

2002 SCOTTISH VISITOR ATTRACTION BAROMETER SEPTEMBER 2002 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 returns from a representative sample of 311 attractions. If you have any comments or suggestions on this report, please contact Margaret Graham (Tel: 0141 331 8406, Fax: 0141 331 8411, e-mail m.graham@gcal.ac.uk).

2.0 SEPTEMBER 2002/2001 AND JANUARY-SEPTEMBER 2002/2000

Summary

Year 2002 Barometer reporting applies a different methodology to address the unusual impacts on visitor flows experienced within the visitor attraction sector in 2001 as a result of the Foot and Mouth Disease (FMD) epidemic.

In line with previous barometers, visits figures for September 2002 are compared with those collected during the same period of the previous year, i.e. 2001. However, in order to address the unique positive/negative impacts brought about by FMD comparisons are also being made between visits figures recorded for 2002 and those recorded for the same period in 2000.

This Barometer is based on returns from 311 visitor attractions in Scotland. Some 290 attraction operators provided visitor figures for September, a response rate of 93%. The remaining 21 attractions were provided with an estimated visits figure. This 'missing' data will be replaced by actual visits figures when and if they become available. A total of 293 (94%) barometer participants had visits figures recorded that could be compared with data collected in year 2001 and 2000.

Where there are less than 4 respondents in any section, no comparative % change will be noted because of low sample and visitor numbers. This is indicated by an asterisk.

The following table shows total visits recorded for September 2002/2001/2000 and the period January-September 2000/2001/2002 as well as % change calculations.

Attractions	September 2002	September 2001	% Change	September 2002	September 2000	% Change
293	1,733,491	1,723,002	0.6	1,733,491	1,734,005	0.0
Attractions	Jan-Sept 2002	Jan-Sept 2001	% Change	Jan-Sept 2002	Jan-Sept 2000	% Change
293	14,645,128	14,412,176	1.6	14,645,128	14,760,363	-0.8

The total number of visits representing the **293** barometer attractions in Scotland for the period September 2002 was **1,733,491**. When compared to comparable data from the previous year of **1,723,002** visits, this shows an increase of **0.6%**. When the total visits figure for 2002 is compared with year 2000's total visits figure of **1,734,005**, performance for year 2002 remained stable. Visitor numbers increased by **1.6%** for the period January to September 2002 when 2002 visits figures are compared with those for 2001. However, when the same period in 2002 is compared with 2000 there is a slight decrease in visits of **-0.8**.

Free admission attractions, those welcoming 20,000 to 49,000 visits and those located on the coast experienced the greatest visit gains when visits for September 2002 are compared with those for September 2000. On the other hand paid admission attractions, those welcoming 50,000 or more visits and those located in towns experienced the greatest visit losses when visits for September 2002 are compared with those for September 2000. Increases in visitation during the same period to Wildlife/Zoo/Safari Park/Farm attractions, Historic Heritage Sites and Gardens was particularly marked.

In Table 3.2 the -10.5% decline in visits to Greater Glasgow and Clyde Valley during January-September 2002/2001 can be explained by the success of major popular choice temporary exhibitions that were held in Glasgow during 2001. However, when 2002 figures are compared with those of 2000, like Edinburgh Glasgow demonstrates only a marginal decline in visits. The regions showing visits increases of over 20% when visits for September 2002 and 2000 are compared include Orkney (26.1%), Dumfries and Galloway (23.8%), the Shetland Islands (20.1%). In contrast visitor attractions in the Western Isles (-29.7), and Ayrshire and Arran (-21.8) experienced a downturn in visits of more than 20%.

Fairs, events and good weather were repeatedly reported by operators as having positive impacts on visitation while fewer tourists and groups and building works contributed towards a decline in visits.

