

2005 SCOTTISH VISITOR ATTRACTION BAROMETER May 2005 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. 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 May 2005 with May 2004. Some 472 attraction operators provided figures for the month of May 2005 with 461 attractions providing comparable visits figures, giving a response rate of 97%

The visitor figures recorded can be compared with data collected in year 2004. 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 asterisk).

2.0 MAY 2005/2004

Summary

The total number of visits for the responding 461 barometer attractions in Scotland for the month of May 2005 was 2,699,575. When compared to data from the previous year of 2,684,674 visits, this shows a visits increase of **0.6%**. The total number of visits representing the 461 barometer attractions in Scotland for the period January-May 2005 was 9,697,604. When compared to data from the previous year of 9,309,658, shows a visits increase of **4.2%**.

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

Attractions	May-05	May-04	%Change	Jan-May05	Jan-May04	%Change
461	2,699,575	2,684,674	0.6	9,697,604	9,309,658	4.2

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

Attractions	Month	Visits	Months	Visits	%Change
461	Jan-05	1,282,221	Jan-04	1,088,204	17.8
	Feb-05	1,429,045	Feb-04	1,388,056	3.0
	Mar-05	2,015,637	Mar-04	1,555,287	29.6
	Apr-05	2,271,126	Apr-04	2,593,437	-12.4
	May-05	2,699,575	May-04	2,684,674	0.6

The highest increases in visits recorded by Region in May 2005 were experienced in Aberdeen and Grampian (16.1%) and Edinburgh and Lothian (4.3%). The Shetland Islands showed the largest decreases in visits during the same period with a decline of -16.3%. Ayrshire and Arran also saw a decline in visits figures (-14.8%).

During this period the highest increases in visits were recorded by the Church/ Abbey/ Cathedral category (27.5%), Industrial and Craft Premises category (11.1%) and the Museum and Art Gallery category (9.2%). The Historic Heritage Site category experienced decline in visits of -15.7%, followed by the Garden category at -12.2%.

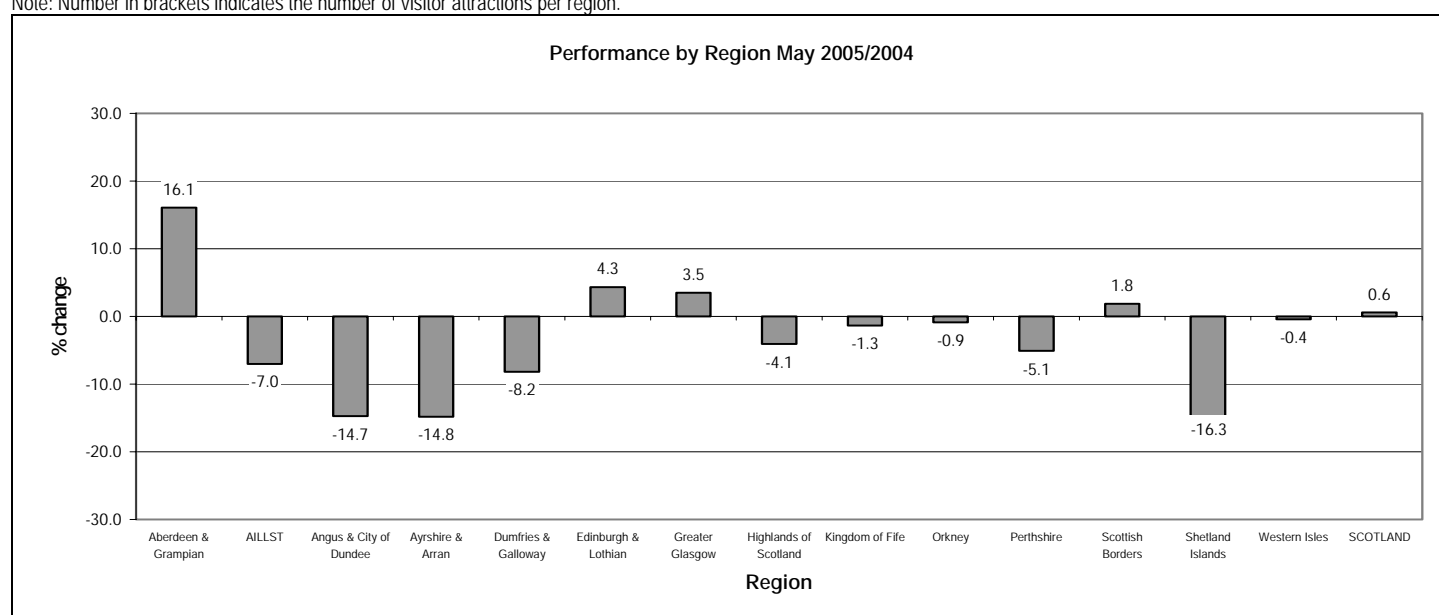
The greatest increases in visits were experienced by attractions located in Rural areas (1.5%), followed by Seaside areas (1.3%), the decrease in visits figures took place in Urban areas where there was a decrease of -0.4%. The attractions that welcomed over 50,000 visits saw the largest increase of 2.8%, attractions welcoming under 19,999 visits saw the largest decrease of -9.7%, with attractions in the 20,000-49,999 range showing a decrease of -8.3%. Free admissions experienced an increase of 1.6% in visits, whereas Paid attractions saw a decrease of -1.4% when comparing May 2005 with May 2004. The highest increases in visits by LEC area were experienced by attractions in Grampian (18.3%), Moray, Badenoch and Spey (8.8%) and Glasgow (6.1%), whereas Dunbartonshire, Ayrshire, Shetland and Tayside experienced decreases in visits of -16.8, -16.6%, -16.3% and -10.8% respectively.

