

2005 SCOTTISH VISITOR ATTRACTION BAROMETER October 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 October 2005 with October 2004. Some 470 attraction operators provided figures for the month of October 2005 with 432 attractions providing comparable visits figures.

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

2.0 October 2005/2004 Summary

The total number of visits for the responding 432 barometer attractions in Scotland for the month of October 2005 was 2,161,797. When compared to data from the previous year of 1,974,951 visits, this shows a visits increase of **9.5%**. The total number of visits representing the 432 barometer attractions in Scotland for the period January-October 2005 was 24,098,748. When compared to data from the previous year of 23,489,928 this shows a visits increase of **3.4%**.

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

Attractions	Oct-05	Oct-04	%Change	Jan-Oct05	Jan-Oct04	%Change
432	2,161,797	1,974,951	9.5	24,098,748	23,489,928	3.4

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

Attractions	Months	Visits	Months	Visits	%Change
432	Jan-05	1,213,749	Jan-04	1,046,300	16.0
	Feb-05	1,355,503	Feb-04	1,320,040	2.7
	Mar-05	1,892,812	Mar-04	1,477,846	28.1
	Apr-05	2,113,681	Apr-04	2,428,046	-12.9
	May-05	2,509,216	May-04	2,469,649	1.6
	Jun-05	2,804,999	Jun-04	2,762,604	1.5
	Jul-05	3,609,131	Jul-04	3,528,123	2.3
	Aug-05	3,961,496	Aug-04	3,954,253	0.2
	Sep-05	2,476,364	Sep-04	2,341,270	5.8
	Oct-05	2,161,797	Oct-04	1,974,951	9.5

The highest increase in visits recorded by Region in October 2005, compared with October 2004, was experienced in The Shetland Islands (106.6%); followed by Greater Glasgow (29%) and Edinburgh & Lothian (6.9%). Orkney showed the largest decreases in visits during the same period with a decline of -16%, followed by Angus and City of Dundee (-15.3%) then Scottish Borders with a decline of -15.2%.

During this period the highest increases in visits were recorded by the Country Park/ Forest Park category (38.1%) followed by the Church/ Abbey/ Cathedral category (31.2%). The Transport Related category experienced the largest decline in visits of -12.4%, followed by Interpretation/ Visitor Centre (-6.4%) and Historic Heritage Site (-4.9%).

Attractions located in Rural locations saw an increase in visits of 20.5% with those in Urban locations increasing by 2.3% comparing October 2005 with October 2004. Attractions in Seaside locations saw a decline of -5.1%. The attractions that welcomed over 50,000 visits saw an increase in visits of 11.4%; those welcoming between 20,000 and 49,000 saw a decline of -0.4%, with those welcoming less than 19,999 seeing a decline of -4.6%.

Free admission attractions saw an increase of 13.1% along with paid admission attractions experiencing an increase of 2% when comparing October 2005 with October 2004.

