

2005 SCOTTISH VISITOR ATTRACTION BAROMETER July 2005 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. 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 July 2005 with July 2004. Some 453 attraction operators provided figures for the month of July 2005 with 443 attractions providing comparable visits figures.

Argyll, the Isles, Loch Lomond and the Trossachs is abbreviated to ALLST throughout the report.

2.0 JULY 2005/2004 Summary

The total number of visits for the responding 443 barometer attractions in Scotland for the month of July 2005 was 2,638,722. When compared to data from the previous year of 2,897,320 visits, this shows a visits decrease of **-8.4%**. The total number of visits representing the 443 barometer attractions in Scotland for the period January-July 2005 was 11,220,252. When compared to data from the previous year of 11,399,496, this shows a visits decrease of **-1.6%**.

The following table shows total visits recorded for July 2005/2004 and January-July 2005/2004 as well as the % change calculation.

Attractions	Jul-05	Jul-04	%Change	Jan-Jul05	Jan-Jul04	%Change
443	2,638,722	2,879,320	-8.4	11,220,252	11,399,496	-1.6

A further breakdown is shown below, where the visits during the individual months of January-July 2005 can be compared with January-July 2004 with their % change calculations.

Attractions	Month	Visits	Months	Visits	%Change
443	Jan-05	700,825	Jan-04	679,176	3.2
	Feb-05	887,703	Feb-04	923,838	-3.9
	Mar-05	1,311,305	Mar-04	1,031,100	27.2
	Apr-05	1,607,266	Apr-04	1,808,063	-11.1
	May-05	1,909,844	May-04	1,924,458	-0.8
	Jun-05	2,164,587	Jun-04	2,153,541	0.5
	Jul-05	2,638,722	Jul-04	2,879,320	-8.4

The only increase in visits recorded by Region in July 2005, compared with July 2004, was experienced in Greater Glasgow (8.2%). Shetland Islands showed the largest decreases in visits during the same period with a decline of -33.1% followed by Angus & City of Dundee (-20.3%) and then Argyll, the Isles, Loch Lomond and the Trossachs with a decline in visits figures of 20.1%.

During this period the highest increases in visits were recorded by the Transport Related category (13.8%) followed by the Industrial/ Craft Premises category (3.7%). The Castle / Palace category experienced the largest decline in visits of -25.5%, followed by the Historic Heritage Site category at -22.4% and the Distillery category at -10.8%.

There were no increases when looking at attractions according to their location during the same period July 05 and July 04. Attractions in Seaside locations saw the greatest decline in number of visits (-14.5%); followed by attractions in Urban areas (-8.8%) and then those in Rural areas (-6.4%). The attractions that welcomed under 19,999 visits saw the largest decline of -11.7%; those welcoming between 20,000 and 49,000 visits experienced a decline of -8.1% and those welcoming over 50,000 visits saw a smaller decrease of -7.8%.

Paid admission attractions saw a decrease in visits of -14.6% whereas free admission attractions experienced a decline of -2.3% when comparing July 2005 with July 2004.

