

2002 SCOTTISH VISITOR ATTRACTION BAROMETER JULY 2002 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, based on returns from a representative sample of 311 attractions. If you have any comments or suggestions on this report, please contact Margaret Graham (Tel: 0141 331 8406, Fax: 0141 331 8411, e-mail m.graham@gcal.ac.uk).

2.0 JULY 2002/2001 AND JULY 2002/2000

Year 2002 Barometer reporting applies a different methodology to address the unusual impacts on visitor flows experienced within the visitor attraction sector in 2001 as a result of the Foot and Mouth Disease (FMD) epidemic.

In line with previous barometers, visits figures for July 2002 are compared with those collected during the same period of the previous year, i.e. 2001. However, in order to address the unique positive/negative impacts brought about by FMD comparisons are also being made between visits figures recorded for 2002 and those recorded for the same period in 2000. The early season report covering January-April 2002 demonstrated that this approach provided a more realistic picture of performance while identifying those attractions that either were advantaged or disadvantaged in year 2001 as an effect of FMD.

Where data for an attraction for a particular month is 'missing' or 'not available', two methods of estimating data will be used to address the unusual circumstances related to FMD. Estimating missing visits figures among attractions located in Tourist Board/LEC regions that experienced no obvious impact of FMD will be calculated according to the regional average % change. A different method of calculation will be applied when estimating missing visits figures among attractions where their Tourist Board regional average % change in actual visits figures was artificially high or low in year 2001 due to FMD. These estimates will be calculated using the average increase/decrease experienced by the actual attraction across the three year period. This 'missing' data will be replaced by actual visits figures when and if they become available. Where there are less than 4 respondents in any section, no comparative % change will be noted in brackets because of low sample and visitor numbers. This is indicated by an asterisk.

The Barometer database contains 311 visitor attractions that are located in Scotland. An 89% response rate was achieved realising 276 returns. Attractions were not used in the analysis if they failed to provide comparable data for the three-year period being analysed. This group included attractions with a significant amount of missing data particularly for year 2000.

A total of 291 (94%) barometer participants had visits figures recorded that could be compared with data collected in year 2001 and 2000. Figures for 20 of this group involved estimating their July figure because they were not available at the time of the analysis.

The following table shows total visits recorded for July and the period January-July 2000, 2001 and 2002 as well as % change calculations.

Attractions	July 2002	July 2001	% Change	July 2002	July 2000	% Change
291	2,628,021	2,577,051	2.0	2,628,021	2,636,506	-0.3
Attractions	Jan-July 2002	Jan-July 2001	% Change	Jan-July 2002	Jan-July 2000	% Change
291	10,461,923	10,233,371	2.2	10,461,923	10,425,502	0.3

The total number of visits representing the 291 barometer attractions in Scotland for the period July 2002 was **2,628,021**. When compared to comparable data from the previous year of **2,577,051** visits, this shows an increase of **2.0%**. However, when the total visits figure for 2002 is compared with year 2000's total visits figure of **2,636,506**, performance for year 2002 shows a slight decrease in visits of **-0.3%**. The overall % change for the period January to July 2002 shows an increase of **2.2%** when 2002 visits figures are compared with those for 2001 and a marginal visits increase of **0.3** when the period's 2002 visits are compared with year 2000.

3 PERFORMANCE BY AREA TOURIST BOARD**3.1 Performance By Area Tourist Board: July 2002/2001 2002/2000**

ATB Areas	July 2002	July 2001	% change on Month	July 2002	July 2000	% change on month
Aberdeen and Grampian (37)	282,486	276,992	2.0	282,486	276,084	2.3
Angus and City of Dundee (17)	99,058	106,857	-7.3	99,058	103,877	-4.6
AILLST(34)	434,330	363,501	19.5	434,330	370,062	17.4
Ayrshire and Arran (17)	139,535	153,618	-9.2	139,535	159,620	-12.6
Dumfries and Galloway (24)	85,355	85,783	-0.5	85,355	97,419	-12.4
Edinburgh and Lothians (29)	643,508	633,504	1.6	643,508	642,806	0.1
Kingdom of Fife (21)	92,877	92,388	0.5	92,877	102,120	-9.1
Greater Glasgow and Clyde Valley (26)	365,570	390,846	-6.5	365,570	345,932	5.7
Highlands of Scotland (20)	197,198	208,446	-5.4	197,198	235,976	-16.4
Orkney (14)	72,505	65,737	10.3	72,505	67,277	7.8
Perthshire (16)	116,717	109,738	6.4	116,717	132,013	-11.6
Scottish Borders (19)	62,701	49,601	26.4	62,701	64,093	-2.2
Shetland Islands (9)	13,525	13,702	-1.3	13,525	13,656	-1.0
Western Isles (8)	22,656	26,338	-14.0	22,656	25,571	-11.4
SCOTLAND (291)	2,628,021	2,577,051	2.0	2,628,021	2,636,506	-0.3

