

2003 SCOTTISH VISITOR ATTRACTION BAROMETER July 2003 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 contacting 401 attractions. If you have any comments or suggestions on this report, please contact Norin Arshed (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: n.arshed@gcal.ac.uk).

2.0 JULY 2003/2002 AND JANUARY - JULY 2003/2002

Summary

This Barometer compares the period of July 2003 with July 2002. It is based on contacting 401 visitor attractions in Scotland. Some 368 attraction operators provided figures for the month of July 2003, a response rate of 92%. The visitor figures recorded can be compared with data collected in year 2002. No estimated figures have been used for this Barometer to give a more accurate analysis. 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).

The following table shows total visits recorded for July 2003/2002 and Jan-July 2003/2002 as well as the % change calculation.

Attractions	Jul-03	Jul-02	% Change	Jan-Jul03	Jan-Jul02	% Change
368	2,474,520	2,426,965	2.0	9,845,841	9,773,236	0.7

The total number of visits representing the 368 barometer attractions in Scotland for the period July 2003 was **2,474,520**. When compared to comparable data from the previous year of **2,426,965** visits, this shows a visits increase of **2.0%**. When the total visits figure for 2003 of **9,845,841** is compared with year 2002's total visits figure of **9,773,236**, performance for year 2003 shows an increase in visits of **0.7%**. A further breakdown is shown below, where the months of January-July 2003 can be compared with January-July 2002 with their % change calculations.

Attractions	Month	Visits	Month	Visit	% Change
368	Jan-03	566,181	Jan-02	552,602	2.5
	Feb-03	737,397	Feb-02	721,719	2.2
	Mar-03	902,939	Mar-02	1,043,447	-13.5
	Apr-03	1,610,184	Apr-02	1,444,063	11.5
	May-03	1,614,291	May-02	1,610,359	0.2
	Jun-03	1,940,329	Jun-02	1,974,081	-1.7
	Jul-03	2,474,520	Jul-02	2,426,965	2.0

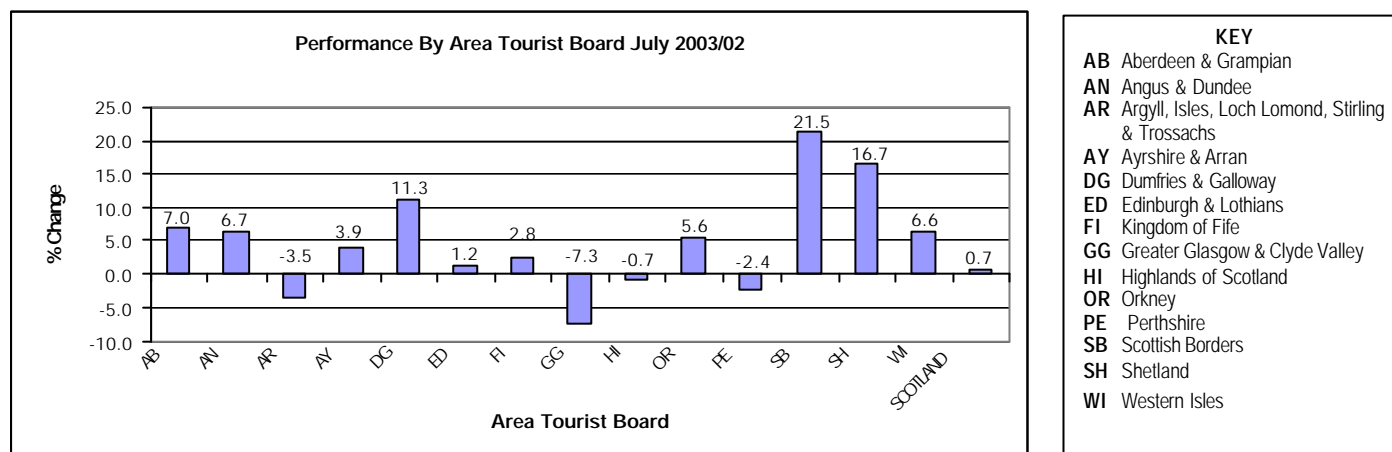
The highest increase in visits recorded by ATB area in July were experienced in the Aberdeen and Grampian (12.8%), Ayrshire and Arran (12.0%) and Dumfries and Galloway (11.8%). Perthshire showed the largest decrease in visits during the same period with a decline of -9.5%. Greater Glasgow saw a decline on visit figures (-5.3%) with a total of 18,741 less visitors in June 2003. During the month of June 2003 the highest increases in visits were recorded by Interpretation/Visitor Centres (13.5%), Gardens (12.8%) and the Wildlife/ Zoo/ Safari Park/ Farm category (10.9%). The Historic House category saw a decline in visits of -12.6%, followed by the Museum or Art Gallery category with -5.7% and the Industrial/Craft Premises category experiencing a decrease of -3.6%.

