

2003 SCOTTISH VISITOR ATTRACTION BAROMETER May 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 369 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 MAY 2003/2002 AND JANUARY – MAY 2003/2002

Summary

This Barometer compares the period of May 2003 with May 2002. In line with previous barometers, visits figures for May 2003 are compared with those collected during the same period of the previous year, i.e. 2002.

This Barometer is based on contacting 369 visitor attractions in Scotland 340 attraction operators providing figures for the month of May 2003, a response rate of 92%. 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 asterix.

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

Attractions	May-03	May-02	% Change	Jan-May03	Jan-May02	% Change
340	1,786,771	1,771,511	0.9	6,268,297	6,152,070	1.9

The total number of visits representing the 340 barometer attractions in Scotland for the period May 2003 was **1,786,771**. When compared to comparable data from the previous year of **1,771,511** visits, this shows a visits increase of **0.9%**. However, when the total visits figure for 2003 of **6,268,297** is compared with year 2002's total visits figure of **6,152,070**, performance for year 2003 shows a higher increase in visits of **1.9%**. A further breakdown is shown below, where the months of January-May 2003 can be compared with January-May 2002 with their % change calculations.

Attractions	Month	Visits	Month	Visits	% Change
340	Jan-03	716,092	Jan-02	690,428	3.7
	Feb-03	899,045	Feb-02	869,425	3.4
	Mar-03	1,071,063	Mar-02	1,216,866	-12.0
	Apr-03	1,795,326	Apr-02	1,603,840	11.9
	May-03	1,786,771	May-02	1,771,511	0.9

The highest increase in visits recorded by ATB area in May 2003 were experienced in the Shetland Islands (69.9%), the Western Isles (35.0%) and Dumfries & Galloway (25.7%). There are a number of reasons that can explain the increase of visit figures in May 2003, i.e. there were a number of attractions that opened earlier in May 2003 compared with last year and there has been increased investment in marketing to attract more visitors. AILLST showed the largest decrease in visits during the same period with a decline of -7.7%. Kingdom of Fife saw a decline in visits figures (-5.2%) with a total of 4,197 less visitors in May 2003. During the month of May 2003 the highest increases in visits were recorded by Church/Abbey/Cathedral attractions (18.2%), Distilleries (14.6%) and Industrial/Craft Premises (7.0%). The Castle category saw a decline in visits of -15.1%, followed by Historic Heritage Sites with -6.3% and the Historic House category experiencing a decrease of -3.9%.

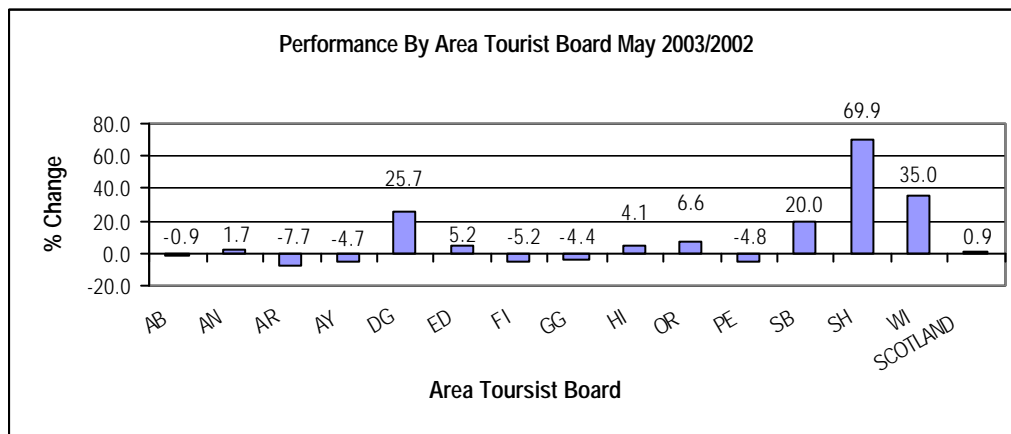
The greatest increases in visits were experienced by attractions located in Seaside areas (7.8%) followed by Urban areas (2.4%). The only decrease in visits figures took place in Rural areas where the visits figures declined by -2.4%. Attractions achieving volume of 1-19,999 visits experienced an increase of 2.4%. The Free admissions for the month of May 2003 experienced an increase of 7.4%, where the Paid admission attractions experienced a decline of -5.6% in the same period. The highest increases in visits by LEC area were experienced by attractions in Shetland (69.9%), Ross & Cromarty (50.5%) and the Western Isles (35.0%). Renfrewshire experienced the largest decrease in visits of -19.5%, followed by Lanarkshire with -13.2% and Inverness & Nairn with -12.0%.

