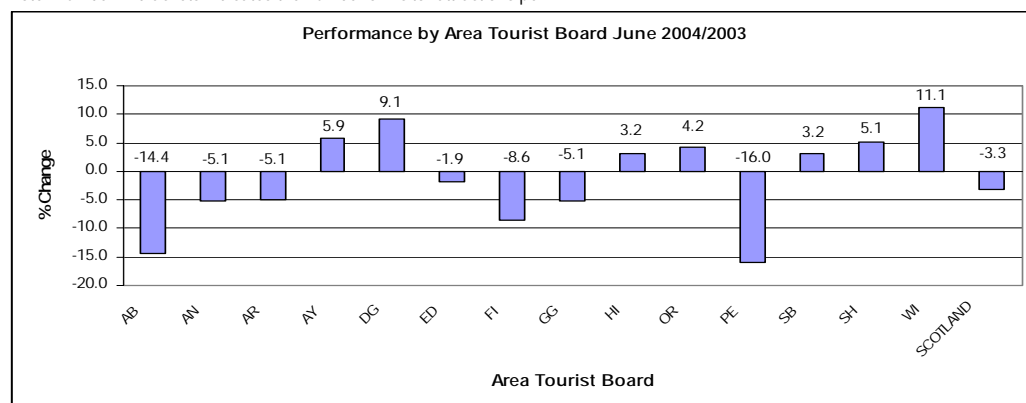
Visitor figures by location saw decrease in the Seaside category (-6.8%), Rural category (-3.5%) and the Urban category (-2.6%). Again there was no increases in the month of June for the range of volume of visits, where the highest decrease in visits was -5.7% in the 1-19,999 category. Paid admissions saw a decline in visits of -3.6%, with Free admissions also seeing decrease in visits of -2.9%. The highest increases in visits by LEC area were experienced by attractions in Ross & Cromarty (14.8%), Western Isles (11.1%) and Moray, Badenoch & Strathspey (11.0%). Grampian experienced the largest decrease in visits of -18.7%, followed by Renfrewshire with a decrease of -18.5% and Argyll & The Islands with -14.5%. Overall, the visits figures for 2004 show poor weather benefited the indoor attractions rather than those located outside and thus, the year so far has shown an overall decline in visits.

3.0 PERFORMANCE BY AREA TOURIST BOARD

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

ATB Area	Jun-04	Jun-03	% Change	Jan-Jun04	Jan-Jun03	% Change
Aberdeen and Grampian (55)	172,705	201,741	-14.4	638,664	677,561	-5.7
Angus and City of Dundee (18)	60,701	63,981	-5.1	275,899	297,535	-7.3
ALLST (43)	269,362	283,742	-5.1	960,259	1,011,888	-5.1
Ayrshire and Arran (18)	93,355	88,156	5.9	249,022	252,943	-1.6
Dumfries and Galloway (32)	66,641	61,079	9.1	241,686	228,568	5.7
Edinburgh and Lothian (51)	509,737	519,581	-1.9	2,250,210	2,234,765	0.7
Kingdom of Fife (22)	63,562	69,561	-8.6	240,162	256,531	-6.4
Greater Glasgow (39)	327,119	344,738	-5.1	1,508,223	1,550,507	-2.7
Highlands of Scotland (51)	257,312	249,448	3.2	786,331	782,430	0.5
Orkney (14)	58,244	55,873	4.2	108,734	103,398	5.2
Perthshire (18)	74,396	88,556	-16.0	245,505	257,380	-4.6
Scottish Borders (30)	67,159	65,074	3.2	253,732	241,265	5.2
Shetland Islands (12)	14,132	13,445	5.1	31,649	32,634	-3.0
Western Isles (7)	13,498	12,152	11.1	34,971	33,092	5.7
SCOTLAND (410)	2,047,923	2,117,127	-3.3	7,825,047	7,960,497	-1.7