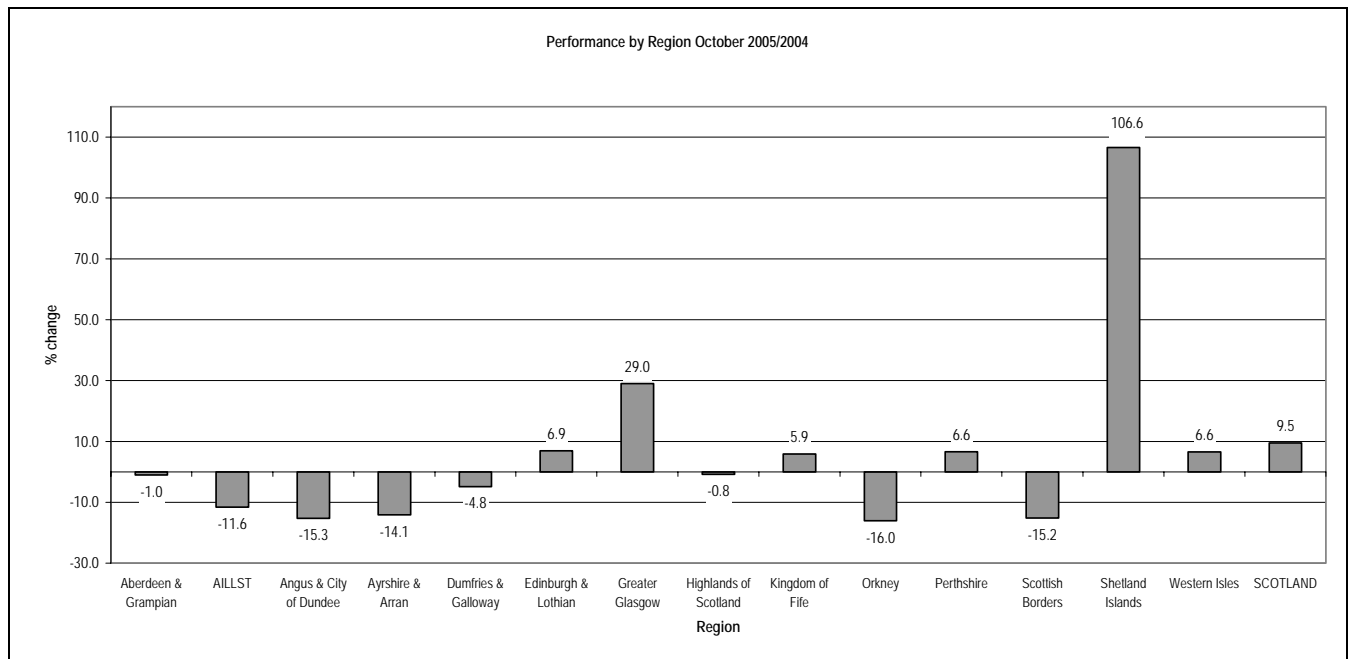
The highest increases in visits by LEC area were experienced by attractions in Shetland (106.6%), Lanarkshire (48.9%) and Ross & Cromarty (11.2%), whereas Caithness & Sutherland; Orkney and Ayrshire experienced decreases in visits of -24.4%; -16% and -15.9% respectively.

3.0 **PERFORMANCE BY REGION**

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

Region	Oct-05	Oct-04	%Change	Jan-Oct05	Jan-Oct04	%Change
Aberdeen & Grampian (46)	113,133	114,233	-1.0	1,437,330	1,419,199	1.3
AILLST (45)	158,594	179,319	-11.6	1,985,268	2,137,649	-7.1
Angus & City of Dundee (23)	60,930	71,947	-15.3	743,909	822,167	-9.5
Ayrshire & Arran (16)	60,473	70,439	-14.1	757,521	795,453	-4.8
Dumfries & Galloway (31)	46,154	48,489	-4.8	589,338	622,478	-5.3
Edinburgh & Lothian (53)	498,631	466,388	6.9	4,876,762	4,748,381	2.7
Greater Glasgow (48)	913,326	707,873	29.0	9,450,983	8,478,013	11.5
Highlands of Scotland (56)	144,989	146,087	-0.8	1,905,193	1,923,247	-0.9
Kingdom of Fife (28)	51,089	48,241	5.9	636,443	656,594	-3.1
Orkney (14)	9,073	10,805	-16.0	321,744	341,807	-5.9
Perthshire (20)	49,637	46,554	6.6	607,415	619,604	-2.0
Scottish Borders (34)	52,086	61,392	-15.2	675,632	619,744	9.0
Shetland Islands (14)	597	289	106.6	56,802	63,331	-10.3
Western Isles (4)	3,085	2,895	6.6	54,408	55,415	-1.8
SCOTLAND (432)	2,161,797	1,974,951	9.5	24,098,748	23,303,082	3.4

