

**2004 SCOTTISH VISITOR ATTRACTION BAROMETER
OCTOBER 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 486 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 October 2004 with October 2003. It is based on 488 visitor attractions in Scotland. Some 406 attraction operators provided figures for the month of October 2004 with a response rate of 83%.

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 OCTOBER 2004/2003 AND JANUARY – OCTOBER 2004/2003

Summary

The total number of visits for the responding 406 barometer attractions in Scotland for the period January-October 2004 was 16,722,336. When compared to data from the previous year of 16,519,186 visits, this shows a visits increase of 1.2%. The total number of visits representing the 406 barometer attractions in Scotland for the period October 2004 was 1,377,481. When compared to comparable data from the previous year of 1,365,518 visits, this shows a visits increase of 0.9%.

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

Attractions	Oct-04	Oct-03	% Change	Jan-Oct04	Jan-Oct03	% Change
406	1,377,481	1,365,518	0.9	16,722,336	16,519,186	1.2

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

Attractions	Months	Visits	Months	Visits	% Change
406	Jan-04	597,090	Jan-03	568,479	5.0
	Feb-04	800,935	Feb-03	767,423	4.4
	Mar-04	974,583	Mar-03	972,915	0.2
	Apr-04	1,671,961	Apr-03	1,669,977	0.1
	May-04	1,772,408	May-03	1,717,559	3.2
	Jun-04	2,114,773	Jun-03	2,125,251	-0.5
	Jul-04	2,698,036	Jul-03	2,599,736	3.8
	Aug-04	2,868,477	Aug-03	3,024,098	-5.1
	Sep-04	1,846,592	Sep-03	1,708,230	8.1
	Oct-04	1,377,481	Oct-03	1,365,518	0.9

The highest percentage increase in visits recorded by ATB area in October were experienced in the Scottish Borders (16.4%), the Western Isles (16.2%) and Dumfries & Galloway (8.7%). The Shetland Islands showed the largest decrease in visits during the same period with a decline of -31.4%, followed by Kingdom of Fife with a decrease of -19.1%. During the month of October 2004 the highest increases in visits were recorded by the Transport Related category (24.2%), Wildlife/ Zoo/ Safari Park/ Farm (10.8%) and the Museum or Art Gallery category (10.4%). The Distillery category saw a decline in visits of -23.1%, followed by the Interpretation/Visitor Centre category with a decrease of -7.0%.

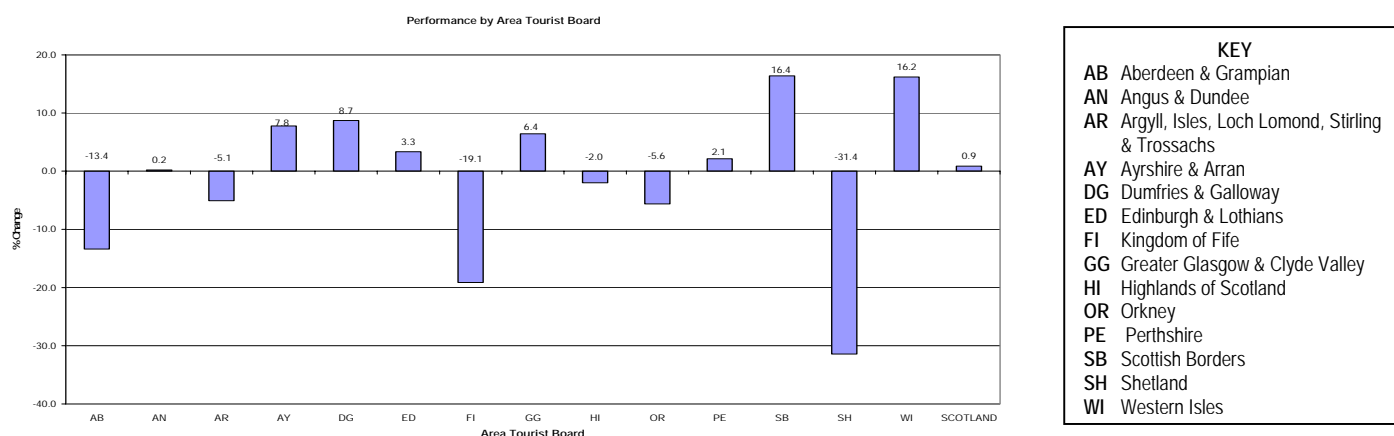
Visitor figures by location saw an increase in the Urban category (1.7%) and declines in the Rural and Seaside categories of -0.3 and -1.8%, respectively. The 50,000+ range of volume of visits, had the highest increase in visits at 3.4%. Free admissions saw an increase in visits of 1.7%. The highest increases in visits by LEC area were experienced by Glasgow (18.4%) and the Borders (16.4%). Shetland experienced the largest decrease in visits of -31.4%, followed by Lanarkshire with a decrease of -19.7%.

3.0 PERFORMANCE BY AREA TOURIST BOARD

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

ATB Area	Oct-04	Oct-03	% Change	Jan-Oct04	Jan-Oct03	% Change
Aberdeen and Grampian (54)	118,278	136,570	-13.4	1,525,016	1,587,247	-3.9
Angus and City of Dundee (21)	59,990	59,867	0.2	638,244	672,017	-5.0
AILLST (36)	94,089	99,130	-5.1	1,320,936	1,358,050	-2.7
Ayrshire and Arran (16)	66,670	61,859	7.8	791,045	804,709	-1.7
Dumfries and Galloway (33)	37,679	34,665	8.7	518,263	508,507	1.9
Edinburgh and Lothian (33)	228,034	220,673	3.3	2,956,366	2,791,484	5.9
Kingdom of Fife (24)	38,994	48,220	-19.1	581,941	644,467	-9.7
Greater Glasgow (48)	396,691	372,743	6.4	4,177,605	4,041,103	3.4
Highlands of Scotland (53)	190,458	194,295	-2.0	2,345,498	2,340,142	0.2
Orkney (14)	10,422	11,044	-5.6	324,936	318,599	2.0
Perthshire (23)	68,864	67,423	2.1	814,885	763,420	6.7
Scottish Borders (29)	61,049	52,456	16.4	570,991	534,653	6.8
Shetland Islands (14)	1,978	2,885	-31.4	84,604	79,519	6.4
Western Isles (8)	4,285	3,688	16.2	72,006	75,269	-4.3
SCOTLAND (406)	1,377,481	1,365,518	0.9	16,722,336	16,519,186	1.2