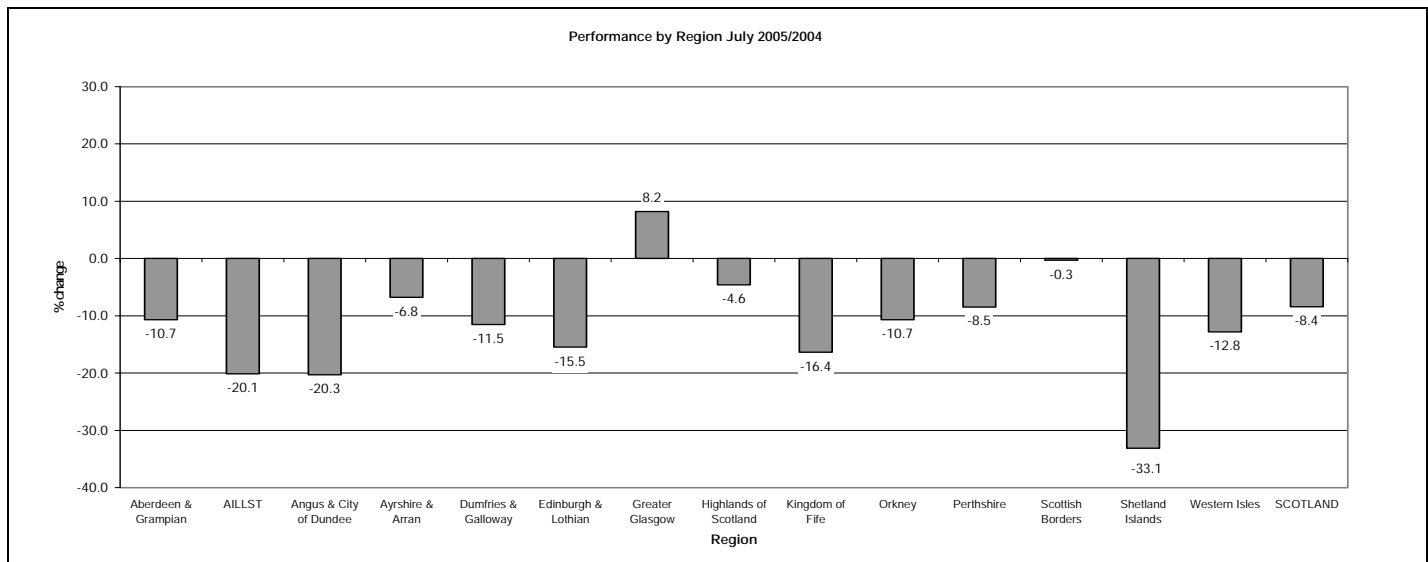
The highest increases in visits by LEC area were experienced by attractions in Renfrewshire (14.9%), Glasgow (10.3%) and Skye & Lochalsh (6.4%), whereas Shetland; Forth Valley; and Argyll and The Islands experienced decreases in visits of -33.1%; -21.7% and -18.0% respectively.

PERFORMANCE BY REGION

Performance by Region – July 2005/2004 and January-July 2005/2004

Region	Jul-05	Jul-04	%Change	Jan-Jul05	Jan-Jul04	%Change
Aberdeen & Grampian (58)	255,991	286,596	-10.7	1,069,189	1,062,975	0.6
ALLST (46)	293,238	367,199	-20.1	1,236,716	1,349,099	-8.3
Angus & City of Dundee (22)	107,832	135,301	-20.3	511,405	546,135	-6.4
Ayrshire & Arran (17)	137,464	147,492	-6.8	494,494	508,361	-2.7
Dumfries & Galloway (32)	95,567	108,006	-11.5	357,236	397,675	-10.2
Edinburgh & Lothian (50)	410,883	486,083	-15.5	2,125,453	2,173,851	-2.2
Greater Glasgow (48)	638,562	590,284	8.2	3,130,045	2,989,666	4.7
Highlands of Scotland (57)	309,104	324,029	-4.6	957,612	995,335	-3.8
Kingdom of Fife (27)	90,227	107,896	-16.4	338,567	366,360	-7.6
Orkney (15)	71,285	79,821	-10.7	185,407	206,669	-10.3
Perthshire (20)	108,206	118,216	-8.5	331,734	356,117	-6.8
Scottish Borders (32)	97,102	97,390	-0.3	413,508	368,605	12.2
Shetland Islands (14)	12,431	18,585	-33.1	34,166	41,285	-17.2
Western Isles (5)	10,830	12,422	-12.8	34,720	37,363	-7.1
SCOTLAND (443)	2,638,722	2,879,320	-8.4	11,220,252	11,399,496	-1.6

