

## 2005 SCOTTISH VISITOR ATTRACTION BAROMETER January - April 2005 REPORT

Commissioned by VisitScotland

Conducted by the Moffat Centre for Travel and Tourism Business Development,  
Division of Management, Glasgow Caledonian University



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. If you have any comments or suggestions, please contact Marina Martinolli (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: mma4@gcal.ac.uk).

This Barometer compares the period of January-April 2005 with January-April 2004. Some 507 attraction operators provided figures for the months of January-April 2005 with 472 attractions providing comparable visits figures. The visitor figures recorded can be compared with data collected in year 2004.

### 2.0 JANUARY-APRIL 2005/2004

#### Summary

The total number of visits for the responding 472 barometer attractions in Scotland for the period January-April 2005 was **7,154,990**. When compared to data from the previous year of **6,859,981** visits, this shows a visits increase of **4.3%**.

The following table shows total visits recorded for January-April 2004/2003 as well as the % change calculation.

Attractions	Jan-Apr05	Jan-Apr04	% Change
472	7,154,990	6,859,981	4.3

A further breakdown is shown below, where the visits during the months of January-April 2005 can be compared with January-April 2004 with their % change calculations. According to participating attractions, the increase of 27% from March 2004 to March 2005 has been attributed to the early Easter.

Attractions	Month	Visits	Month	Visits	% Change
472	Jan-05	1,311,283	Jan-04	1,129,734	16.1
	Feb-05	1,461,929	Feb-04	1,444,621	1.2
	Mar-05	2,055,618	Mar-04	1,618,719	27.0
	Apr-05	2,326,160	Apr-04	2,666,907	-12.8

The highest increases in visits recorded by Region in January-April 2005 were experienced in the Scottish Borders (28.7%) and Ayrshire & Arran (21.4%). The Shetland Islands showed the largest decreases in visits during the same period with a decline of -29.9%. Orkney also saw a decline in visits figures (-25.1%).

During this early season period the highest increases in visits were recorded by the Distillery category (14.8%), Country Park/ Forest Park category (14.4%) and the Historic House attractions (8.6%). The Historic Heritage Site category saw a decline in visits of -19.1%, followed by the Church/ Abbey/ Cathedral category with -10.4%.

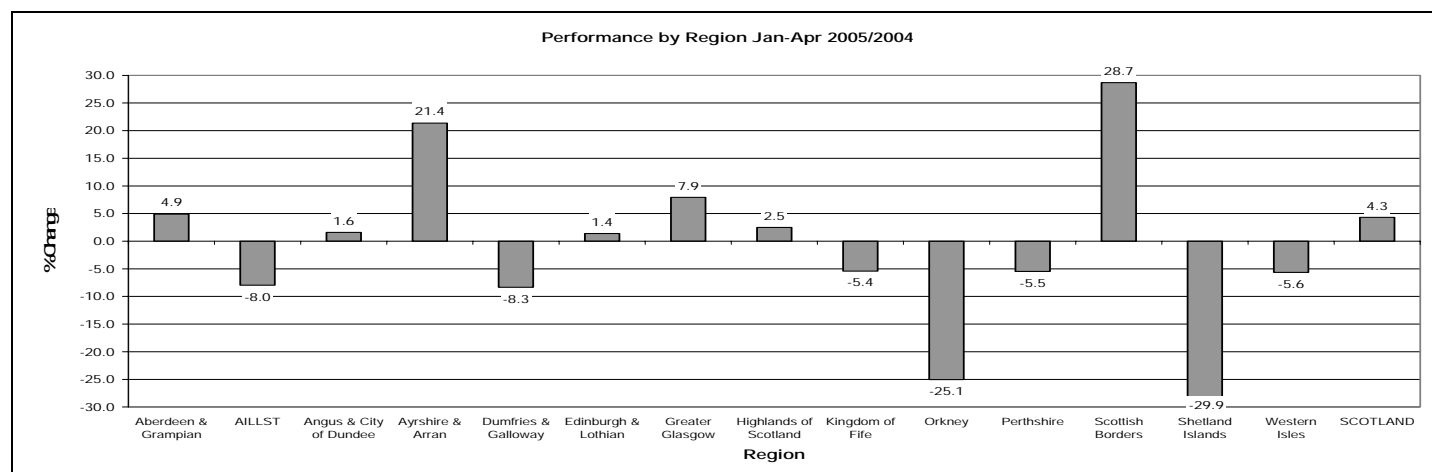
The greatest increases in visits were experienced by attractions located in Rural areas (11.5%), followed by Seaside areas (0.2%), the decrease in visits figures took place in Urban areas where there was a decrease of -0.6%. The attractions that welcomed over 50,000 visits saw the largest increase of 4.9%, followed by attractions welcoming under 19,999 visits (2.7%), whereas attractions in the 20,000-49,999 range showed a decrease of -2.7%. Free admissions experienced an increase of 5.3% in visits, whereas Paid attractions saw a smaller increase of 1.4% when comparing January-April 2005 with January-April 2004. The highest increases in visits by LEC area were experienced by attractions in Borders (28.7%), Caithness & Sutherland (27.8%) and Skye & Lochalsh (23.6%), whereas Shetland; Orkney and Lochaber experienced decreases in visits of -29.9%; -25.1% and -15.1% respectively.

