

**2004 SCOTTISH VISITOR ATTRACTION BAROMETER  
AUGUST 2004 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 visit figures, based on contacting 487 attractions. If you have any comments or suggestions, please contact Norin Arshed (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: n.arshed@gcal.ac.uk).

This Barometer compares the period August 2004 with August 2003. It is based on 487 visitor attractions in Scotland. Some 431 attraction operators provided figures for the month of August 2004 with a response rate of 89%.

The visitor figures recorded can be compared with data collected in year 2003. Where there are 4 or less respondents in any section, no comparative % change will be noted because of low sample size (this is indicated by an asterisk).

## 2.0 AUGUST 2004/2003 AND JANUARY – AUGUST 2004/2003

### Summary

The total number of visits for the responding 431 barometer attractions in Scotland for the period January-August 2004 was 14,882,412. When compared to data from the previous year of 14,812,945 visits, this shows a visits increase of 0.5%. The total number of visits representing the 431 barometer attractions in Scotland for the period August 2004 was 3,147,753. When compared to comparable data from the previous year of 3,282,958 visits, this shows a visits decrease of -4.1%.

The following table shows total visits recorded for August 2004/2003 and Jan-August 2004/2003 as well as the % change calculation.

Attractions	Aug-04	Aug-03	% Change	Jan-Aug04	Jan-Aug03	% Change
431	3,147,753	3,282,958	-4.1	14,882,412	14,812,945	0.5

A further breakdown is shown below, where the months of January-August 2004 can be compared with January-August 2003 with their % change calculations.

Attractions	Month	Visits	Month	Visits	% Change
431	Jan-04	698,587	Jan-03	691,729	1.0
	Feb-04	933,340	Feb-03	874,581	6.7
	Mar-04	1,108,303	Mar-03	1,087,292	1.9
	Apr-04	1,869,347	Apr-03	1,845,327	1.3
	May-04	1,931,604	May-03	1,910,637	1.1
	Jun-04	2,280,048	Jun-03	2,280,415	0.0
	Jul-04	2,913,430	Jul-03	2,840,006	2.6
	Aug-04	3,147,753	Aug-03	3,282,958	-4.1

The highest percentage increase in visits recorded by ATB area in August were experienced in Greater Glasgow (6.6%), Perthshire (1.4%) and the Shetland Islands (1.2%). Kingdom of Fife showed the largest decrease in visits during the same period with a decline of -18.3%, followed by the Western Isles with a decrease of -16.7%. During the month of August 2004 the highest increases in visits were recorded by the Transport Related category (25.6%), the Museum or Art Gallery category (10.5%) and the Industrial/Craft Premises category (6.0%). The Historic Heritage category saw a decline in visits of -17.4%, followed by the Castle category with a decrease of -12.3%.

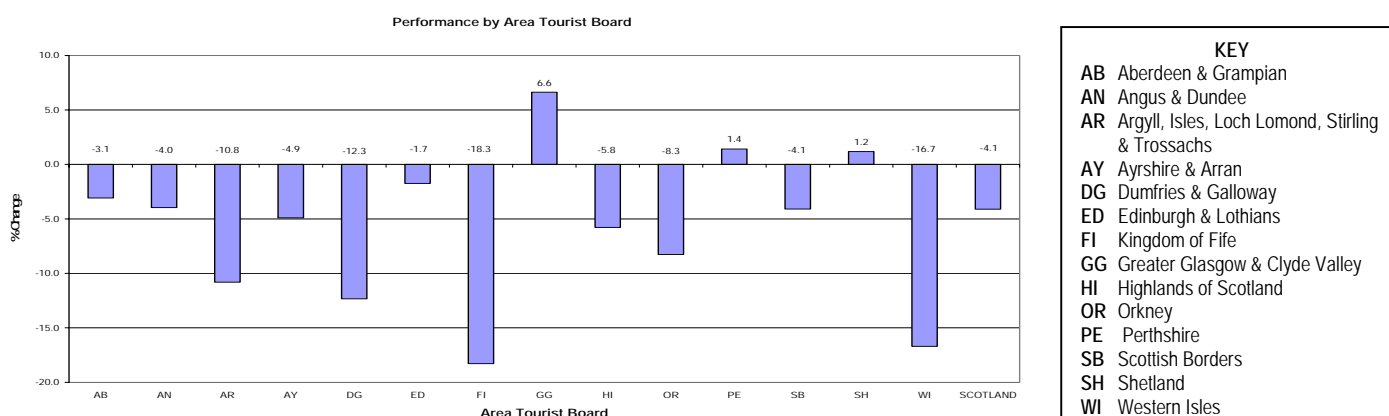
Sites with attractions located in Seaside areas suffered the highest decrease (-7.3%), followed by Rural areas (-6.4%) and the Urban areas (-2.0%) in August 2004 when compared to August 2003. The 1-19,999+ range of volume of visits had the highest decrease in visits at -10.6%. Free admission attractions saw a small increase in visits of 1.5% whereas Paid admission attractions saw a decrease of -8.4%. The highest increases in visits by LEC area were experienced by Caithness & Sutherland (14.8%) and Glasgow (10.3%). Fife experienced the largest decrease in visits of -18.3%, followed by the Lochaber with a decrease of -18.2%.

