

2003 SCOTTISH VISITOR ATTRACTION BAROMETER September 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 406 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 SEPTEMBER 2003/2002 AND JANUARY – SEPTEMBER 2003/2002

Summary

This Barometer compares the period of September 2003 with September 2002. It is based on contacting 406 visitor attractions in Scotland. Some 380 attraction operators provided figures for the month of September 2003, a response rate of 94%. 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 September 2003/2002 and Jan-September 2003/2002 as well as the % change calculation.

Attractions	Sep-03	Sep-02	% Change	Jan-Sep03	Jan-Sep02	% Change
380	1,793,299	1,874,092	-4.3	16,135,630	15,723,109	2.6

The total number of visits representing the 380 barometer attractions in Scotland for the period September 2003 was **1,793,299**. When compared to comparable data from the previous year of **1,874,092** visits, this shows a visits decrease of **-4.3%**. When the total visits figure for 2003 of **16,135,630** is compared with year 2002's total visits figure of **15,723,109**, performance for year 2003 shows an increase in visits of **2.6%**. A further breakdown is shown below, where the months of January- September 2003 can be compared with January-September 2002 with their % change calculations.

Attractions	Month	Visits	Month	Visits	% Change
380	Jan-03	688,286	Jan-02	651,473	5.7
	Feb-03	878,955	Feb-02	842,392	4.3
	Mar-03	1,053,991	Mar-02	1,186,472	-11.2
	Apr-03	1,806,228	Apr-02	1,591,924	13.5
	May-03	1,813,643	May-02	1,780,664	1.9
	Jun-03	2,134,202	Jun-02	2,161,342	-1.3
	Jul-03	2,745,884	Jul-02	2,646,599	3.8
	Aug-03	3,221,142	Aug-02	2,988,151	7.8
	Sep-03	1,793,299	Sep-02	1,874,092	-4.3

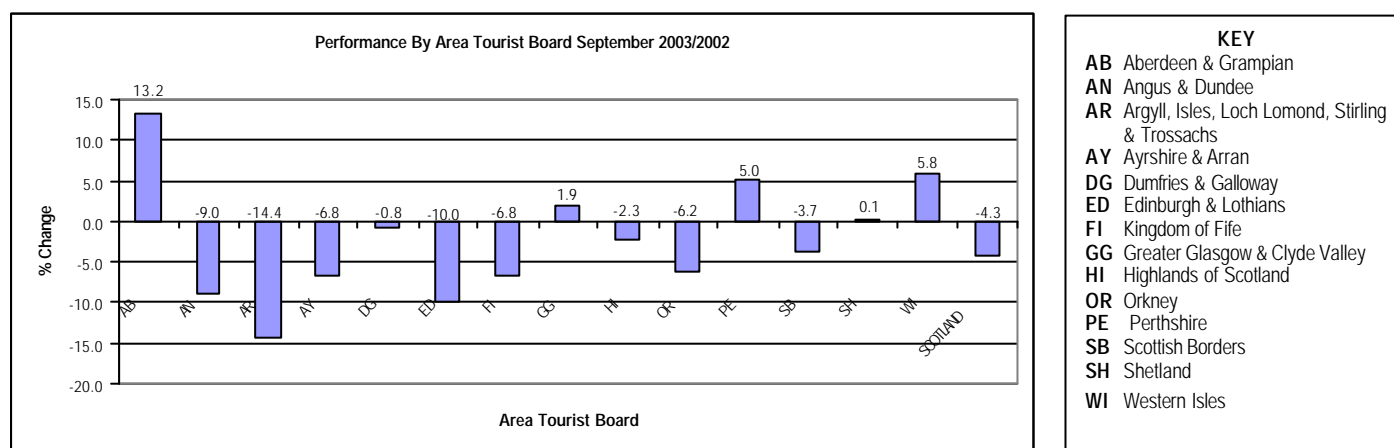
The highest increases in visits recorded by ATB area in September were experienced in the Aberdeen and Grampian (13.2%), the Western Isles (5.8%) and Perthshire (5.0%). AILLST showed the largest decrease in visits during the same period with a decline of -14.4%. Edinburgh and Lothian saw a decline on visit figures (-10.0%) with a total of 49,742 less visitors in September 2003. The decline in Edinburgh and Lothian may have been due to the official ending of the Festivals. The highest increases in visits were recorded by Distilleries (15.0%), Gardens (9.2%) and the Historic House category (2.1%). The Historic Heritage Site category saw a decline in visits of 21.8%, followed by the Wildlife/Zoo/Safari Park/Farm category with -15.7% and the Castle category experiencing a decrease of -15.2%. In the month of September no increases were experienced by attractions in the location category. However, the highest decrease in visits were in the Seaside area where the visit figures declined by -5.3%, followed by the City with a decrease of -5.0%. Attractions achieving volume of 1-19,999 visits experienced a slight increase of 1.0%, while the heaviest losses were experienced by attractions with 50,000+ or more visits (-5.4%). The Free admissions experienced an increase in visits of 1.3%, whereas Paid attractions decreased by -9.4%. The highest increases in visits by LEC area were experienced by attractions in Grampian (22.1%), Glasgow (7.4%) and the Western Isles (5.8%). Renfrewshire experienced the largest decrease in visits of -19.5%, followed by Skye & Lochalsh decreased with -16.8% and Lochaber (-16.5%).