**3.0 PERFORMANCE BY REGION**

Performance by Region – March 2005/2004; April 2005/2004 and January-April 2005/2004

Region	Mar-05	Mar-04	% Change	Apr-05	Apr-04	% Change	Jan-Apr05	Jan-Apr04	% Change
Aberdeen & Grampian (60)	117,378	95,892	22.4	162,196	160,971	0.8	422,702	402,956	4.9
ALLST (49)	142,734	110,368	29.3	174,830	231,048	-24.3	446,426	485,012	-8.0
Angus & City of Dundee (25)	68,352	60,235	13.5	83,735	89,717	-6.7	255,357	251,310	1.6
Ayrshire & Arran (17)	46,933	23,831	96.9	70,834	73,714	-3.9	171,444	141,246	21.4
Dumfries & Galloway (35)	34,572	23,817	45.2	67,373	87,766	-23.2	127,287	138,844	-8.3
Edinburgh & Lothian (57)	500,823	399,494	25.4	562,046	609,071	-7.7	1,724,483	1,700,906	1.4
Greater Glasgow (50)	936,945	773,559	21.1	872,189	1,030,230	-15.3	3,275,864	3,034,810	7.9
Highlands of Scotland (59)	81,832	55,429	47.6	140,108	151,709	-7.6	297,928	290,668	2.5
Kingdom of Fife (30)	44,179	37,298	18.4	57,949	74,463	-22.2	154,979	163,848	-5.4
Orkney (14)	4,463	3,477	28.4	11,907	18,038	-34.0	18,016	24,039	-25.1
Perthshire (20)	20,742	7,048	194.3	42,676	60,186	-29.1	70,070	74,127	-5.5
Scottish Borders (35)	53,851	25,981	107.3	73,724	71,453	3.2	178,158	138,442	28.7
Shetland Islands (14)	213	230	-7.4	1,792	2,650	-32.4	2,085	2,974	-29.9
Western Isles (7)	2,601	2,060	26.3	4,801	5,891	-18.5	10,191	10,799	-5.6
<b>SCOTLAND (472)</b>	<b>2,055,618</b>	<b>1,618,719</b>	<b>27.0</b>	<b>2,326,160</b>	<b>2,666,907</b>	<b>-12.8</b>	<b>7,154,990</b>	<b>6,859,981</b>	<b>4.3</b>