**3.0 PERFORMANCE BY AREA TOURIST BOARD**

Performance by Area Tourist Board – August 2004/2003 and January-August 2004/2003

ATB Area	Aug-04	Aug-03	% Change	Jan-Aug04	Jan-Aug03	% Change
Aberdeen and Grampian (53)	266,452	274,952	-3.1	1,325,574	1,362,969	-2.7
Angus and City of Dundee (20)	107,362	111,788	-4.0	568,517	590,984	-3.8
ALLST (50)	415,848	466,207	-10.8	1,798,454	1,918,740	-6.3
Ayrshire and Arran (18)	143,395	150,786	-4.9	658,650	676,651	-2.7
Dumfries and Galloway (36)	125,075	142,677	-12.3	544,017	523,481	3.9
Edinburgh and Lothian (38)	626,821	637,909	-1.7	3,037,857	2,914,221	4.2
Kingdom of Fife (25)	100,301	122,735	-18.3	488,901	535,643	-8.7
Greater Glasgow (49)	492,540	461,881	6.6	3,101,231	2,974,006	4.3
Highlands of Scotland (53)	498,292	528,919	-5.8	1,872,712	1,880,591	-0.4
Orkney (15)	86,154	93,916	-8.3	282,907	285,895	-1.0
Perthshire (20)	156,395	154,201	1.4	584,244	544,722	7.3
Scottish Borders (30)	91,079	94,966	-4.1	458,742	441,793	3.8
Shetland Islands (14)	17,163	16,961	1.2	72,085	69,031	4.4
Western Isles (10)	20,876	25,060	-16.7	88,521	94,218	-6.0
<b>SCOTLAND (431)</b>	<b>3,147,753</b>	<b>3,282,958</b>	<b>-4.1</b>	<b>14,882,412</b>	<b>14,812,945</b>	<b>0.5</b>