3.0 PERFORMANCE BY AREA TOURIST BOARD

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

ATB Area	Sep-03	Sep-02	% Change	Jan-Sep03	Jan-Sep02	% Change
Aberdeen and Grampian (53)	189,737	167,550	13.2	1,585,359	1,476,428	7.4
Angus and City of Dundee (19)	61,153	67,200	-9.0	580,108	556,285	4.3
AILLST (41)	226,191	264,156	-14.4	1,927,519	1,960,025	-1.7
Ayrshire and Arran (15)	83,061	89,080	-6.8	816,232	770,224	6.0
Dumfries and Galloway (34)	62,493	62,988	-0.8	562,396	514,404	9.3
Edinburgh and Lothian (37)	449,315	499,057	-10.0	4,545,343	4,361,171	4.2
Kingdom of Fife (24)	61,233	65,704	-6.8	517,383	512,855	0.9
Greater Glasgow (42)	273,368	268,277	1.9	2,466,528	2,586,064	-4.6
Highlands of Scotland (35)	167,366	171,349	-2.3	1,348,904	1,340,105	0.7
Orkney (15)	39,892	42,533	-6.2	344,282	327,120	5.2
Perthshire (18)	104,580	99,572	5.0	761,304	724,415	5.1
Scottish Borders (27)	57,970	60,223	-3.7	502,295	431,799	16.3
Shetland Islands (13)	7,340	7,332	0.1	80,198	71,236	12.6
Western Isles (7)	9,600	9,071	5.8	97,779	90,978	7.5
SCOTLAND (380)	1,793,299	1,874,092	-4.3	16,135,630	15,723,109	2.6