3 PERFORMANCE BY AREA TOURIST BOARD
3.1 Performance By Area Tourist Board: September 2002/2001 2002/2000

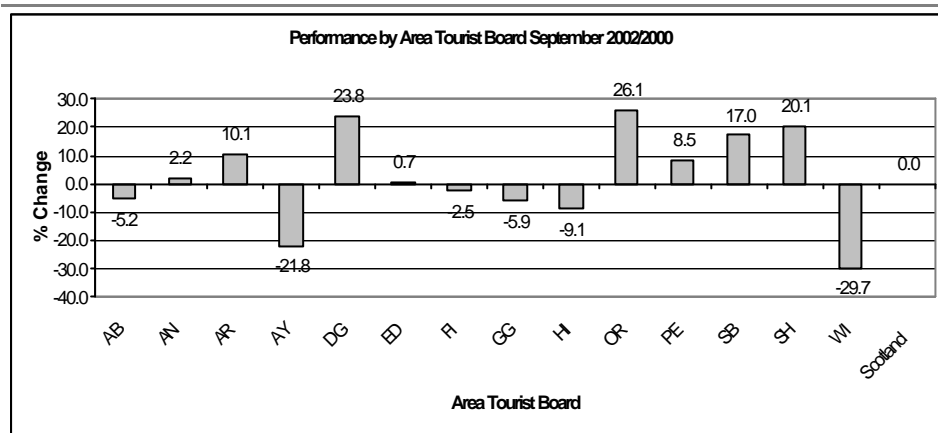
ATB Areas	Sept 2002	Sept 2001	% change on Month	Sept 2002	Sept 2000	% change on month
Aberdeen and Grampian (37)	163,816	168,260	-2.6	163,816	172,842	-5.2
Angus and City of Dundee (18)	66,945	63,029	6.2	66,945	65,512	2.2
AILLST (34)	279,297	265,400	5.2	279,297	253,678	10.1
Ayrshire and Arran (17)	90,208	75,612	19.3	90,208	115,368	-21.8
Dumfries and Galloway (25)	65,529	63,529	3.1	65,529	52,932	23.8
Edinburgh and Lothians (27)	417,329	401,903	3.8	417,329	414,379	0.7
Kingdom of Fife (21)	57,281	55,097	4.0	57,281	58,745	-2.5
Greater Glasgow and Clyde Valley (26)	253,055	305,403	-17.1	253,055	268,893	-5.9
Highlands of Scotland (21)	129,723	132,998	-2.5	129,723	142,665	-9.1
Orkney (14)	40,912	35,632	14.8	40,912	32,437	26.1
Perthshire (17)	101,549	91,836	10.6	101,549	93,627	8.5
Scottish Borders (18)	51,396	44,294	16.0	51,396	43,918	17.0
Shetland Islands (10)	7,449	6,277	18.7	7,449	6,200	20.1
Western Isles (8)	9,002	13,732	-34.4	9,002	12,809	-29.7
SCOTLAND (293)	1,733,491	1,723,002	0.6	1,733,491	1,734,005	0.0

3.2 Performance By Area Tourist Board: January- September 2002/2000 and 2002/2000

The table below provides a comparison of the cumulative changes in visits figures for January to September 2002, 2001 and 2000 for each of the 14 ATBs, and a % comparison year on year.

ATB Areas	Jan-Sept 2002	Jan-Sept 2001	% change on period	Jan-Sept 2002	Jan-Sept 2000	% change on period
Aberdeen and Grampian (37)	1,466,013	1,426,600	2.8	1,466,013	1,466,865	-0.1
Angus and City of Dundee (18)	604,091	617,588	-2.2	604,091	647,480	-6.7
AILLST (34)	2,192,249	2,052,352	6.8	2,192,249	2,117,524	3.5
Ayrshire and Arran (17)	855,308	794,884	7.6	855,308	888,360	-3.7
Dumfries and Galloway (25)	492,574	412,899	19.3	492,574	466,012	5.7
Edinburgh and Lothians (27)	3,600,226	3,527,788	2.1	3,600,226	3,603,950	-0.1
Kingdom of Fife (21)	445,351	453,036	-1.7	445,351	458,438	-2.9
Greater Glasgow and Clyde Valley (26)	2,471,682	2,760,189	-10.5	2,471,682	2,494,039	-0.9
Highlands of Scotland (21)	972,607	973,842	-0.1	972,607	1,100,014	-11.6
Orkney (14)	313,179	270,644	15.7	313,179	270,459	15.8
Perthshire (17)	688,044	650,886	5.7	688,044	725,259	-5.1
Scottish Borders (18)	381,771	287,958	32.6	381,771	348,054	9.7
Shetland Islands (10)	69,425	68,916	0.7	69,425	61,934	12.1
Western Isles (8)	92,608	114,594	-19.2	92,608	111,975	-17.3
SCOTLAND (293)	14,645,128	14,412,176	1.6	14,645,128	14,760,363	-0.8

The following chart provides a more visual image of trends that compare September 2002 with September 2000.