3.0 PERFORMANCE BY REGION

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

Region	May-05	May-04	%Change	Jan-May05	Jan-May04	%Change
Aberdeen & Grampian (56)	181,452	156,342	16.1	542,708	488,820	11.0
AILLST (51)	231,745	249,200	-7.0	724,141	732,609	-1.2
Angus & City of Dundee (22)	90,317	105,893	-14.7	317,690	329,049	-3.5
Ayrshire & Arran (18)	95,784	112,455	-14.8	267,385	254,398	5.1
Dumfries & Galloway (33)	68,698	74,809	-8.2	192,282	210,041	-8.5
Edinburgh & Lothian (58)	562,838	539,401	4.3	2,270,249	2,200,749	3.2
Greater Glasgow (49)	1,025,864	991,333	3.5	4,261,706	3,983,079	7.0
Highlands of Scotland (57)	180,691	188,386	-4.1	435,014	439,148	-0.9
Kingdom of Fife (28)	71,354	72,321	-1.3	219,743	230,104	-4.5
Orkney (14)	33,110	33,399	-0.9	51,126	57,438	-11.0
Perthshire (20)	69,397	73,126	-5.1	135,312	142,857	-5.3
Scottish Borders (36)	75,298	73,937	1.8	255,317	213,955	19.3
Shetland Islands (13)	5,199	6,209	-16.3	7,010	8,749	-19.9
Western Isles (6)	7,828	7,863	-0.4	17,921	18,662	-4.0
Scotland (461)	2,699,575	2,684,674	0.6	9,697,604	9,309,658	4.2