The greatest increases in visits were experienced by attractions located in Seaside areas (10.4%) followed by Rural areas (8.4%). The highest decrease in visits were in the City area where the visit figures declined by -3.1%. Attractions achieving volume of 1-19,999 visits experienced an increase of 13.6%. Both the Free and Paid admissions for the month of July experienced an increase in visits, 1.2% and 2.6%, respectively. The highest increases in visits by LEC area were experienced by attractions in Caithness and Sutherland (30.4%), Renfrewshire (18.6%) and Lochaber (17.8%). Skye and Lochalsh experienced the largest decrease in visits of -17.4%, followed by Glasgow decreased with -7.0% and Edinburgh and Lothian with -5.0%.

3.0 PERFORMANCE BY AREA TOURIST BOARD
Performance by Area Tourist Board – July 2003/2002 and January-July 2003/2002

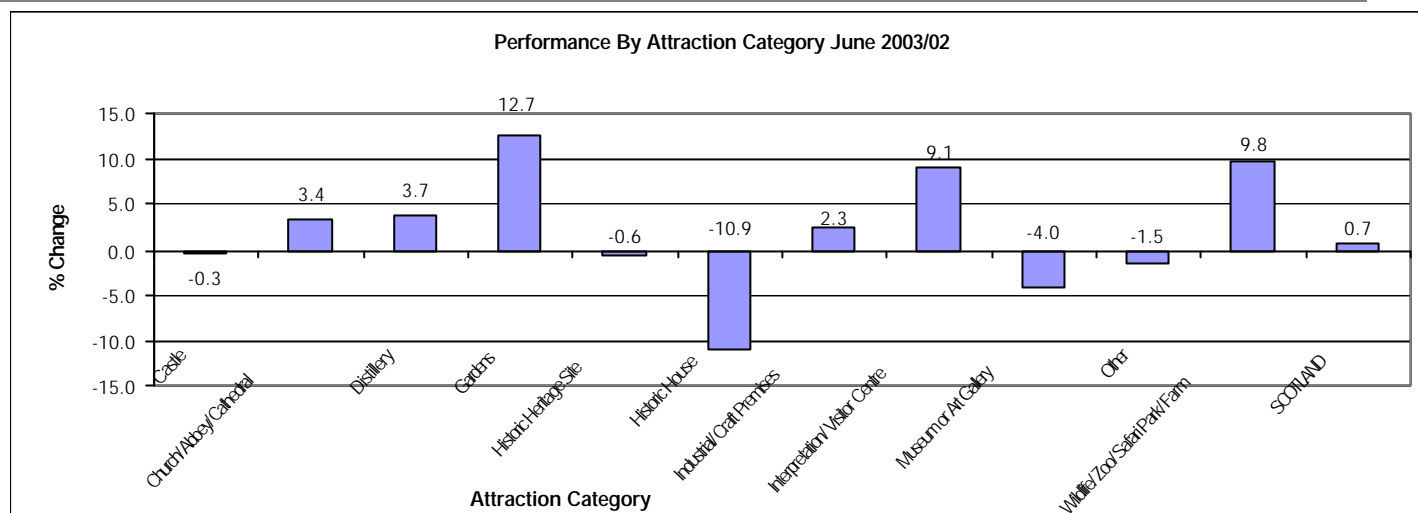
ATB Area	Jul-03	Jul-02	% Change	Jan-Jul03	Jan-Jul02	% Change
Aberdeen and Grampian (48)	272,470	241,495	12.8	938,723	877,362	7.0
Angus and City of Dundee (19)	90,700	87,898	3.2	426,909	400,280	6.7
ALLST (39)	336,467	323,603	4.0	1,197,886	1,241,194	-3.5
Ayrshire and Arran (15)	131,944	117,805	12.0	444,276	427,491	3.9
Dumfries and Galloway (33)	99,664	89,146	11.8	349,429	313,879	11.3
Edinburgh and Lothian (42)	560,330	589,554	-5.0	2,621,824	2,589,784	1.2
Kingdom of Fife (21)	93,955	93,056	1.0	305,634	297,266	2.8
Greater Glasgow (39)	332,131	350,872	-5.3	1,692,692	1,826,261	-7.3
Highlands of Scotland (35)	271,826	253,094	7.4	882,585	888,892	-0.7
Orkney (15)	78,462	72,755	7.8	205,032	194,162	5.6
Perthshire (15)	88,827	98,162	-9.5	320,087	327,855	-2.4
Scottish Borders (26)	77,232	70,836	9.0	339,472	279,384	21.5
Shetland Islands (13)	18,459	17,746	4.0	53,998	46,280	16.7
Western Isles (8)	22,053	20,943	5.3	67,294	63,146	6.6
SCOTLAND (368)	2,474,520	2,426,965	2.0	9,845,841	9,773,236	0.7