Although Scottish Borders experienced the highest visit increases for July 2002/2001, when 2002's figures are compared with year 2000 the area shows a decline in visits of -2.2%. The impact of the launch of both Scotland's first National Park around Loch Lomond and the Trossachs and Loch Lomond Shores has influenced increases in visitation to the Argyll, Islands, Loch Lomond, Stirling & Trossachs region during July. An operator located in the area reported that they now apply a different method of counting visits to provide a more realistic calculation. The Highlands of Scotland experienced the sharpest decline in visits for the period July 2002/2000.

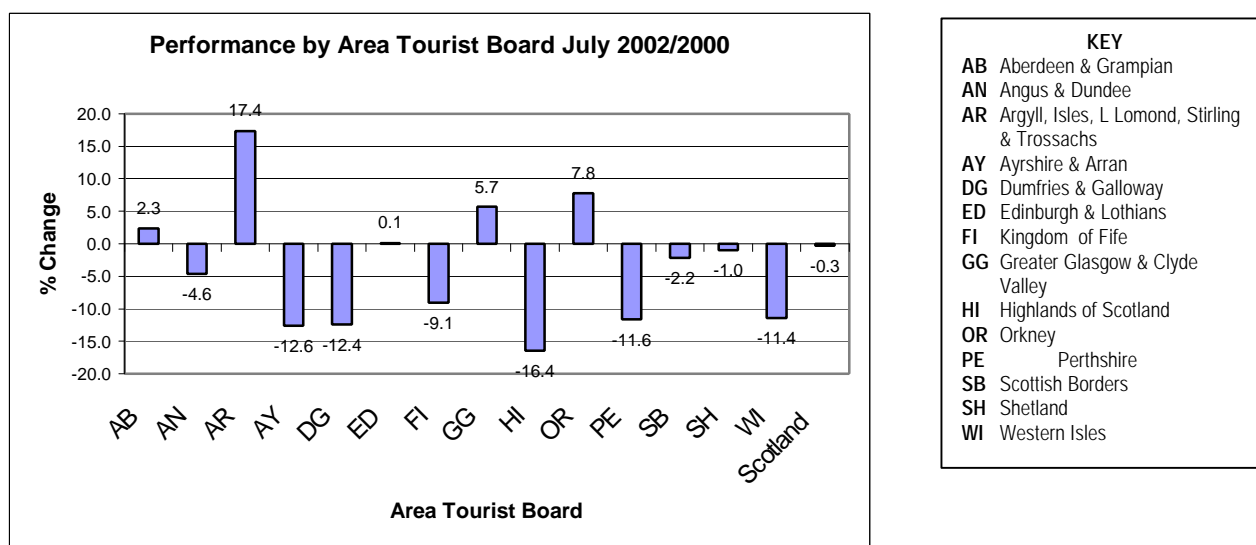
3.2 Performance By Area Tourist Board: January-July 2002/2001 and 2002/2000

The table below provides a comparison of the cumulative changes in visits figures for January to July 2002, 2001 and 2000 for each of the 14 ATBs, and a % comparison year on year.