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

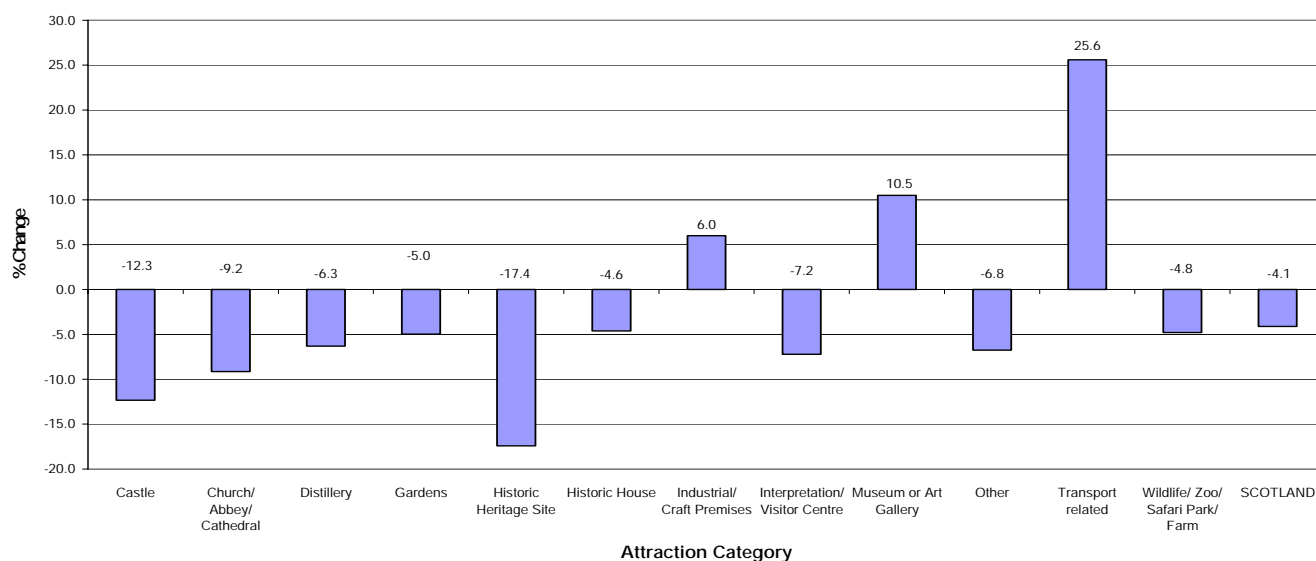

**4.0 PERFORMANCE BY ATTRACTION CATEGORY**

Performance by Attraction Category – August 2004/2003 and January-August 2004/2003

Attraction Category	Aug-04	Aug-03	% Change	Jan-Aug04	Jan-Aug03	% Change
Castle (59)	679,819	775,453	-12.3	2,548,208	2,640,683	-3.5
Church/ Abbey/ Cathedral (14)	125,568	138,230	-9.2	520,970	485,585	7.3
Country Park*	123,248	117,452		796,279	793,314	
Distillery (21)	86,956	92,823	-6.3	329,571	300,392	9.7
Gardens (28)	219,643	231,147	-5.0	1,122,649	1,143,401	-1.8
Historic Heritage Site (20)	73,019	88,412	-17.4	319,014	329,833	-3.3
Historic House (34)	143,314	150,243	-4.6	590,467	594,186	-0.6
Industrial/ Craft Premises (16)	68,388	64,520	6.0	328,388	328,658	-0.1
Interpretation/ Visitor Centre (74)	540,866	582,994	-7.2	2,583,649	2,649,594	-2.5
Monument *	5,369	6,451		17,098	18,184	
Museum or Art Gallery (118)	680,687	616,116	10.5	3,868,587	3,631,208	6.5
Other (22)	299,830	321,569	-6.8	1,457,507	1,511,124	-3.5
Transport Related (6)	33,738	26,862	25.6	101,939	89,124	14.4
Wildlife/ Zoo/ Safari Park/ Farm (13)	67,308	70,686	-4.8	298,086	297,659	0.1
<b>SCOTLAND (431)</b>	<b>3,147,753</b>	<b>3,282,958</b>	<b>-4.1</b>	<b>14,882,412</b>	<b>14,812,945</b>	<b>0.5</b>

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

## Performance by Attraction Category


 5.0 PERFORMANCE BY LOCATION

## Performance by Location – August 2004/2003 and January-August 2004/2003

Performance by Location	Aug-04	Aug-03	% Change	Jan-Aug04	Jan-Aug03	% Change
Rural (199)	1,167,593	1,246,841	-6.4	4,867,843	4,940,082	-1.5
Seaside (61)	264,969	285,986	-7.3	1,026,089	1,021,435	0.5
Urban (171)	1,715,191	1,750,131	-2.0	8,988,480	8,851,428	1.5
<b>SCOTLAND (431)</b>	<b>3,147,753</b>	<b>3,282,958</b>	<b>-4.1</b>	<b>14,882,412</b>	<b>14,812,945</b>	<b>0.5</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 – August 2004/2003 and January-August 2004/2003