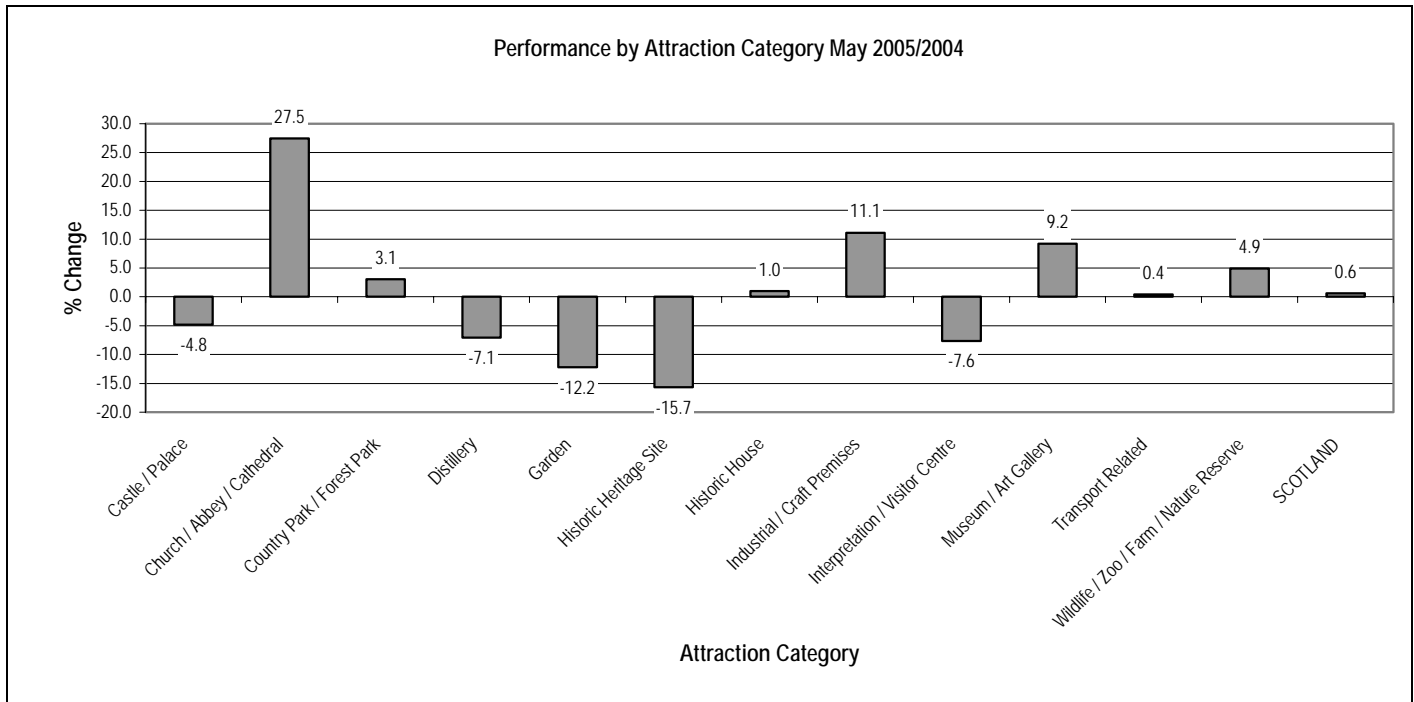
Note: Number in brackets indicates the number of visitor attractions per region.


4.0 PERFORMANCE BY ATTRACTION CATEGORY

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

Category	May-05	May-04	% Change	Jan-May05	Jan-May04	%Change
Castle / Palace (64)	350,681	368,498	-4.8	955,810	979,591	-2.4
Church / Abbey / Cathedral (15)	36,376	28,537	27.5	96,118	76,196	26.1
Country Park / Forest Park (11)	777,404	754,368	3.1	3,209,231	2,847,432	12.7
Distillery (20)	30,707	33,041	-7.1	78,326	73,708	6.3
Garden (28)	171,887	195,750	-12.2	528,130	537,446	-1.7
Historic Heritage Site (33)	60,168	71,345	-15.7	141,193	166,032	-15.0
Historic House (34)	104,019	102,994	1.0	290,437	285,474	1.7
Industrial / Craft Premises (11)	38,683	34,822	11.1	139,421	139,395	0.0
Interpretation / Visitor Centre (76)	334,523	362,166	-7.6	1,011,390	1,079,944	-6.3
Museum / Art Gallery (144)	705,022	645,771	9.2	3,003,548	2,878,793	4.3
Transport Related (7)	34,999	34,852	0.4	83,080	85,298	-2.6
Wildlife / Zoo / Farm / Nature Reserve (18)	55,106	52,530	4.9	160,920	160,349	0.4
SCOTLAND (461)	2,699,575	2,684,674	0.6	9,697,604	9,309,658	4.2