ATB Areas	Jan-Jul 2002	Jan-Jul 2001	% change on period	Jan-Jul 2002	Jan-Jul 2000	% change on period
Aberdeen and Grampian (37)	1,048,484	993,578	5.5	1,048,484	1,008,189	4.0
Angus and City of Dundee (17)	427,677	440,456	-2.9	427,677	464,941	-8.0
AILLST (34)	1,442,738	1,327,891	8.6	1,442,738	1,415,122	2.0
Ayrshire and Arran (17)	611,580	586,127	4.3	611,580	607,455	0.7
Dumfries and Galloway (24)	301,629	238,306	26.6	301,629	297,738	1.3
Edinburgh and Lothians (29)	2,877,003	2,799,124	2.8	2,877,003	2,803,749	2.6
Kingdom of Fife (21)	296,326	301,568	-1.7	296,326	300,112	-1.3
Greater Glasgow and Clyde Valley (26)	1,870,411	2,094,145	-10.7	1,870,411	1,879,036	-0.5
Highlands of Scotland (20)	584,828	584,609	0.0	584,828	668,520	-12.5
Orkney (14)	193,456	156,462	23.6	193,456	168,229	15.0
Perthshire (16)	437,727	409,484	6.9	437,727	459,198	-4.7
Scottish Borders (19)	264,027	187,657	40.7	264,027	242,479	8.9
Shetland Islands (9)	41,256	41,526	-0.7	41,256	38,678	6.7
Western Isles (8)	64,781	72,438	-10.6	64,781	72,056	-10.1
SCOTLAND (291)	10,461,923	10,233,371	2.2	10,461,923	10,425,502	0.3

The most significant increases were realised by Scottish Borders and Dumfries and Galloway during the period January-July 2002/2001. One Scottish Borders operator accounted significant visit increases to the opening of the Tweed Valley Forest Park, international interest in newly developed world class mountain bike trails and investment in new cafeteria provision. However increases were not so great when visits figures are compared with the same period in 2000. This would suggest recovery from FMD accounted for most increases since last year. Orkney demonstrated high visits increases for July. One operator suggested this was due to Orkney having *'the best weather this summer when compared to most of Scotland'*. The largest losses were suffered during both periods by the Western Isles, with the Highlands breaking even with the same period in 2001 and showing losses when cumulative figures are compared with 2000.

The following chart provides a more visual image of trends that compare July 2002 with 2000.



4.0 PERFORMANCE BY ATTRACTION CATEGORY

4.1 Performance by Attraction Category July 2002/2001 and 2002/2000.

Attraction Category	July 2002	July 2001	% change on month	July 2002	July 2000	% change on month
Castle (51)	518,701	496,626	4.4	518,701	563,197	-7.9
Church/Abbey/Cathedral (19)	73,570	72,013	2.2	73,570	78,849	-6.7
Distillery (12)	77,899	71,932	8.3	77,899	85,002	-8.4
Gardens (18)	177,906	170,399	4.4	177,906	182,805	-2.7
Historic Heritage Site (11)	37,763	42,102	-10.3	37,763	45,155	-16.4
Historic House (31)	165,082	153,690	7.4	165,082	178,832	-7.7
Industrial/ Craft Premises (5)	16,825	16,476	2.1	16,825	16,363	2.8
Interpretation/ Visitor Centre (48)	431,465	450,349	-4.2	431,465	462,515	-6.7
Museum or Art Gallery (66)	705,185	722,439	-2.4	705,185	660,548	6.8
Other (15)	139,549	133,009	4.9	139,549	142,177	-1.8
Wildlife/ Zoo/ Safari Park/ Farm (15)	284,076	248,016	14.5	284,076	221,063	28.5
Total (291)	2,628,021	2,577,051	2.0	2,628,021	2,636,506	-0.3

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

Wildlife/Zoo/Safari Park and Farm related attractions experienced healthy visits increases when July 2002 figures are compared with those of the two previous years. This increase sustains a 6% increase 2002/2000. For the same two periods Historic Heritage sites experienced the largest losses.