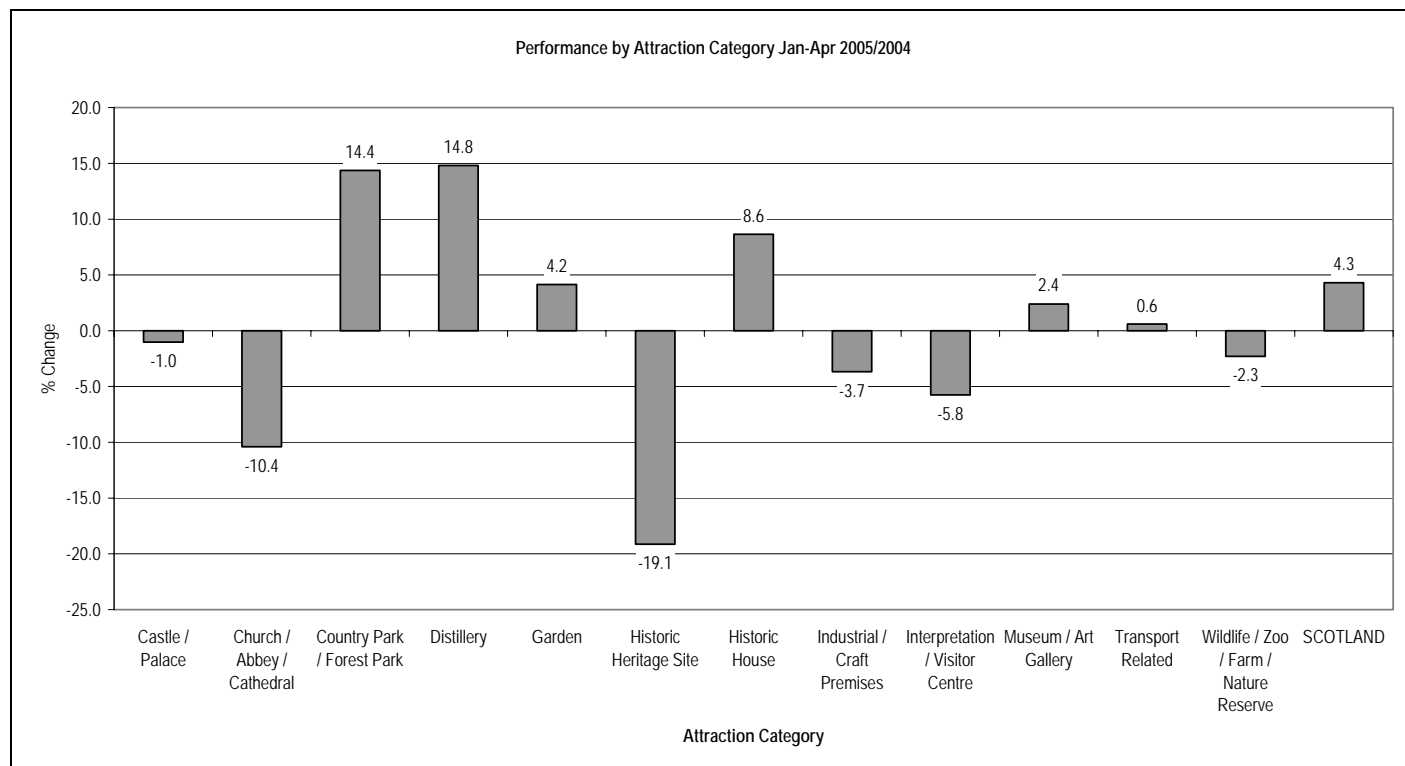
Note: Number in brackets indicates the number of visitor attractions per region.


**4.0 PERFORMANCE BY ATTRACTION CATEGORY**

Performance by Attraction Category – March 2005/2004; April 2005/2004 and January-April 2005/2004