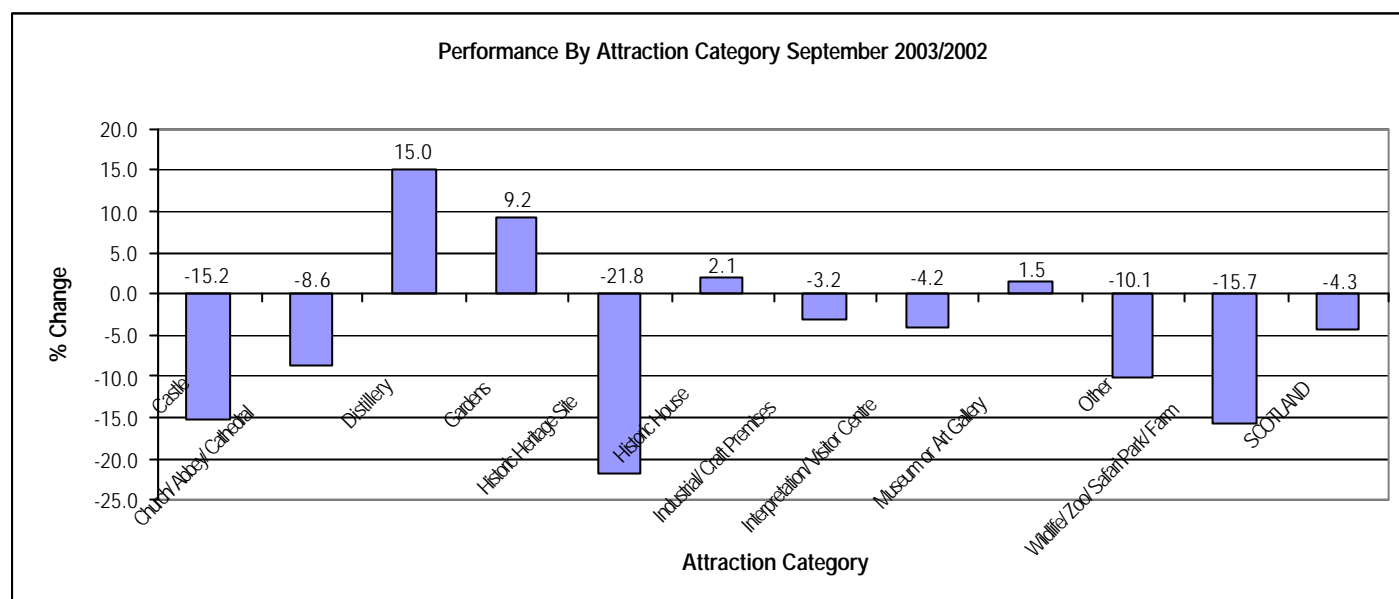
Note: Number in brackets indicates the number of visitor attractions per ATB.


4.0 PERFORMANCE BY ATTRACTION CATEGORY

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

Attraction category	Sep-03	Sep-02	% Change	Jan-Sep03	Jan-Sep02	% Change
Castle (52)	298,884	352,292	-15.2	2,657,959	2,595,583	2.4
Church/ Abbey/ Cathedral (10)	21,308	23,304	-8.6	195,594	184,945	5.8
Distillery (15)	58,121	50,528	15.0	373,875	341,894	9.4
Gardens (24)	131,413	120,381	9.2	1,261,774	1,102,053	14.5
Historic Heritage Site (21)	33,384	42,702	-21.8	369,008	359,617	2.6
Historic House (32)	118,304	115,923	2.1	937,649	895,365	4.7
Industrial/ Craft Premises (11)	45,773	47,284	-3.2	349,237	352,848	-1.0
Interpretation/ Visitor Centre (59)	274,808	286,763	-4.2	2,257,775	2,178,245	3.7
Museum or Art Gallery (118)	568,627	560,279	1.5	5,333,825	5,374,694	-0.8
Other (27)	179,262	199,449	-10.1	1,550,874	1,543,522	0.5
Wildlife/ Zoo/ Safari Park/ Farm (11)	63,415	75,187	-15.7	848,060	794,343	6.8
SCOTLAND (380)	1,793,299	1,874,092	-4.3	16,135,630	15,723,109	2.6

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



5.0 PERFORMANCE BY LOCATION

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

Location Category	Sep-03	Sep-02	% Change	Jan-Sep03	Jan-Sep02	% Change
City (59)	814,452	857,706	-5.0	7,792,442	7,665,724	1.7
Rural (168)	598,072	618,885	-3.4	5,040,141	4,815,146	4.7
Seaside (52)	102,288	108,025	-5.3	936,278	854,044	9.6
Urban (101)	278,487	289,476	-3.8	2,366,769	2,388,195	-0.9
SCOTLAND (380)	1,793,299	1,874,092	-4.3	16,135,630	15,723,109	2.6