KEY

AB	Aberdeen & Grampian
AN	Angus & Dundee
AR	Argyll, Isles, L. 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

4.1 Performance by Attraction Category September 2002/2001 and 2002/2000.

Attraction Category	Sept 2002	Sept 2001	% change on month	Sept 2002	Sept 2000	% change on month
Castle (51)	370,330	351,066	5.5	370,330	368,534	0.5
Church/Abbey/Cathedral (19)	55,557	54,064	2.8	55,557	52,886	5.1
Distillery (12)	59,575	53,099	12.2	59,575	64,752	-8.0
Gardens (18)	114,816	111,488	3.0	114,816	97,579	17.7
Historic Heritage Site (12)	24,519	23,436	4.6	24,519	20,322	20.7
Historic House (33)	107,693	106,618	1.0	107,693	123,450	-12.8
Industrial/ Craft Premises (6)	19,252	19,687	-2.2	19,252	17,173	12.1
Interpretation/ Visitor Centre (49)	281,593	282,564	-0.3	281,593	304,841	-7.6
Museum or Art Gallery (66)	486,521	537,175	-9.4	486,521	509,923	-4.6
Other (14)	104,610	94,301	10.9	104,610	97,725	7.0
Wildlife/ Zoo/ Safari Park/ Farm (13)	109,025	89,504	21.8	109,025	76,820	41.9
Total (293)	1,733,491	1,723,002	0.6	1,733,491	1,734,005	0.0

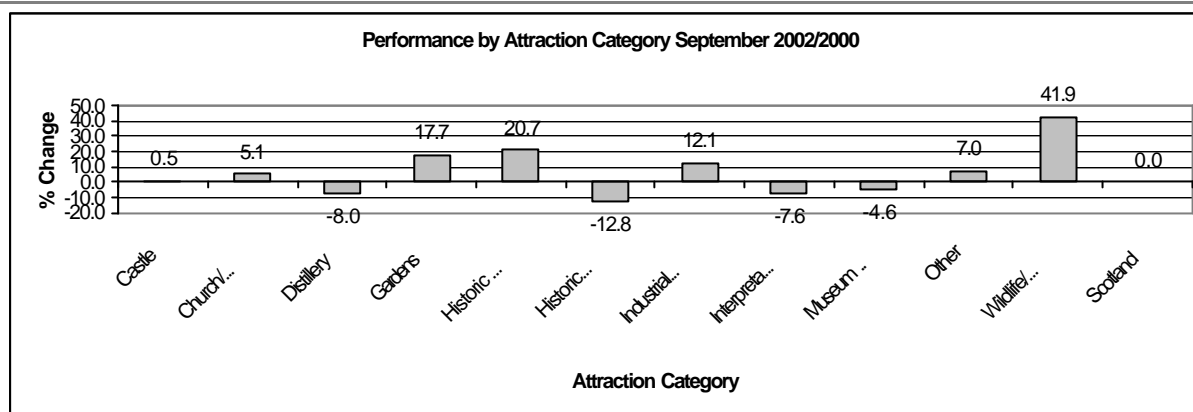
Note: Number in brackets indicates the number of visitor attractions per category.

4.2 Performance by Attraction Category January-September 2002/2001 and 2002/2000.

Attraction Category	Jan-Sept 2002	Jan-Sept 2001	% change on period	Jan-Sept 2002	Jan-Sept 2000	% change on period
Castle (51)	2,769,918	2,591,194	6.9	2,769,918	2,884,365	-4.0
Church/Abbey/Cathedral (19)	381,246	364,726	4.5	381,246	385,562	-1.1
Distillery (12)	444,625	412,459	7.8	444,625	477,198	-6.8
Gardens (18)	1,057,947	1,030,336	2.7	1,057,947	1,023,501	3.4
Historic Heritage Site (12)	184,459	186,449	-1.1	184,459	185,708	-0.7
Historic House (33)	853,003	799,858	6.6	853,003	889,179	-4.1
Industrial/ Craft Premises (6)	134,901	131,940	2.2	134,901	136,682	-1.3
Interpretation/ Visitor Centre (49)	2,325,710	2,293,896	1.4	2,325,710	2,437,929	-4.6
Museum or Art Gallery (66)	4,720,841	5,052,063	-6.6	4,720,841	4,753,045	-0.7
Other (14)	834,853	785,220	6.3	834,853	795,457	5.0
Wildlife/ Zoo/ Safari Park/ Farm (13)	937,625	764,035	22.7	937,625	791,737	18.4
Total (293)	14,645,128	14,412,176	1.6	14,645,128	14,760,363	-0.8

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

The following chart shows September 2002 against September 2000.