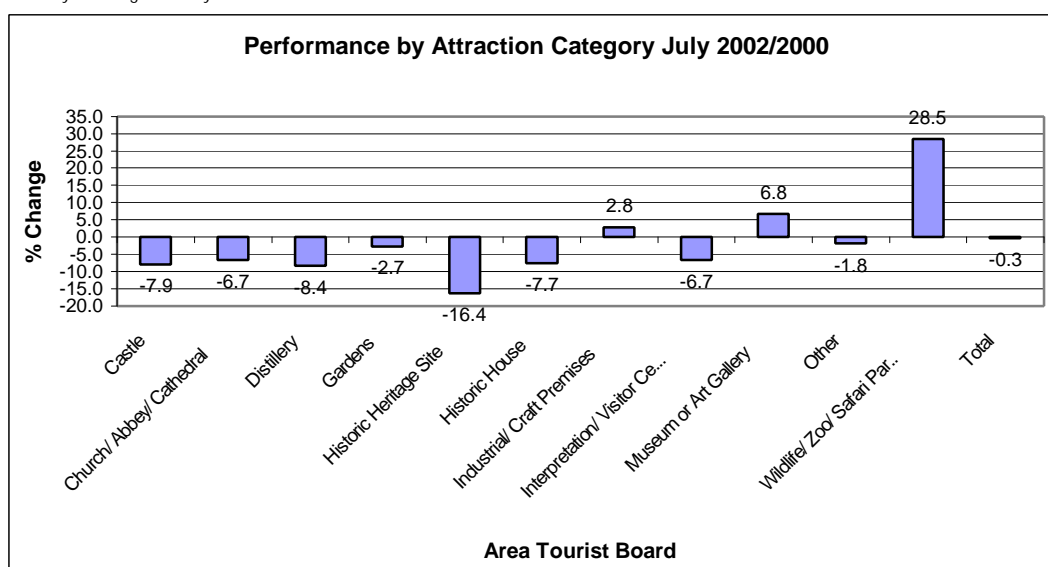
4.2 Performance by Attraction Category January-July 2002/2001 and 2002/2000.

Attraction Category	Jan-July 2002	Jan-July 2001	% change on period	Jan-July 2002	Jan-July 2000	% change on period
Castle (51)	1,803,399	1,652,894	9.1	1,803,399	1,860,232	-3.1
Church/Abbey/Cathedral (19)	234,008	215,946	8.4	234,008	241,642	-3.2
Distillery (12)	282,845	263,519	7.3	282,845	306,577	-7.7
Gardens (18)	764,907	744,115	2.8	764,907	749,135	2.1
Historic Heritage Site (11)	110,405	106,766	3.4	110,405	116,039	-4.9
Historic House (31)	554,864	500,516	10.9	554,864	558,134	-0.6
Industrial/ Craft Premises (5)	95,076	91,382	4.0	95,076	97,748	-2.7
Interpretation/ Visitor Centre (48)	1,603,705	1,584,132	1.2	1,603,705	1,662,900	-3.6
Museum or Art Gallery (66)	3,477,040	3,716,419	-6.4	3,477,040	3,454,870	0.6
Other (15)	569,247	533,994	6.6	569,247	551,262	3.3
Wildlife/ Zoo/ Safari Park/ Farm (15)	966,427	823,688	17.3	966,427	826,963	16.9
Total (289)	10,461,923	10,233,371	2.2	10,461,923	10,425,502	0.3

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

During the January to July season Wildlife/Zoo/Safari Park/Farm attractions have maintained their lead in increased visits for both periods when compared to all other categories.

The following chart shows July 2002 against July 2000.



The above chart shows the prominence of increased visitation to Wildlife/Zoo/Safari Park and Farm attractions. And the increased decline experienced by Historic Heritage Sites.

5.0 PERFORMANCE BY LOCATION

5.1 Performance By Location July 2002/2001 and 2002/2000

Location Category	July 2002	July 2001	% change on month	July 2002	July 2000	% change month
City (47)	1,163,903	1,194,923	-2.6	1,163,903	1,154,779	0.8
Rural (129)	906,109	828,078	9.4	906,109	899,883	0.7
Seaside (54)	205,350	201,360	2.0	205,350	215,985	-4.9
Town (61)	352,659	352,690	0.0	352,659	365,859	-3.6
Total (291)	2,628,021	2,577,051	2.0	2,628,021	2,636,506	-0.3

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

Rural based attractions experienced the highest visit gains since 2001.

Performance by Location January-July 2002/2001 and 2002/2000

Location Category	Jan-July 2002	Jan-July 2001	% change on period	Jan-July 2002	Jan-July 2000	% change on period
City (47)	5,455,445	5,687,577	-4.1	5,455,445	5,500,174	-0.8
Rural (129)	2,902,732	2,495,872	16.3	2,902,732	2,835,243	2.4
Seaside (54)	660,370	652,489	1.2	660,370	667,160	-1.0
Town (61)	1,443,376	1,397,433	3.3	1,443,376	1,422,925	1.4
Total (291)	10,461,923	10,233,371	2.2	10,461,923	10,425,502	0.3

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

When the period January to July 2002 is considered rural areas experience the highest visits increases.