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



5.0 PERFORMANCE BY LOCATION

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

Location	May-05	May-04	% Change	Jan-May05	Jan-May04	%Change
Rural (206)	1,274,677	1,256,440	1.5	4,356,734	3,979,365	9.5
Seaside (59)	110,389	108,971	1.3	243,701	237,145	2.8
Urban (196)	1,314,509	1,319,263	-0.4	5,097,169	5,093,148	0.1
SCOTLAND (461)	2,699,575	2,684,674	0.6	9,697,604	9,309,658	4.2

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 2005/2004 and January-May 2005/2004

Range of Volume of Visits	May-05	May-04	% Change	Jan-May05	Jan-May04	%Change
1 - 19,999 (283)	233,211	258,345	-9.7	531,602	550,246	-3.4
20,000 - 49,999 (74)	232,469	253,411	-8.3	670,362	706,118	-5.1
50,000 + (104)	2,233,895	2,172,918	2.8	8,495,640	8,053,294	5.5
SCOTLAND (461)	2,699,575	2,684,674	0.6	9,697,604	9,309,658	4.2

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 2005/2004 and January-May 2005/2004

Admission	May-05	May-04	% Change	Jan-May05	Jan-May04	%Change
Free (192)	1,761,099	1,733,037	1.6	7,015,385	6,633,744	5.8
Paid (269)	938,476	951,637	-1.4	2,682,219	2,675,914	0.2
SCOTLAND (461)	2,699,575	2,684,674	0.6	9,697,604	9,309,658	4.2

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 – May 2005/2004 and January-May 2005/2004

LEC Area	May-05	May-04	% Change	Jan-May05	Jan-May04	% Change
Argyll & The Islands (27)	65,694	72,102	-8.9	151,709	154,653	-1.9
Ayrshire (14)	82,759	99,287	-16.6	239,558	228,070	5.0
Borders (36)	75,298	73,937	1.8	255,317	213,955	19.3
Caithness & Sutherland (14)	10,705	11,611	-7.8	19,627	18,513	6.0
Dumfries & Galloway (33)	68,698	74,809	-8.2	192,282	210,041	-8.5
Dunbartonshire (5)	37,183	44,698	-16.8	158,371	183,570	-13.7
Edinburgh & Lothian (58)	562,838	539,401	4.3	2,270,249	2,200,749	3.2
Fife (28)	71,354	72,321	-1.3	219,743	230,104	-4.5
Forth Valley (25)	156,610	162,845	-3.8	510,951	497,251	2.8
Glasgow (27)	273,447	257,763	6.1	1,190,433	1,177,907	1.1
Grampian (41)	120,372	101,742	18.3	368,410	326,843	12.7
Inverness & Nairn (10)	64,199	65,704	-2.3	146,738	151,956	-3.4
Lanarkshire (10)	672,809	657,752	2.3	2,763,793	2,499,944	10.6
Lochaber (10)	30,198	29,265	3.2	77,427	85,211	-9.1
Moray, Badenoch & Strathspey (20)	82,134	75,482	8.8	253,054	235,308	7.5
Orkney (14)	33,110	33,399	-0.9	51,126	57,438	-11.0
Renfrewshire (11)	66,173	62,667	5.6	241,185	233,547	3.3
Ross & Cromarty (12)	22,969	24,287	-5.4	36,900	36,733	0.5
Shetland (13)	5,199	6,209	-16.3	7,010	8,749	-19.9
Skye & Lochalsh (5)	27,154	29,034	-6.5	65,475	60,392	8.4
Tayside (42)	162,844	182,496	-10.8	460,325	480,062	-4.1
Western Isles (6)	7,828	7,863	-0.4	17,921	18,662	-4.0
SCOTLAND (461)	2,699,575	2,684,674	0.6	9,697,604	9,309,658	4.2

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 2005.

Reasons for positive impacts on visitor figures:-

Attendance improved thanks to additional publicity from press releases
 Special exhibition on the weekend of the 14th/15th May boosted numbers
 Poor weather increased number of visitors
 Additional pavement signs at weekends

Reasons for negative impacts in visitor figures:-

Fewer school visits
 Poor weather
 Fewer coaches
 Expensive fuel charges