5.0 PERFORMANCE BY LOCATION

5.1 Performance By Location September 2002/2001 and 2002/2000

Location Category	September 2002	September 2001	% change on month	September 2002	September 2000	% change month
City (44)	797,176	817,152	-2.4	797,176	811,361	-1.7
Rural (132)	553,841	507,218	9.2	553,841	538,934	2.8
Seaside (55)	131,004	124,782	5.0	131,004	116,736	12.2
Town (62)	251,470	273,850	-8.2	251,470	266,974	-5.8
Total (293)	1,733,491	1,723,002	0.6	1,733,491	1,734,005	0.0

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

5.2 Performance By Location January-August 2002/2001 and 2002/2000

Location Category	Jan-Sept 2002	Jan-Sept 2001	% change on period	Jan-Sept 2002	Jan-Sept 2000	% change on period
City (44)	7,101,400	7,395,245	-4.0	7,101,400	7,256,550	-2.1
Rural (132)	4,414,392	3,916,391	12.7	4,414,392	4,359,337	1.3
Seaside (55)	1,027,854	1,017,586	1.0	1,027,854	1,013,072	1.5
Town (62)	2,101,482	2,082,954	0.9	2,101,482	2,131,404	-1.4
Total (293)	14,645,128	14,412,176	1.6	14,645,128	14,760,363	-0.8

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

6.0 PERFORMANCE BY VOLUME OF VISITOR NUMBERS

6.1 Performance by Volume of Visits September 2002/2001 and 2002/2000

Volume of visitors per year	September 2002	September 2001	% change on month	September 2002	September 2000	% change on month
Under 20,000 visits (142)	173,992	168,303	3.4	173,992	166,460	4.5
20,000-49,000 visits (70)	263,977	239,187	10.4	263,977	244,240	8.1
50,000 visits and over visits (81)	1,295,522	1,315,512	-1.5	1,295,522	1,323,305	-2.1
Total (293)	1,733,491	1,723,002	0.6	1,733,491	1,734,005	0.0

Note: Number in brackets indicates the number of attractions recording comparable data.

6.2 Performance by Volume of Visits January- September 2002/2000 and 2002/2000

Volume of visitors per year	Jan- Sept 2002	Jan-Sept 2001	% change on period	Jan-Sept 2002	Jan-Sept 2000	% change on period
Under 20,000 visits (142)	1,274,100	1,187,506	7.3	1,274,100	1,288,488	-1.1
20,000-49,000 visits (70)	2,098,460	1,850,767	13.4	2,098,460	2,057,249	2.0
50,000 visits and over visits (81)	11,272,568	11,373,903	-0.9	11,272,568	11,414,626	-1.2
Total (293)	14,645,128	14,412,176	1.6	14,645,128	14,760,363	-0.8

Note: Number in brackets indicates the number of attractions recording comparable data.

7.0 PERFORMANCE BY ADMISSION TYPE
7.1 Performance by Admission Type September 2002/2001 and 2002/2000

Type	September 2002	September 2001	% change on month	September 2002	September 2000	% change on month
Free Admission Attractions (119)	906,457	930,059	-2.5	906,457	871,436	4.0
Paid Admission Attractions (174)	827,034	792,943	4.3	827,034	862,569	-4.1
Total (293)	1,733,491	1,723,002	0.6	1,733,491	1,734,005	0.0

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

7.2 Performance by Admission Type January-September 2002/2001 and 2002/2000

Type	Jan- Sept 2002	Jan-Sept 2001	% change on period	Jan-Sept 2002	Jan-Sept 2000	% change on period
Free Admission Attractions (119)	8,189,369	8,266,936	-0.9	8,189,369	7,982,808	2.6
Paid Admission Attractions (174)	6,455,759	6,145,240	5.1	6,455,759	6,777,555	-4.7
Total (293)	14,645,128	14,412,176	1.6	14,645,128	14,760,363	-0.8