6.0 PERFORMANCE BY VOLUME OF VISITOR NUMBERS

6.1 Performance by Volume of Visits July 2002/2001 and 2002/2000

Volume of visitors per year	July 2002	July 2001	% change on month	July 2002	July 2000	% change on month
Under 20,000 visits (138)	244,541	238,948	2.3	244,541	269,244	-9.2
20,000-49,000 visits (70)	401,494	384,276	4.5	401,494	413,698	-2.9
50,000 visits and over visits (83)	1,981,986	1,953,827	1.4	1,981,986	1,953,564	1.5
Total (291)	2,628,021	2,577,051	2.0	2,628,021	2,636,506	-0.3

Note: Number in brackets indicates the number of attractions recording comparable data.

Attractions recording 20,000 to 49,000 visits account for the highest percent increase in visitation since 2001.

6.2 Performance by Volume of Visits January-July 2002/2000 and 2002/2000

Volume of visitors per year	Jan-July 2002	Jan-July 2001	% change on period	Jan-July 2002	Jan-July 2000	% change on period
Under 20,000 visits (138)	809,350	720,999	12.3	809,350	818,002	-1.1
20,000-49,000 visits (70)	1,388,740	1,196,031	16.1	1,388,740	1,380,307	0.6
50,000 visits and over visits (83)	8,263,833	8,316,341	-0.6	8,263,833	8,227,193	0.4
Total (291)	10,461,923	10,233,371	2.2	10,461,923	10,425,502	0.3

Note: Number in brackets indicates the number of attractions recording comparable data.

Most visits gains for the period January to July are recorded by smaller attractions of under 50,000 visits since 2001.

7.0 PERFORMANCE BY ADMISSION TYPE
7.1 Performance by Admission Type July 2002/2001 and 2002/2000

Type	July 2002	July 2001	% change on month	July 2002	July 2000	% change on month
Free Admission Attractions (121)	1,363,961	1,292,632	5.5	1,363,961	1,235,586	10.4
Paid Admission Attractions (170)	1,264,060	1,284,419	-1.6	1,264,060	1,400,920	-9.8
Total (291)	2,628,021	2,577,051	2.0	2,628,021	2,636,506	-0.3

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

Free admission attractions recorded the highest gains for July when compared to losses being recorded by paid admission attractions.

7.2 Performance by Admission Type January-July 2002/2001 and 2002/2000

Type	Jan-July 2002	Jan-July 2001	% change on period	Jan-July 2002	Jan-July 2000	% change on period
Free Admission Attractions (121)	5,892,761	5,953,063	-1.0	5,892,761	5,739,041	2.7
Paid Admission Attractions (170)	4,569,162	4,280,308	6.7	4,569,162	4,686,461	-2.5
Total (291)	10,461,923	10,233,371	2.2	10,461,923	10,425,502	0.3

Note: Number in brackets indicates the number of visitor attractions per admission type

Most gains were recorded by paid admission attractions since last year. Comparative analysis between January to July 2002 and 2000 shows free attractions experiencing modest gains in visits.