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


4.0 PERFORMANCE BY ATTRACTION CATEGORY
Performance by Attraction Category – July 2003/2002 and January-July 2003/2002

Attraction Category	JuI-03	JuI-02	% Change	Jan-Jul03	Jan-Jul02	% Change
Castle (51)	480,772	474,395	1.3	1,675,144	1,680,306	-0.3
Church/ Abbey/ Cathedral (10)	34,424	35,465	-2.9	107,528	103,983	3.4
Distillery (9)	24,997	22,758	9.8	79,017	76,190	3.7
Gardens (23)	206,286	182,876	12.8	889,594	789,581	12.7
Historic Heritage Site (21)	88,595	86,167	2.8	244,868	246,322	-0.6
Historic House (31)	119,829	137,156	-12.6	393,741	442,100	-10.9
Industrial/ Craft Premises (10)	29,583	30,676	-3.6	139,311	136,138	2.3
Interpretation/ Visitor Centre (61)	412,200	363,192	13.5	1,456,980	1,335,373	9.1
Museum or Art Gallery (117)	702,985	745,364	-5.7	3,385,290	3,526,834	-4.0
Other (25)	218,911	208,300	5.1	897,878	911,596	-1.5
Wildlife/ Zoo/ Safari Park/ Farm (10)	155,938	140,616	10.9	576,490	524,813	9.8
SCOTLAND (368)	2,474,520	2,426,965	2.0	9,845,841	9,773,236	0.7

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



5.0 PERFORMANCE BY LOCATION

Performance by Location – July 2003/2002 and January-July 2003/2002

Location Category	Jul-03	Jul-02	% Change	Jan-Jul03	Jan-Jul02	% Change
City (62)	1,058,870	1,093,153	-3.1	4,969,100	5,065,949	-1.9
Rural (158)	868,222	801,276	8.4	2,912,035	2,779,712	4.8
Seaside (51)	179,494	162,543	10.4	528,474	490,932	7.6
Urban (97)	367,934	369,993	-0.6	1,436,232	1,436,643	0.0
SCOTLAND (368)	2,474,520	2,426,965	2.0	9,845,841	9,773,236	0.7

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 2003/2002 and January-July 2003/2002

Range of Volume of Visits	Jul-03	Jul-02	% Change	Jan-Jul03	Jan-Jul02	% Change
1 - 19,999 (225)	378,569	333,117	13.6	1,223,294	1,112,125	10.0
20,000 - 49,999 (68)	392,923	373,529	5.2	1,402,683	1,308,924	7.2
50,000 + (75)	1,703,028	1,720,319	-1.0	7,219,864	7,352,187	-1.8
SCOTLAND (368)	2,474,520	2,426,965	2.0	9,845,841	9,773,236	0.7