Category	Mar-05	Mar-04	% Change	Apr-05	Apr-04	% Change	Jan-Apr05	Jan-Apr04	% Change
Castle / Palace (64)	175,717	118,371	48.4	280,952	337,908	-16.9	604,838	611,093	-1.0
Church / Abbey / Cathedral (17)	43,532	40,339	7.9	54,942	71,950	-23.6	152,620	170,319	-10.4
Country Park / Forest Park (10)	671,423	506,776	32.5	609,662	723,591	-15.7	2,374,138	2,075,954	14.4
Distillery (21)	13,275	10,685	24.2	30,981	25,907	19.6	54,391	47,373	14.8
Garden (30)	95,788	81,264	17.9	141,007	144,711	-2.6	359,809	345,452	4.2
Historic Heritage Site (34)	22,392	16,420	36.4	36,601	56,848	-35.6	76,894	95,087	-19.1
Historic House (32)	40,351	29,648	36.1	68,226	71,038	-4.0	148,322	136,529	8.6
Industrial / Craft Premises (11)	30,897	30,684	0.7	28,507	33,335	-14.5	100,738	104,573	-3.7
Interpretation / Visitor Centre (79)	216,123	171,731	25.8	273,324	342,148	-20.1	717,012	760,762	-5.8
Museum / Art Gallery (148)	691,538	577,383	19.8	721,917	759,614	-5.0	2,370,891	2,315,534	2.4
Transport Related (9)	24,919	15,724	58.5	32,061	39,275	-18.4	89,044	88,513	0.6
Wildlife / Zoo / Farm / Nature Reserve (17)	29,663	19,694	50.6	47,980	60,582	-20.8	106,293	108,792	-2.3
<b>SCOTLAND (472)</b>	<b>2,055,618</b>	<b>1,618,719</b>	<b>27.0</b>	<b>2,326,160</b>	<b>2,666,907</b>	<b>-12.8</b>	<b>7,154,990</b>	<b>6,859,981</b>	<b>4.3</b>

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



## 5.0 PERFORMANCE BY LOCATION

### Performance by Location – March 2005/2004; April 2005/2004 and January-April 2005/2004

Location	Mar-05	Mar-04	% Change	Apr-05	Apr-04	% Change	Jan-Apr05	Jan-Apr04	% Change
Rural (215)	859,405	627,023	37.1	984,813	1,141,807	-13.7	3,088,988	2,770,835	11.5
Seaside (63)	45,403	28,921	57.0	66,665	85,684	-22.2	149,027	148,700	0.2
Urban (194)	1,150,810	962,775	19.5	1,274,682	1,439,416	-11.4	3,916,975	3,940,446	-0.6
<b>SCOTLAND (472)</b>	<b>2,055,618</b>	<b>1,618,719</b>	<b>27.0</b>	<b>2,326,160</b>	<b>2,666,907</b>	<b>-12.8</b>	<b>7,154,990</b>	<b>6,859,981</b>	<b>4.3</b>

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

## 6.0 PERFORMANCE BY VOLUME OF VISITS

### Performance by Volume of Visits – March 2005/2004; April 2005/2004 and January-April 2005/2004

Range of Volume of Visits	Mar-05	Mar-04	% Change	Apr-05	Apr-04	% Change	Jan-Apr05	Jan-Apr04	% Change
1 - 19,999 (287)	78,048	49,208	58.6	162,366	186,629	-13.0	300,559	292,689	2.7
20,000 - 49,999 (77)	127,482	95,362	33.7	207,153	245,372	-15.6	453,553	466,210	-2.7
50,000 + (108)	1,850,009	1,474,017	25.5	1,956,377	2,234,593	-12.5	6,400,535	6,100,637	4.9
<b>SCOTLAND (472)</b>	<b>6,205,187</b>	<b>4,894,072</b>	<b>26.8</b>	<b>7,016,659</b>	<b>8,038,486</b>	<b>-12.7</b>	<b>21,464,627</b>	<b>20,579,498</b>	<b>4.3</b>

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 – March 2005/2004; April 2005/2004 and January-April 2005/2004

Admission	Mar-05	Mar-04	% Change	Apr-05	Apr-04	% Change	Jan-Apr05	Jan-Apr04	% Change
Free (199)	1,556,822	1,265,322	23.0	1,577,017	1,808,961	-12.8	5,418,473	5,146,950	5.3
Paid (273)	498,796	353,397	41.1	749,143	857,946	-12.7	1,736,517	1,713,031	1.4
<b>SCOTLAND (472)</b>	<b>2,055,618</b>	<b>1,618,719</b>	<b>27.0</b>	<b>2,326,160</b>	<b>2,666,907</b>	<b>-12.8</b>	<b>7,154,990</b>	<b>6,859,981</b>	<b>4.3</b>