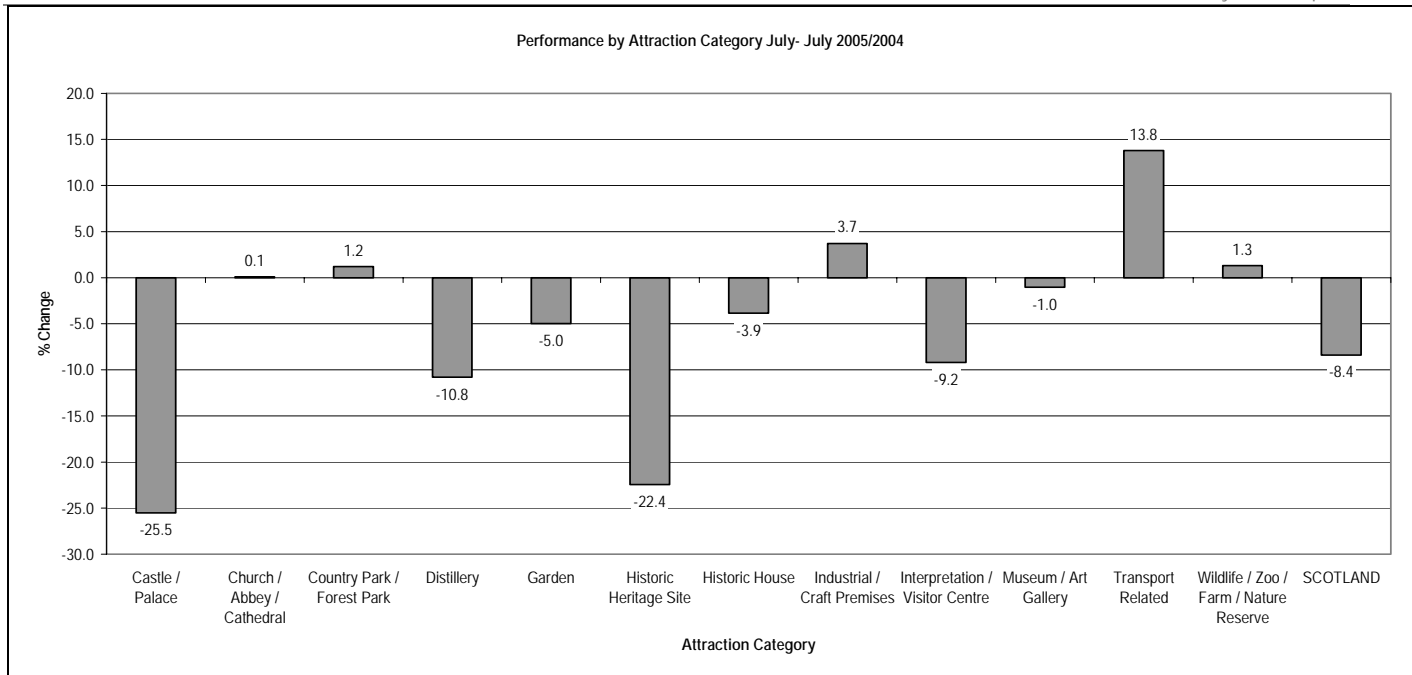
Note: Number in brackets indicates the number of visitor attractions per region.


4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – July 2005/2004 and January-July 2005/2004

Category	Jul-05	Jul-04	% Change	Jan-Jul05	Jan-Jul04	%Change
Castle / Palace (62)	449,969	604,132	-25.5	1,742,191	1,957,112	-11.0
Church / Abbey / Cathedral (14)	55,799	55,750	0.1	195,805	170,657	14.7
Country Park / Forest Park (8)	279,215	275,853	1.2	1,286,430	1,151,931	11.7
Distillery (20)	55,119	61,792	-10.8	185,849	192,037	-3.2
Garden (24)	114,195	120,178	-5.0	473,390	452,767	4.6
Historic Heritage Site (33)	96,023	123,820	-22.4	324,562	375,540	-13.6
Historic House (34)	139,352	144,947	-3.9	473,924	474,016	0.0
Industrial / Craft Premises (10)	41,891	40,393	3.7	213,847	215,024	-0.5
Interpretation / Visitor Centre (74)	477,672	526,008	-9.2	1,892,716	2,014,444	-6.0
Museum / Art Gallery (138)	756,174	764,063	-1.0	3,848,638	3,833,699	0.4
Transport Related (8)	80,310	70,575	13.8	261,654	253,995	3.0
Wildlife / Zoo / Farm / Nature Reserve (18)	93,003	91,809	1.3	321,246	308,274	4.2
SCOTLAND (443)	2,638,722	2,879,320	-8.4	11,220,252	11,399,496	-1.6

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



5.0 PERFORMANCE BY LOCATION

Performance by Location – July 2005/2004 and January-July 2005/2004

Location	Jul-05	Jul-04	% Change	Jan-Jul05	Jan-Jul04	%Change
Rural (198)	980,938	1,048,218	-6.4	3,557,036	3,576,086	-0.5
Seaside (59)	181,705	212,521	-14.5	579,003	612,017	-5.4
Urban (186)	1,476,079	1,618,581	-8.8	7,084,213	7,211,393	-1.8
Scotland (443)	2,638,722	2,879,320	-8.4	11,220,252	11,399,496	-1.6

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

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – July 2005/2004 and January-July 2005/2004