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

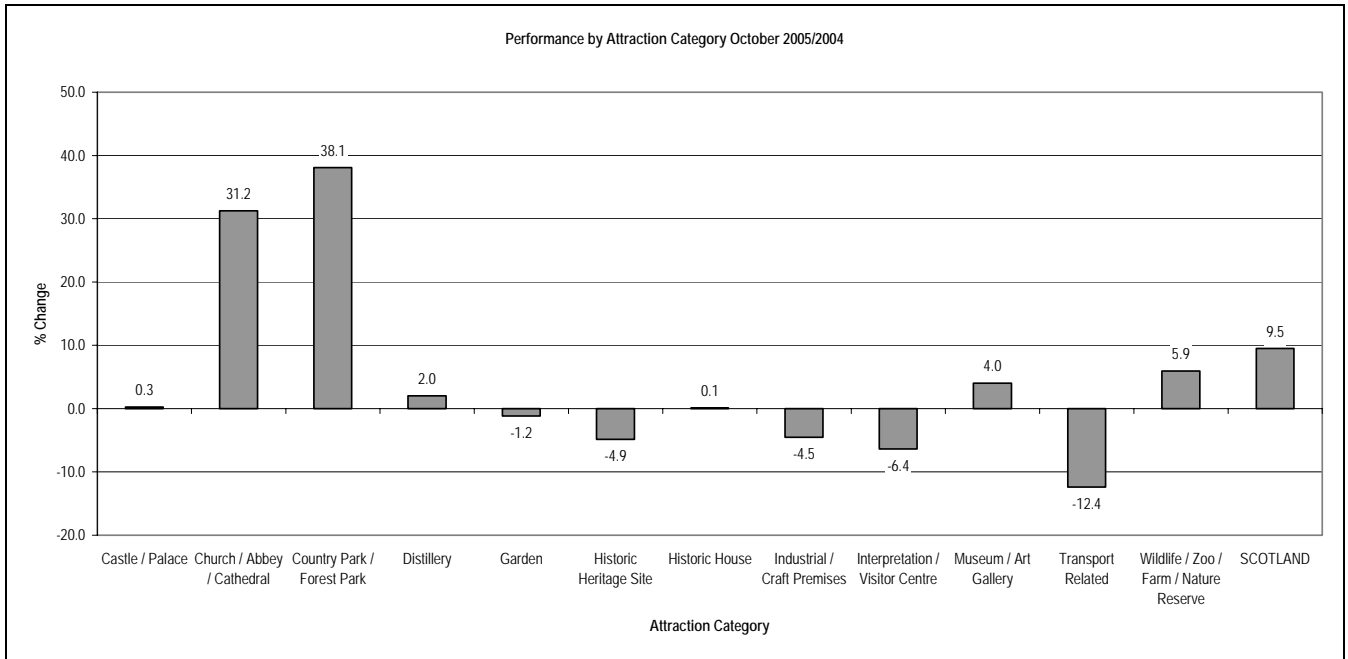


4.0 **PERFORMANCE BY ATTRACTION CATEGORY**

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

Category	Oct-05	Oct-04	% Change	Jan-Oct05	Jan-Oct04	%Change
Castle / Palace (60)	235,607	235,012	0.3	3,217,115	3,362,209	-4.3
Church / Abbey / Cathedral (14)	37,695	28,721	31.2	448,452	407,001	10.2
Country Park / Forest Park (9)	621,936	450,501	38.1	6,810,788	5,916,218	15.1
Distillery (16)	24,144	23,671	2.0	277,112	281,695	-1.6
Garden (26)	45,765	46,303	-1.2	701,714	672,997	4.3
Historic Heritage Site (33)	32,503	34,160	-4.9	591,117	621,064	-4.8
Historic House (34)	59,077	59,027	0.1	772,194	773,461	-0.2
Industrial / Craft Premises (10)	31,997	33,516	-4.5	335,682	343,085	-2.2
Interpretation / Visitor Centre (70)	254,444	271,796	-6.4	2,836,629	3,014,965	-5.9
Museum / Art Gallery (134)	749,071	720,149	4.0	7,228,972	7,050,267	2.5
Transport Related (8)	32,621	37,232	-12.4	390,677	387,592	0.8
Wildlife / Zoo / Farm / Nature Reserve (18)	36,937	34,863	5.9	488,296	472,528	3.3
Scotland (432)	2,161,797	1,974,951	9.5	24,098,748	23,303,082	3.4