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 – March 2005/2004; April 2005/2004 and January-April 2005/2004

LEC	Mar-05	Mar-04	% Change	Apr-05	Apr-04	% Change	Jan-Apr05	Jan-Apr04	% Change
Argyll & The Islands (28)	24,255	14,407	68.4	40,529	52,302	-22.5	80,509	82,628	-2.6
Ayrshire (13)	43,125	21,807	97.8	61,561	63,845	-3.6	156,642	128,086	22.3
Borders (35)	53,851	25,981	107.3	73,724	71,453	3.2	178,158	138,442	28.7
Caithness & Sutherland (13)	2,780	379	633.5	5,657	6,160	-8.2	8,741	6,837	27.8
Dumfries & Galloway (35)	34,572	23,817	45.2	67,373	87,766	-23.2	127,287	138,844	-8.3
Dunbartonshire (5)	37,192	35,275	5.4	36,065	50,351	-28.4	121,188	138,872	-12.7
Edinburgh & Lothian (57)	500,823	399,494	25.4	562,046	609,071	-7.7	1,724,483	1,700,906	1.4
Fife (30)	44,179	37,298	18.4	57,949	74,463	-22.2	154,979	163,848	-5.4
Forth Valley (22)	102,766	81,557	26.0	121,396	155,106	-21.7	313,877	335,932	-6.6
Glasgow (29)	280,272	259,051	8.2	289,096	320,636	-9.8	962,658	969,841	-0.7
Grampian (45)	84,950	69,861	21.6	118,414	114,892	3.1	309,484	295,579	4.7
Inverness & Nairn (12)	33,441	24,424	36.9	55,981	60,632	-7.7	124,536	124,727	-0.2
Lanarkshire (10)	589,495	450,918	30.7	519,401	642,746	-19.2	2,090,984	1,842,192	13.5
Lochaber (11)	14,046	12,234	14.8	19,106	23,647	-19.2	48,766	57,446	-15.1
Moray, Badenoch & Strathspey (20)	50,125	38,746	29.4	61,278	66,372	-7.7	170,739	159,822	6.8
Orkney (14)	4,463	3,477	28.4	11,907	18,038	-34.0	18,016	24,039	-25.1
Renfrewshire (10)	49,911	44,032	13.4	51,804	52,448	-1.2	169,362	164,247	3.1
Ross & Cromarty (12)	2,563	960	167.0	10,374	10,395	-0.2	13,931	12,446	11.9
Shetland (14)	213	230	-7.4	1,792	2,650	-32.4	2,085	2,974	-29.9
Skye & Lochalsh (5)	9,785	4,717	107.4	27,330	25,173	8.6	38,754	31,358	23.6
Tayside (45)	90,210	67,994	32.7	128,576	152,870	-15.9	329,620	330,116	-0.2
Western Isles (7)	2,601	2,060	26.3	4,801	5,891	-18.5	10,191	10,799	-5.6
<b>SCOTLAND (472)</b>	<b>2,055,618</b>	<b>1,618,719</b>	<b>27.0</b>	<b>2,326,160</b>	<b>2,666,907</b>	<b>-12.8</b>	<b>7,154,990</b>	<b>6,859,981</b>	<b>4.3</b>

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 January-April 2005.

**Reasons for positive impacts on visitor figures:-***Early Easter increased March visitor figures.**Special events and exhibitions.**Attracting more school groups.**Still seeing great benefit from Ryanair Prestwick flights.***Reasons for negative impacts in visitor figures:-***Poor weather this year compared with last year.**Early Easter led to reduced numbers in April.**Worst year ever so far, maybe the election had a negative effect.**There seemed to be less people travelling after the Tsunami.*