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



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

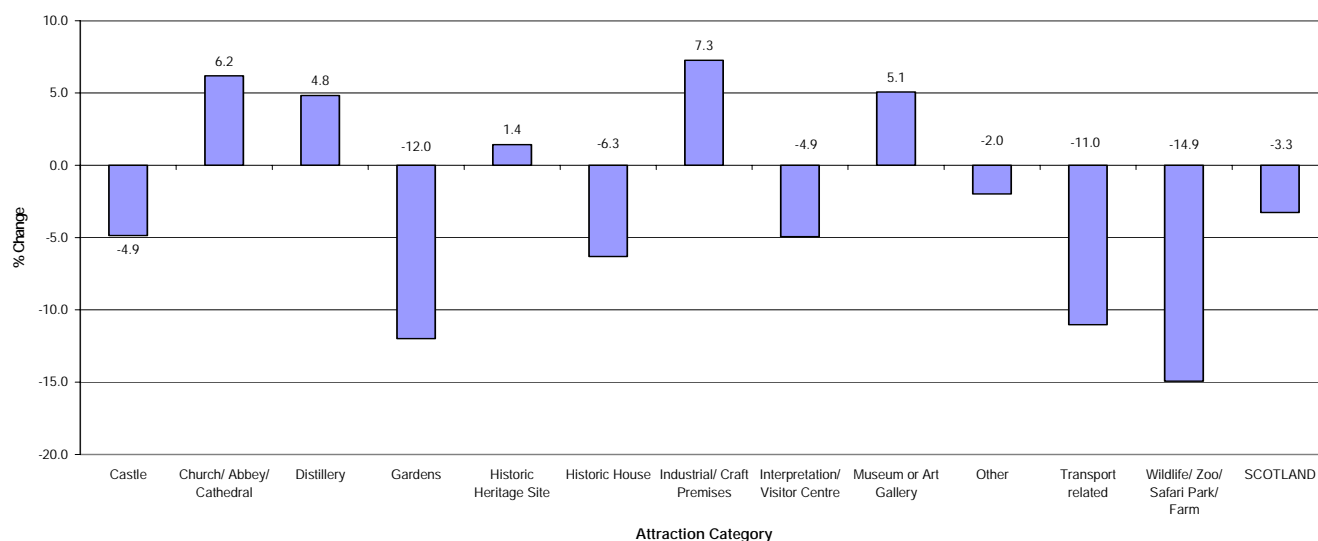
4.0 PERFORMANCE BY ATTRACTION CATEGORY

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

Attraction Category	Jun-04	Jun-03	% Change	Jan-Jun04	Jan-Jun03	% Change
Castle (58)	415,434	436,659	-4.9	1,224,924	1,245,273	-1.6
Church/ Abbey/ Cathedral (14)	85,122	80,169	6.2	285,202	251,193	13.5
Country Park*	165,810	181,122		740,756	788,551	
Distillery (19)	53,879	51,402	4.8	160,568	138,438	16.0
Gardens (24)	158,374	179,957	-12.0	681,913	692,183	-1.5
Historic Heritage Site (19)	52,525	51,784	1.4	108,402	106,644	1.6
Historic House (34)	99,653	106,371	-6.3	331,678	382,869	-13.4
Industrial/ Craft Premises (13)	21,979	20,491	7.3	70,546	79,137	-10.9
Interpretation/ Visitor Centre (62)	341,042	358,779	-4.9	1,303,556	1,328,858	-1.9
Monument*	8,126	10,475		32,344	37,085	
Museum or Art Gallery (18)	400,047	380,755	5.1	1,933,425	1,911,710	1.1
Other (21)	188,614	192,438	-2.0	744,437	786,375	-5.3
Transport Related (6)	12,728	14,307	-11.0	44,666	40,061	11.5
Wildlife/ Zoo/ Safari Park/ Farm (14)	44,590	52,418	-14.9	162,630	172,120	-5.5
SCOTLAND (410)	2,047,923	2,117,127	-3.3	7,825,047	7,960,497	-1.7

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

Performance By Attraction Category June 2004/2003



5.0 PERFORMANCE BY LOCATION

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

Performance by Location	Jun-04	Jun-03	% Change	Jan-Jun04	Jan-Jun03	% Change
Rural (189)	684,389	709,487	-3.5	2,104,333	2,170,875	-3.1
Seaside (58)	160,016	171,739	-6.8	466,536	460,320	1.4
Urban (163)	1,203,518	1,235,901	-2.6	5,254,178	5,329,302	-1.4
SCOTLAND (410)	2,047,923	2,117,127	-3.3	7,825,047	7,960,497	-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 – June 2004/2003 and January-June 2004/2003