Range of Volume of Visits	Jul-05	Jul-04	% Change	Jan-Jul05	Jan-Jul04	%Change
1 - 19,999 (272)	347,789	393,736	-11.7	1,124,383	1,198,139	-6.2
20,000 - 49,999 (74)	366,962	399,414	-8.1	1,307,046	1,381,157	-5.4
50,000 + (97)	1,923,971	2,086,170	-7.8	8,788,823	8,820,200	-0.4
SCOTLAND (443)	2,638,722	2,879,320	-8.4	11,220,252	11,399,496	-1.6

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 – July 2005/2004 and January-July 2005/2004

Admission	Jul-05	Jul-04	% Change	Jan-Jul05	Jan-Jul04	%Change
Free (184)	1,429,091	1,463,362	-2.3	6,689,226	6,579,494	1.7
Paid (259)	1,209,631	1,415,958	-14.6	4,531,026	4,820,002	-6.0
SCOTLAND (443)	2,638,722	2,879,320	-8.4	11,220,252	11,399,496	-1.6

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 – July 2005/2004 and January-July 2005/2004

LEC	Jul-05	Jul-04	%Change	Jan-Jul05	Jan-Jul04	%Change
Argyll & The Islands (24)	86,689	105,688	-18.0	294,046	310,938	-5.4
Ayrshire (14)	124,443	135,345	-8.1	457,290	474,296	-3.6
Borders (32)	97,102	97,390	-0.3	413,508	368,605	12.2
Caithness & Sutherland (14)	27,118	25,720	5.4	62,994	61,154	3.0
Dumfries & Galloway (32)	95,567	108,006	-11.5	357,236	397,675	-10.2
Dunbartonshire (5)	53,083	58,840	-9.8	260,698	290,119	-10.1
Edinburgh & Lothian (50)	410,883	486,083	-15.5	2,125,453	2,173,851	-2.2
Fife (27)	90,227	107,896	-16.4	338,567	366,360	-7.6
Forth Valley (22)	185,272	236,693	-21.7	827,766	905,946	-8.6
Glasgow (27)	338,726	307,031	10.3	1,801,639	1,749,251	3.0
Grampian (43)	186,317	206,745	-9.9	770,754	764,696	0.8
Inverness, Nairn, Badenoch & Strathspey (16)	178,786	191,391	-6.6	587,128	599,284	-2.0
Lanarkshire (10)	216,997	207,401	4.6	858,958	785,386	9.4
Lochaber (11)	54,744	56,813	-3.6	171,532	188,953	-9.2
Moray (15)	66,005	70,822	-6.8	287,123	282,285	1.7
Orkney (15)	71,285	79,821	-10.7	185,407	206,669	-10.3
Renfrewshire (10)	67,838	59,045	14.9	370,437	345,507	7.2
Ross & Cromarty (11)	37,899	42,516	-10.9	100,721	108,595	-7.3
Shetland (14)	12,431	18,585	-33.1	34,166	41,285	-17.2
Skye & Lochalsh (4)	7,130	6,700	6.4	22,993	22,612	1.7
Tayside (42)	219,350	258,367	-15.1	857,116	918,666	-6.7
Western Isles (5)	10,830	12,422	-12.8	34,720	37,363	-7.1
SCOTLAND (443)	2,638,722	2,879,320	-8.4	11,220,252	11,399,496	-1.6

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

* Badenoch & Strathspey, once part of Moray, Badenoch and Strathspey Enterprise have now transferred to Inverness and Nairn Enterprise following LEC boundary revisions.

9.0 COMMENTS

The following quotes have been drawn from comments made by operators to explain the reasons that have impacted on visitation performance during the period July 2005.

Reasons for positive impacts on visitor figures:-

Better than average weather
 Special exhibitions
 Higher number of independent travellers
 Open Championship in St Andrews swelled numbers
 Bad weather in Shetland a major factor in our figures
 Barbara Kruger exhibition at GOMA

Reasons for negative impacts in visitor figures:-

Additional ferry services needed
 Island figures down due to impact of Natwest Island Games
 Violence of G8 protestors
 G8 summit caused attraction to be closed for 3 days
 London bombings affected number of English visitors
 High petrol prices
 Less Scottish day trip visitors

Please note your data can now be submitted on-line, if you have Adobe acrobat reader. You can submit data to:
www.moffatcentre.com/moffat_forms/VAB.pdf