8.0 PERFORMANCE BY LOCAL ENTERPRISE COMPANY (LEC) AREA
8.1 Performance by LEC area July 2002/2001 and 2002/2000

LEC Area	July 2002	July 2001	% change on period	July 2002	July 2000	% change on period
Argyll & the Islands (13)	71,868	70,277	2.3	71,868	73,541	-2.3
Ayrshire (15)	125,556	140,233	-10.5	125,556	144,723	-13.2
Borders (19)	62,701	49,601	26.4	62,701	64,093	-2.2
Caithness & Sutherland (3)*	12,387	12,662		12,387	15,303	
Dumfries & Galloway (24)	85,355	85,783	-0.5	85,355	97,419	-12.4
Dunbartonshire (2)*	9,104	7,974		9,104	7,931	
Edinburgh & Lothians (29)	643,508	633,504	1.6	643,508	642,806	0.1
Fife (21)	92,877	92,388	0.5	92,877	102,120	-9.1
Forth Valley (20)	364,050	295,538	23.2	364,050	300,401	21.2
Glasgow (14)	333,075	355,292	-6.3	333,075	309,095	7.8
Grampian (25)	198,595	200,881	-1.1	198,595	190,316	4.4
Inverness & Nairn (7)	103,320	95,883	7.8	103,320	112,318	-8.0
Lanarkshire (5)	17,214	14,716	17.0	17,214	14,648	17.5
Lochaber (3)*	15,269	32,033		15,269	34,749	
Moray, Badenoch & Strathspey (13)	102,799	95,881	7.2	102,799	102,053	0.7
Orkney (14)	72,505	65,737	10.3	72,505	67,277	7.8
Renfrewshire (7)	15,281	20,838	-26.7	15,281	22,189	-31.1
Ross & Cromarty (3)*	23,885	23,481		23,885	27,027	
Shetland (9)	13,525	13,702	-1.3	13,525	13,656	-1.0
Skye & Lochalsh (3)*	23,429	24,617		23,429	30,294	
Tayside (34)	219,062	219,692	-0.3	219,062	238,976	-8.3
Western Isles (8)	22,656	26,338	-14.0	22,656	25,571	-11.4
Total (291)	2,628,021	2,577,051	2.0	2,628,021	2,636,506	-0.3

Note: Number in brackets indicates the number of attractions providing comparable data

The above table shows significant visits increases in the Borders and Forth Valley since last year. The Forth Valley maintain this increase when figures are compared with year 2000.

8.2 Performance by LEC area January-July 2002/2001 and 2002/2000

LEC Area	Jan-July 2002	Jan-July 2001	% change on month	Jan-July 2002	Jan-July 2000	% change on period
Argyll & the Islands (13)	238,900	224,390	6.5	238,900	228,986	4.3
Ayrshire (15)	570,192	546,107	4.4	570,192	563,829	1.1
Borders (19)	264,027	187,657	40.7	264,027	242,479	8.9
Caithness & Sutherland (3)*	31,343	32,795		31,343	37,250	
Dumfries & Galloway (24)	301,629	238,306	26.6	301,629	297,738	1.3
Dunbartonshire (2)*	26,771	26,754		26,771	24,551	
Edinburgh & Lothians (29)	2,877,003	2,799,124	2.8	2,877,003	2,803,749	2.6
Fife (21)	296,326	301,568	-1.7	296,326	300,112	-1.3
Forth Valley (20)	1,206,044	1,105,561	9.1	1,206,044	1,194,051	1.0
Glasgow (14)	1,699,170	1,923,283	-11.7	1,699,170	1,692,116	0.4
Grampian (25)	725,825	705,544	2.9	725,825	708,929	2.4
Inverness & Nairn (7)	312,276	285,332	9.4	312,276	335,638	-7.0
Lanarkshire (5)	84,686	75,225	12.6	84,686	76,753	10.3
Lochaber (3)*	38,590	81,404		38,590	92,289	
Moray, Badenoch & Strathspey (13)	395,017	343,504	15.0	395,017	355,842	11.0
Orkney (14)	193,456	156,462	23.6	193,456	168,229	15.0
Renfrewshire (7)	86,555	95,637	-9.5	86,555	110,167	-21.4
Ross & Cromarty (3)*	57,583	58,662		57,583	67,878	
Shetland (9)	41,256	41,526	-0.7	41,256	38,678	6.7
Skye & Lochalsh (3)*	72,678	70,946		72,678	78,883	
Tayside (34)	877,815	861,146	1.9	877,815	935,299	-6.1
Western Isles (8)	64,781	72,438	-10.6	64,781	72,056	-10.1
Total (291)	10,461,923	10,233,371	2.2	10,461,923	10,425,502	0.3

Note: Number in brackets indicates the number of attractions providing comparable data

The above table shows that Orkney and the Borders recorded the highest level of increases during the period January to July 2002 and 2000.

9.0 CONCLUSION

In summary attractions under 50,000 visits, those based in a rural location and those coming under the Wildlife/Zoo/Farm category experienced the highest visit gains during July.

The opening of major new attractions, special events and exhibitions have also been linked with increasing visitation. The most repeated comments expressed by operators are epitomised in the following quotes:

'Very bad, wet weather in July kept numbers low.'

'July has been very patchy at times due to poor weather. This year we have enjoyed a noticeable increase in larger groups, particularly from the USA.'

'More Americans around accounting for good sales'