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

8.0 PERFORMANCE BY LOCAL ENTERPRISE COMPANY (LEC) AREA
8.1 Performance by LEC area September 2002/2001 and 2002/2000

LEC Area	September 2002	September 2001	% change on period	September 2002	September 2000	% change on month
Argyll & the Islands (13)	55,294	54,937	0.6	55,294	48,283	14.5
Ayrshire (15)	80,908	65,625	23.3	80,908	106,258	-23.9
Borders (18)	51,396	44,294	16.0	51,396	43,918	17.0
Caithness & Sutherland (3)*	8,000	7,380		8,000	7,956	
Dumfries & Galloway (25)	65,529	63,529	3.1	65,529	52,932	23.8
Dunbartonshire (2)*	5,977	5,893		5,977	5,681	
Edinburgh & Lothian (27)	417,329	401,903	3.8	417,329	414,379	0.7
Fife (21)	57,281	55,097	4.0	57,281	58,745	-2.5
Forth Valley (20)	224,267	211,656	6.0	224,267	206,426	8.6
Glasgow (14)	231,537	275,126	-15.8	231,537	239,013	-3.1
Grampian (25)	103,113	98,995	4.2	103,113	108,942	-5.4
Inverness & Nairn (7)	64,789	63,989	1.3	64,789	75,031	-13.7
Lanarkshire (5)	7,559	10,705	-29.4	7,559	8,792	-14.0
Lochaber (3)*	15,278	21,495		15,278	20,925	
Moray, Badenoch & Strathspey (13)	71,054	78,330	-9.3	71,054	71,354	-0.4
Orkney (14)	40,912	35,632	14.8	40,912	32,437	26.1
Renfrewshire (7)	13,959	19,572	-28.7	13,959	21,088	-33.8
Ross & Cromarty (4)	13,945	14,784	-5.7	13,945	14,255	-2.2
Shetland (10)	7,449	6,277	18.7	7,449	6,200	20.1
Skye & Lochalsh (3)*	17,360	16,285		17,360	17,044	
Tayside (36)	171,553	157,766	8.7	171,553	161,537	6.2
Western Isles (8)	9,002	13,732	-34.4	9,002	12,809	-29.7
Total (293)	1,733,491	1,723,002	0.6	1,733,491	1,734,005	0.0

Note: Number in brackets indicates the number of attractions providing comparable data

8.2 Performance by LEC area January-September 2002/2001 and 2002/2000

LEC Area	Jan-Sept 2002	Jan- Sept 2001	% change on period	Jan- Sept 2002	Jan- Sept 2000	% change on period
Argyll & the Islands (13)	373,910	358,351	4.3	373,910	357,629	4.6
Ayrshire (15)	788,825	730,466	8.0	788,825	820,402	-3.8
Borders (18)	381,771	287,958	32.6	381,771	348,054	9.7
Caithness & Sutherland (3)*	57,955	54,167		57,955	63,621	
Dumfries & Galloway (25)	492,574	412,899	19.3	492,574	466,012	5.7
Dunbartonshire (2)*	41,894	41,573		41,894	38,786	
Edinburgh & Lothian (27)	3,600,226	3,527,788	2.1	3,600,226	3,603,950	-0.1
Fife (21)	445,351	453,036	-1.7	445,351	458,438	-2.9
Forth Valley (20)	1,822,880	1,698,653	7.3	1,822,880	1,771,508	2.9
Glasgow (14)	2,247,932	2,522,628	-10.9	2,247,932	2,242,218	0.3
Grampian (25)	985,007	973,961	1.1	985,007	1,000,729	-1.6
Inverness & Nairn (7)	504,716	474,310	6.4	504,716	551,928	-8.6
Lanarkshire (5)	107,163	104,845	2.2	107,163	101,640	5.4
Lochaber (3)*	70,438	137,456		70,438	150,516	
Moray, Badenoch & Strathspey (13)	585,352	536,357	9.1	585,352	549,486	6.5
Orkney (14)	313,179	270,644	15.7	313,179	270,459	15.8
Renfrewshire (7)	116,587	132,716	-12.2	116,587	150,181	-22.4
Ross & Cromarty (4)	101,014	102,933	-1.9	101,014	114,510	-11.8
Shetland (10)	69,425	68,916	0.7	69,425	61,934	12.1
Skye & Lochalsh (3)*	134,138	121,258		134,138	136,089	
Tayside (36)	1,312,183	1,286,667	2.0	1,312,183	1,390,298	-5.6
Western Isles (8)	92,608	114,594	-19.2	92,608	111,975	-17.3
Total (293)	14,645,128	14,412,176	1.6	14,645,128	14,760,363	-0.8

Note: Number in brackets indicates the number of attractions providing comparable data

9.0 **COMMENTS**

The following has been drawn from comments made by operators to help epitomise the reasons that have impacted on performance during September 2002.

Reasons for positive impacts on visit figures:

Good weather ensured that numbers were good.

More than 11,000 of our visitors visited a fair on the first weekend of the month.

During September we held a Fair. This is our best ever September.

The following quotes were provided by operators to justify visit increases:

I suspect that the number of tourists is still falling

North American visitors down 50%

Major external building works and fewer groups have both contributed towards fewer visitors