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 2003/2002 and January-July 2003/2002

Type	Jul-03	Jul-02	% Change	Jan-Jul03	Jan-Jul02	% Change
Free (157)	1,125,321	1,112,292	1.2	5,065,737	4,980,069	1.7
Paid (211)	1,349,199	1,314,673	2.6	4,780,104	4,793,167	-0.3
SCOTLAND (368)	2,474,520	2,426,965	2.0	9,845,841	9,773,236	0.7

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

7.0 PERFORMANCE BY LOCAL ENTERPRISE COMPANY (LEC) AREA**Performance by LEC Area – July 2003/2002 and January-July 2003/2002**

LEC Area	Jul-03	Jul-02	% Change	Jan-Jul03	Jan-Jul02	% Change
Argyll & The Islands (16)	86,859	75,179	15.5	303,239	264,899	14.5
Ayrshire (14)	123,168	110,668	11.3	418,607	406,882	2.9
Borders (26)	77,232	70,836	9.0	339,472	279,384	21.5
Caithness & Sutherland (7)	20,334	15,591	30.4	48,184	40,946	17.7
Dumfries & Galloway (33)	99,664	89,146	11.8	349,429	313,879	11.3
Dunbartonshire *	27,010	34,445		157,395	184,339	
Edinburgh & Lothian (42)	560,330	589,554	-5.0	2,621,824	2,589,784	1.2
Fife (21)	93,955	93,056	1.0	305,634	297,266	2.8
Forth Valley (22)	251,301	243,170	3.3	895,493	957,722	-6.5
Glasgow (18)	261,182	280,694	-7.0	1,324,812	1,442,567	-8.2
Grampian (35)	228,174	196,345	16.2	774,372	709,225	9.2
Inverness & Nairn (8)	127,603	126,171	1.1	407,772	485,396	-16.0
Lanarkshire (12)	36,570	31,542	15.9	149,120	149,782	-0.4
Lochaber (7)	53,176	45,151	17.8	180,621	147,689	22.3
Moray, Badenoch & Strathspey (16)	76,168	78,285	-2.7	297,598	297,978	-0.1
Orkney (15)	78,462	72,755	7.8	205,032	194,162	5.6
Renfrewshire (8)	15,765	13,295	18.6	87,449	76,344	14.5
Ross & Cromarty (5)	29,069	27,174	7.0	78,834	63,485	24.2
Shetland (13)	18,459	17,746	4.0	53,998	46,280	16.7
Skye & Lochalsh (4)	4,853	5,872	-17.4	18,387	21,535	-14.6
Tayside (35)	183,133	189,347	-3.3	761,275	740,546	2.8
Western Isles (8)	22,053	20,943	5.3	67,294	63,146	6.6
SCOTLAND (368)	2,474,520	2,426,965	2.0	9,845,841	9,773,236	0.7

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 July 2003.

Reasons for positive impacts on visitor figures:-

General increase in visitors caused possibly by better weather and/or more effective marketing.

Better weather this month. Majority of the visitors from Scotland.

The exhibition we currently have on show is more of a crowd-puller than the exhibition that was on last year.

Increase in family visits over last year.

Attracting more coach parties as we have dropped the entry charge.

New staff recording the figures more accurately (some are recorded manually) which confirms the general increase in our visitors.

The Island is very very busy this year mainly due to the "Balamory" hysteria which seems to have gripped the country! In case you are not aware "Balamory" is a children's programme that is broadcast on BBC1 every week day and is mainly recorded and filmed in Tobermory.

Reasons for negative impacts in visitor figures:-

Not many English tourists and overseas visitors as before, although the main visitors are from home.

Very hot weather affected our visitor numbers (adversely) as no-one wanted to be inside.

Considerable decrease, lack of signposting and lack of knowledge about the castle.

Advertising was cut back this year. There are plans to close the Museum at the end of September, to move it to a new location and possibly re-open it next year.

We have been subject to a number of group booking cancellations.