Range of Volume Visits	Jun-04	Jun-03	% Change	Jan-Jun04	Jan-Jun03	% Change
1 - 19,999 (258)	300,991	319,269	-5.7	858,166	879,499	-2.4
20,000 - 49,999 (75)	304,758	322,117	-5.4	1,082,314	1,111,146	-2.6
50,000 + (77)	1,442,174	1,475,741	-2.3	5,884,567	5,969,852	-1.4
SCOTLAND (410)	2,047,923	2,117,127	-3.3	7,825,047	7,960,497	-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 – June 2004/2003 and January-June 2004/2003

Admission Type	Jun-04	Jun-03	% Change	Jan-Jun04	Jan-Jun03	% Change
Free (154)	911,305	938,157	-2.9	4,059,895	4,097,247	-0.9
Paid (256)	1,136,618	1,178,970	-3.6	3,765,152	3,863,250	-2.5
SCOTLAND (410)	2,047,923	2,117,127	-3.3	7,825,047	7,960,497	-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 – June 2004/2003 and January-June 2004/2003

LEC Area	Jun-04	Jun-03	% Change	Jan-Jun04	Jan-Jun03	% Change
Argyll & The Islands (22)	80,223	93,882	-14.5	242,541	259,694	-6.6
Ayrshire (16)	86,677	81,159	6.8	228,524	230,745	-1.0
Borders (30)	67,159	65,074	3.2	253,732	241,265	5.2
Caithness & Sutherland (12)	16,021	17,737	-9.7	32,654	36,590	-10.8
Dumfries & Galloway (32)	66,641	61,079	9.1	241,686	228,568	5.7
Dunbartonshire (6)	95,274	104,978	-9.2	485,953	519,035	-6.4
Edinburgh & Lothian (51)	509,737	519,581	-1.9	2,250,210	2,234,765	0.7
Fife (22)	63,562	69,561	-8.6	240,162	256,531	-6.4
Forth Valley (19)	169,634	164,994	2.8	603,011	619,258	-2.6
Glasgow (14)	107,485	100,503	6.9	539,482	511,156	5.5
Grampian (43)	137,810	169,555	-18.7	541,489	568,667	-4.8
Inverness & Nairn (10)	104,354	102,172	2.1	298,697	296,540	0.7
Lanarkshire (14)	130,320	145,622	-10.5	522,272	577,192	-9.5
Lochaber (9)	38,892	36,582	6.3	124,813	130,829	-4.6
Moray, Badenoch & Strathspey (18)	66,385	59,782	11.0	221,982	231,777	-4.2
Orkney (14)	58,244	55,873	4.2	108,734	103,398	5.2
Renfrewshire (9)	20,880	25,631	-18.5	98,357	98,206	0.2
Ross & Cromarty (9)	29,130	25,367	14.8	60,419	62,268	-3.0
Shetland (12)	14,132	13,445	5.1	31,649	32,634	-3.0
Skye & Lochalsh (5)	32,124	36,287	-11.5	131,128	122,749	6.8
Tayside (36)	139,741	156,111	-10.5	532,581	565,538	-5.8
Western Isles (7)	13,498	12,152	11.1	34,971	33,092	5.7
SCOTLAND (410)	2,047,923	2,117,127	-3.3	7,825,047	7,960,497	-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 June 2004.

Reasons for positive impacts on visitor figures:-

Large groups of visitors.

Modest improvement to the attraction.

New exhibition, where there was a prominent artist displaying works.

Increased visitor figures due to the retail operation.

Poor weather has increased our visitors as we are an indoor attraction.

Increase in school visits.

Reasons for negative impacts in visitor figures:-

Awful weather and very few tourists.

Lack of overseas visitors.

No longer a member of VisitScotland, which has meant a drop in visitor figures.

Lack of importance in recording visitor figures which shows in the decrease of numbers.

Forth Road Bridge works is proving to divert tourists to other attractions and areas.