3.0 PERFORMANCE BY AREA TOURIST BOARD

Performance by Area Tourist Board – May 2003/2002 and January-May 2003/2002

ATB Area	May-03	May-02	% Change	Jan-May03	Jan-May02	% Change
Aberdeen and Grampian (45)	185,355	187,051	-0.9	539,725	540,323	-0.1
Angus and City of Dundee (18)	65,864	64,771	1.7	260,222	236,136	10.2
ALLST (34)	198,070	214,605	-7.7	626,765	624,671	0.3
Ayrshire and Arran (13)	99,431	104,340	-4.7	257,587	248,171	3.8
Dumfries and Galloway (32)	69,200	55,051	25.7	177,850	146,471	21.4
Edinburgh and Lothian (33)	452,626	430,284	5.2	1,957,587	1,809,414	8.2
Kingdom of Fife (25)	75,944	80,141	-5.2	245,160	232,978	5.2
Greater Glasgow (35)	336,416	351,875	-4.4	1,405,010	1,521,086	-7.6
Highlands of Scotland (33)	133,945	128,641	4.1	357,379	417,684	-14.4
Orkney (13)	27,990	26,248	6.6	52,367	44,011	19.0
Perthshire (14)	63,127	66,282	-4.8	152,407	148,275	2.8
Scottish Borders (25)	59,147	49,286	20.0	196,513	150,333	30.7
Shetland Islands (13)	10,650	6,267	69.9	20,746	15,651	32.6
Western Isles (7)	9,006	6,669	35.0	18,979	16,866	12.5
SCOTLAND (340)	1,786,771	1,771,511	0.9	6,268,297	6,152,070	1.9

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



KEY

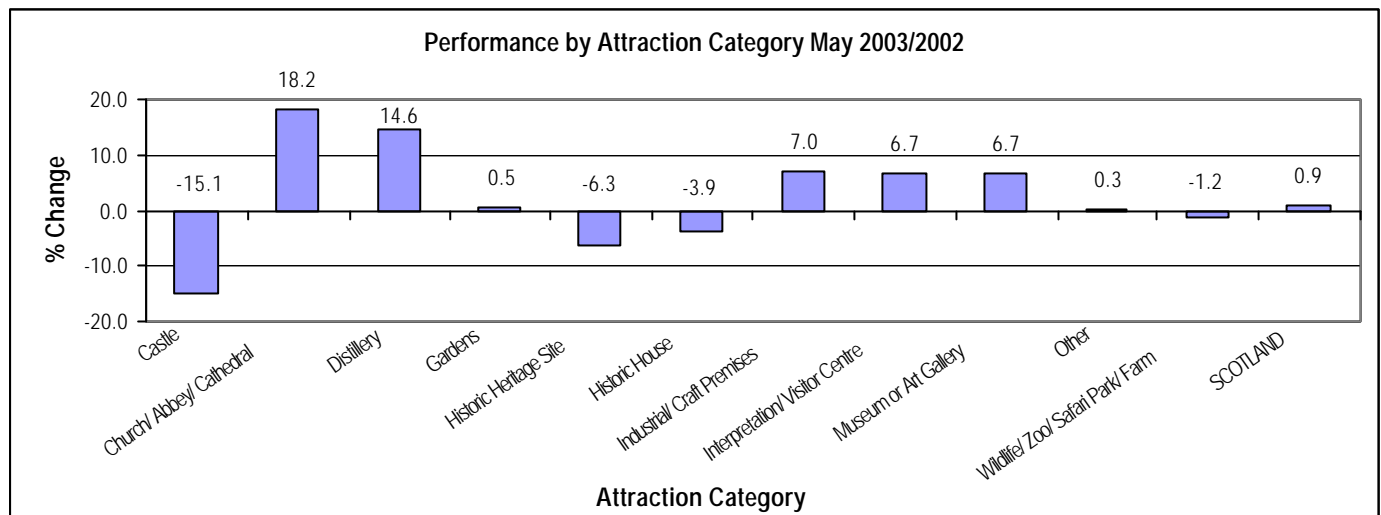
- AB Aberdeen & Grampian
- AN Angus & Dundee
- AR Argyll, Isles, Loch Lomond, Stirling & Trossachs
- AY Ayrshire & Arran
- DG Dumfries & Galloway
- ED Edinburgh & Lothians
- FI Kingdom of Fife
- GG Greater Glasgow & Clyde Valley
- HI Highlands of Scotland
- OR Orkney
- PE Perthshire
- SB Scottish Borders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

4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – May 2003/2002 and January-May 2003/2002

Attraction Category	May-03	May-02	% Change	Jan-May03	Jan-May02	% Change
Castle (51)	243,019	286,291	-15.1	780,487	792,172	-1.5
Church/ Abbey/ Cathedral (9)	18,938	16,028	18.2	45,071	40,299	11.8
Distillery (8)	23,801	20,763	14.6	53,845	50,120	7.4
Garden (24)	162,656	161,813	0.5	510,331	471,235	8.3
Historic Heritage Site (21)	39,795	42,467	-6.3	81,766	85,151	-4.0
Historic House (30)	94,897	98,774	-3.9	288,661	249,304	15.8
Industrial/ Craft Premises (10)	47,130	44,029	7.0	154,656	150,774	2.6
Interpretation/ Visitor Centre (53)	256,977	240,916	6.7	755,632	677,287	11.6
Museum or Art Gallery (98)	628,732	589,219	6.7	2,647,784	2,651,529	-0.1
Other (26)	188,160	187,553	0.3	623,026	682,539	-8.7
Wildlife/ Zoo/ Safari Park/ Farm (10)	82,666	83,658	-1.2	327,038	301,660	8.4
SCOTLAND (340)	1,786,771	1,771,511	0.9	6,268,297	6,152,070	1.9