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



5.0 PERFORMANCE BY LOCATION

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

Location	Oct-05	Oct-04	% Change	Jan-Oct05	Jan-Oct04	%Change
Rural (198)	959,700	796,170	20.5	11,178,005	10,391,852	7.6
Seaside (54)	47,098	49,647	-5.1	913,850	932,307	-2.0
Urban (180)	1,154,999	1,129,134	2.3	12,006,893	11,978,923	0.2
Scotland (432)	2,161,797	1,974,951	9.5	24,098,748	23,303,082	3.4

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

6.0 PERFORMANCE BY VOLUME OF VISITS

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

Range of Volume of Visits	Oct-05	Oct-04	% Change	Jan-Oct05	Jan-Oct04	%Change
1 - 19,999 (258)	104,107	109,083	-4.6	1,798,061	1,847,358	-2.7
20,000 - 49,999 (74)	172,101	172,762	-0.4	2,161,456	2,216,090	-2.5
50,000 + (100)	1,885,589	1,693,106	11.4	20,139,231	19,239,634	4.7
SCOTLAND (432)	2,161,797	1,974,951	9.5	24,098,748	23,303,082	3.4

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 – October 2005/2004 and January-October 2005/2004

Admission	Oct-05	Oct-04	% Change	Jan-Oct05	Jan-Oct04	%Change
Free (177)	1,500,938	1,326,805	13.1	16,009,696	15,094,936	4.9
Paid (255)	660,859	648,146	2.0	8,089,052	8,208,146	-1.6
SCOTLAND (432)	2,161,797	1,974,951	9.5	24,098,748	23,303,082	3.4

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 – October 2005/2004 and January-October 2005/2004

LEC	Oct-05	Oct-04	%Change	Jan-Oct05	Jan-Oct04	%Change
Argyll & The Islands (25)	31,103	34,564	-10.0	479,323	506,555	-5.4
Ayrshire (13)	55,310	65,788	-15.9	695,840	739,989	-6.0
Borders (34)	52,086	61,392	-15.2	675,632	619,744	9.0
Caithness & Sutherland (15)	4,101	5,428	-24.4	117,482	125,417	-6.3
Dumfries & Galloway (31)	46,154	48,489	-4.8	589,338	622,478	-5.3
Dunbartonshire (5)	38,620	43,868	-12.0	412,939	449,139	-8.1
Edinburgh & Lothian (53)	498,631	466,388	6.9	4,876,762	4,748,381	2.7
Fife (28)	51,089	48,241	5.9	636,443	656,594	-3.1
Forth Valley (20)	112,313	125,597	-10.6	1,323,299	1,432,935	-7.7
Glasgow (26)	288,831	267,746	7.9	2,642,163	2,534,386	4.3
Grampian (34)	89,639	90,870	-1.4	1,148,206	1,132,055	1.4
Inverness, Nairn, Badenoch & Strathspey (16)	86,484	85,203	1.5	1,025,421	1,024,605	0.1
Lanarkshire (11)	572,167	384,345	48.9	6,138,699	5,286,623	16.1
Lochaber (10)	23,771	21,895	8.6	294,251	300,219	-2.0
Moray (12)	22,641	23,099	-2.0	272,308	264,602	2.9
Orkney (14)	9,073	10,805	-16.0	321,744	341,807	-5.9
Renfrewshire (10)	35,421	37,834	-6.4	514,666	484,268	6.3
Ross & Cromarty (10)	10,336	9,294	11.2	157,218	164,779	-4.6
Shetland (14)	597	289	106.6	56,802	63,331	-10.3
Skye & Lochalsh (4)	17,962	20,428	-12.1	288,561	277,854	3.9
Tayside (43)	112,383	120,493	-6.7	1,377,243	1,471,906	-6.4
Western Isles (4)	3,085	2,895	6.6	54,408	55,415	-1.8
SCOTLAND (432)	2,161,797	1,974,951	9.5	24,098,748	23,303,082	3.4

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 October 2005.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
Improved Marketing	Continued problems due to road works
Weather remained mild	Restriction of parking areas
Internal transport improved	Restricted opening hours due to staff illness
More visible signage	
October half term kept figures up	