Range of Volume of Visits	Aug-04	Aug-03	% Change	Jan-Aug04	Jan-Aug03	% Change
1 - 19,999 (271)	456,923	511,363	-10.6	1,893,681	1,895,685	-0.1
20,000 - 49,999 (73)	449,767	483,519	-7.0	1,918,505	1,961,700	-2.2
50,000 + (87)	2,241,063	2,288,076	-2.1	11,070,226	10,955,560	1.0
<b>SCOTLAND (431)</b>	<b>3,147,753</b>	<b>3,282,958</b>	<b>-4.1</b>	<b>14,882,412</b>	<b>14,812,945</b>	<b>0.5</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 – August 2004/2003 and January-August 2004/2003

Type	Aug-04	Aug-03	% Change	Jan-Aug04	Jan-Aug03	% Change
Free (171)	1,446,237	1,425,063	1.5	7,658,334	7,423,885	3.2
Paid (260)	1,701,516	1,857,895	-8.4	7,224,078	7,389,060	-2.2
<b>SCOTLAND (431)</b>	<b>3,147,753</b>	<b>3,282,958</b>	<b>-4.1</b>	<b>14,882,412</b>	<b>14,812,945</b>	<b>0.5</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 – August 2004/2003 and January-August 2004/2003**

LEC Area	Aug-04	Aug-03	% Change	Jan-Aug04	Jan-Aug03	% Change
Argyll & The Islands (25)	133,741	141,863	-5.7	529,634	543,177	-2.5
Ayrshire (16)	133,380	139,615	-4.5	616,551	632,073	-2.5
Borders (30)	91,079	94,966	-4.1	458,742	441,793	3.8
Caithness & Sutherland (13)	69,623	60,658	14.8	239,705	225,324	6.4
Dumfries & Galloway (36)	125,075	142,677	-12.3	544,017	523,481	3.9
Dunbartonshire (6)	116,014	124,950	-7.2	713,324	753,633	-5.3
Edinburgh & Lothian (38)	626,821	637,909	-1.7	3,037,857	2,914,221	4.2
Fife (25)	100,301	122,735	-18.3	488,901	535,643	-8.7
Forth Valley (23)	253,482	282,610	-10.3	1,093,470	1,169,233	-6.5
Glasgow (26)	323,961	293,764	10.3	2,047,922	1,889,575	8.4
Grampian (40)	188,828	197,752	-4.5	989,760	1,027,508	-3.7
Inverness & Nairn (10)	182,833	185,375	-1.4	624,633	618,312	1.0
Lanarkshire (12)	67,295	69,865	-3.7	413,954	435,417	-4.9
Lochaber (9)	55,846	68,285	-18.2	232,319	253,864	-8.5
Moray, Badenoch & Strathspey (19)	119,155	121,794	-2.2	540,539	541,663	-0.2
Orkney (15)	86,154	93,916	-8.3	282,907	285,895	-1.0
Renfrewshire (9)	25,687	24,987	2.8	149,789	146,330	2.4
Ross & Cromarty (9)	37,892	40,757	-7.0	140,256	144,321	-2.8
Shetland (14)	17,163	16,961	1.2	72,085	69,031	4.4
Skye & Lochalsh (6)	103,633	124,373	-16.7	404,409	412,339	-1.9
Tayside (40)	268,914	272,086	-1.2	1,173,117	1,155,894	1.5
Western Isles (10)	20,876	25,060	-16.7	88,521	94,218	-6.0
<b>SCOTLAND (431)</b>	<b>3,147,753</b>	<b>3,282,958</b>	<b>-4.1</b>	<b>14,882,412</b>	<b>14,812,945</b>	<b>0.5</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 of August 2004 compared to August 2003.

**Reasons for positive impacts on visitor figures:-**

*There was an increase number of overseas visitors.  
Increase in both coach and private parties.  
Now operating 7 days a week.  
Visitor numbers increased due to newspaper advertising.  
Increased number of guided tours.*

**Reasons for negative impacts in visitor figures:-**

*Introduction of car park charges.  
Mixed weather – although mainly wet.  
Terrible weather!  
Closures of A84 for a few days and the bad weather meant attendances did not recover.  
Less coaches than previous year.  
Worst August in 5 years.*