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



5.0 PERFORMANCE BY LOCATION

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

Location Category	May-03	May-02	% Change	Jan-May03	Jan-May02	% Change
City (52)	868,342	852,748	1.8	3,709,949	3,647,630	1.7
Rural (154)	578,211	592,703	-2.4	1,530,823	1,514,306	1.1
Seaside (53)	107,506	99,687	7.8	298,729	275,925	8.3
Urban (81)	232,712	226,373	2.8	728,796	714,209	2.0
SCOTLAND (340)	1,786,771	1,771,511	0.9	6,268,297	6,152,070	1.9

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

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – May 2003/2002 and January-May 2003/2002

Range of Volume of Visits	May-03	May-02	% Change	Jan-May03	Jan-May02	% Change
1 - 19,999 (198)	206,868	202,085	2.4	504,491	467,090	8.0
20,000 - 49,999 (64)	248,285	243,974	1.8	687,899	640,071	7.5
50,000 + (78)	1,331,618	1,325,452	0.5	5,075,907	5,044,909	0.6
SCOTLAND (340)	1,786,771	1,771,511	0.9	6,268,297	6,152,070	1.9

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 – May 2003/2002 and January-May 2003/2002

Type	May-03	May-02	% Change	Jan-May03	Jan-May02	% Change
Free (135)	942,126	877,222	7.4	3,628,923	3,566,939	1.7
Paid (205)	844,645	894,289	-5.6	2,639,374	2,585,131	2.1
SCOTLAND (340)	1,786,771	1,771,511	0.9	6,268,297	6,152,070	1.9

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 – May 2003/2002 and January-May 2003/2002**

LEC Area	May-03	May-02	% Change	Jan-May03	Jan-May02	% Change
Argyll & The Islands (13)	40,678	37,196	9.4	90,514	78,835	14.8
Ayrshire (12)	92,997	100,301	-7.3	246,001	239,376	2.8
Borders (25)	59,147	49,286	20.0	196,513	150,333	30.7
Caithness & Sutherland (6)	8,947	9,049	-1.1	13,693	12,468	9.8
Dumfries & Galloway (32)	69,200	55,051	25.7	177,850	146,471	21.4
Dunbartonshire (3)*	25,285	27,500		97,895	114,567	
Edinburgh & Lothian (33)	452,626	430,284	5.2	1,957,587	1,809,414	8.2
Fife (25)	75,944	80,141	-5.2	245,160	232,978	5.2
Forth Valley (20)	158,367	174,009	-9.0	535,366	537,733	-0.4
Glasgow (18)	284,451	290,325	-2.0	1,197,429	1,302,941	-8.1
Grampian (30)	131,863	134,182	-1.7	380,524	378,023	0.7
Inverness & Nairn (9)	61,270	69,651	-12.0	193,289	264,194	-26.8
Lanarkshire (8)	15,036	17,317	-13.2	44,958	47,725	-5.8
Lochaber (6)	15,648	12,861	21.7	35,228	17,635	99.8
Moray, Badenoch & Strathspey (18)	74,060	72,320	2.4	230,190	257,576	-10.6
Orkney (13)	27,990	26,248	6.6	52,367	44,011	19.0
Renfrewshire (8)	17,374	21,571	-19.5	77,014	66,922	15.1
Ross & Cromarty (5)	21,337	14,175	50.5	29,227	18,836	55.2
Shetland (13)	10,650	6,267	69.9	20,746	15,651	32.6
Skye & Lochalsh (3)*	2,381	3,454		8,086	9,275	
Tayside (33)	132,514	133,654	-0.9	419,681	390,240	7.5
Western Isles (7)	9,006	6,669	35.0	18,979	16,866	12.5
SCOTLAND (340)	1,786,771	1,771,511	0.9	6,268,297	6,152,070	1.9

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 May 2003.

Reasons for positive impacts on visitor figures:-

There was an increase in visitors regardless of the war.

This year we opened on a free admission basis.

Free Stirling Weekend, where all the attractions in the city were free attracted a large number of locals as well as those from outside the city!

Good weather, wider advertising and signage and new website.

The exhibition we have on show at the moment is a bigger crowd puller than last year!

Increase in visitor figures due to more accurate counting, staff have been briefed on the importance of visitor figures.

Reasons for negative impacts in visitor figures:-

Transport is expensive for school children amongst a general decline.

There is a decrease in bookings although some are booking last minute due to the world situation.

Last year figures increased due to the Queen Mother's death, this year a general downturn due to the war etc.

Huge downturn on American visitors, we have been more reliant on home visitors.