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

6.0 PERFORMANCE BY VOLUME OF VISITS

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

Range of Volume of Visits	Sep-03	Sep-02	% Change	Jan-Sep03	Jan-Sep02	% Change
1 - 19,999 (227)	235,702	233,270	1.0	1,948,282	1,755,409	11.0
20,000 - 49,999 (68)	233,512	240,698	-3.0	2,095,723	1,982,296	5.7
50,000 + (85)	1,324,085	1,400,124	-5.4	12,091,625	11,985,404	0.9
SCOTLAND (380)	1,793,299	1,874,092	-4.3	16,135,630	15,723,109	2.6

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 – September 2003/2002 and January- September 2003/2002

Type	Sep-03	Sep-02	% Change	Jan-Sep03	Jan-Sep02	% Change
Free (163)	903,704	891,669	1.3	7,993,467	7,740,020	3.3
Paid (217)	889,595	982,423	-9.4	8,142,163	7,983,089	2.0
SCOTLAND (380)	1,793,299	1,874,092	-4.3	16,135,630	15,723,109	2.6

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

LEC Area	Sep-03	Sep-02	% Change	Jan-Sep03	Jan-Sep02	% Change
Argyll & The Islands (15)	51,436	57,226	-10.1	434,692	413,929	5.0
Ayrshire (14)	79,024	84,982	-7.0	778,072	737,815	5.5
Borders (27)	57,970	60,223	-3.7	502,295	431,799	16.3
Caithness & Sutherland (7)	10,452	10,378	0.7	86,790	73,425	18.2
Dumfries & Galloway (34)	62,493	62,988	-0.8	562,396	514,404	9.3
Dunbartonshire (3) *	31,221	37,662		220,464	257,448	
Edinburgh & Lothian (37)	449,315	499,057	-10.0	4,545,343	4,361,171	4.2
Fife (24)	61,233	65,704	-6.8	517,383	512,855	0.9
Forth Valley (24)	170,480	201,992	-15.6	1,467,115	1,516,563	-3.3
Glasgow (21)	215,229	200,340	7.4	1,962,200	2,065,607	-5.0
Grampian (39)	133,933	109,675	22.1	1,163,147	1,044,585	11.4
Inverness & Nairn (8)	87,851	85,216	3.1	671,214	722,553	-7.1
Lanarkshire (12)	20,946	22,031	-4.9	207,374	200,353	3.5
Lochaber (7)	32,849	39,335	-16.5	279,681	247,772	12.9
Moray, Badenoch & Strathspey (17)	70,494	72,481	-2.7	562,915	570,625	-1.4
Orkney (15)	39,892	42,533	-6.2	344,282	327,120	5.2
Renfrewshire (8)	11,448	14,221	-19.5	116,982	104,550	11.9
Ross & Cromarty (7)	18,119	17,793	1.8	143,137	125,102	14.4
Shetland (13)	7,340	7,332	0.1	80,198	71,236	12.6
Skye & Lochalsh (4)	3,437	4,131	-16.8	27,767	32,923	-15.7
Tayside (37)	168,537	169,721	-0.7	1,364,404	1,300,296	4.9
Western Isles (7)	9,600	9,071	5.8	97,779	90,978	7.5
SCOTLAND (380)	1,793,299	1,874,092	-4.3	16,135,630	15,723,109	2.6

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 September 2003.

Reasons for positive impacts on visitor figures:-

The whole year has been up month on month, so perhaps it could be related to the excellent weather this year.

Good weather, expanded opening hours, improved advertising and signage, more promotional concessions.

The fine weather this summer encouraged people to take further holiday breaks in September.

More displays in September 2003 which have encouraged more visitors into the museum.

September proved to be a very good month, trading with a good number of tourists in the area.

Introduction of free admission.

Increasing numbers of visitors from Ryan Air destinations from/to Prestwick.

Reasons for negative impacts in visitor figures:-

Figures were considerably down on the same month last year mainly due to the hot weather.

We are surprised at the low attendance for this month; however we did note a dramatic drop in attendance after the official end to the festivals period.

Found September a disappointing month for the museum venues, patterns did not follow previous years pattern – no obvious reason!

Loss of coach parties and visitors have to be shared with an abundance of museums.