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

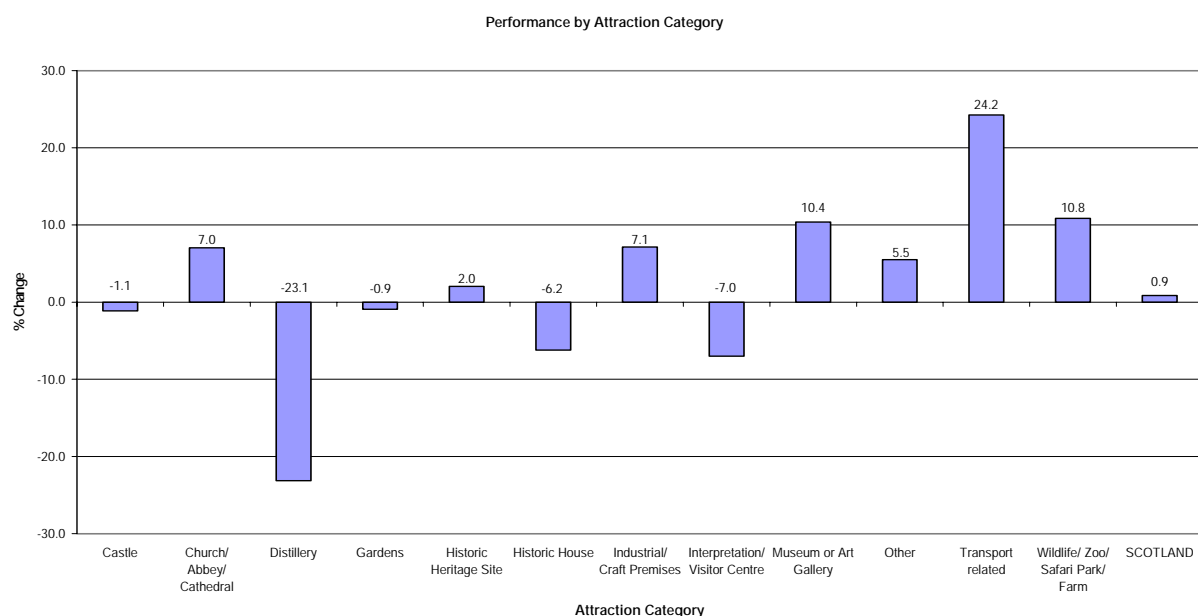


4.0 PERFORMANCE BY ATTRACTION CATEGORY

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

Attraction Category	Oct-04	Oct-03	% Change	Jan-Oct04	Jan-Oct03	% Change
Castle (58)	205,195	207,560	-1.1	3,208,283	3,199,216	0.3
Church/ Abbey/ Cathedral (14)	41,992	39,237	7.0	649,754	591,909	9.8
Country Park*	105,102	116,597	-9.9	1,377,194	1,397,209	-1.4
Distillery (21)	32,929	42,847	-23.1	422,651	396,367	6.6
Gardens (26)	97,421	98,335	-0.9	1,347,692	1,367,995	-1.5
Historic Heritage Site (20)	12,202	11,959	2.0	378,945	375,176	1.0
Historic House (35)	55,309	58,974	-6.2	739,293	743,564	-0.6
Industrial/ Craft Premises (15)	33,756	31,506	7.1	314,150	305,259	2.9
Interpretation/ Visitor Centre (58)	202,213	217,435	-7.0	2,311,661	2,424,353	-4.6
Monument*	959	959	0.0	20,615	21,193	-2.8
Museum or Art Gallery (112)	401,394	363,665	10.4	3,968,819	3,742,991	6.0
Other (22)	153,206	145,216	5.5	1,522,629	1,518,747	0.3
Transport Related (7)	11,036	8,883	24.2	143,079	118,009	21.2
Wildlife/ Zoo/ Safari Park/ Farm (12)	24,767	22,345	10.8	317,571	317,198	0.1
SCOTLAND (406)	1,377,481	1,365,518	0.9	16,722,336	16,519,186	1.2

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



5.0 PERFORMANCE BY LOCATION

Performance by Location – October 2004/2003 and January-October 2004/2003

Performance by Location	Oct-04	Oct-03	% Change	Jan-Oct04	Jan-Oct03	% Change
Rural (193)	440,608	441,843	-0.3	5,603,246	5,681,147	-1.4
Seaside (59)	79,917	81,411	-1.8	1,240,266	1,214,581	2.1
Urban (154)	856,956	842,264	1.7	9,878,824	9,623,458	2.7
SCOTLAND (406)	1,377,481	1,365,518	0.9	16,722,336	16,519,186	1.2

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

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – October 2004/2003 and January-October 2004/2003

Range of Volume of Visits	Oct-04	Oct-03	% Change	Jan-Oct04	Jan-Oct03	% Change
1 - 19,999 (265)	143,291	169,495	-15.5	2,222,792	2,231,826	-0.4
20,000 - 49,999 (66)	160,269	157,840	1.5	2,141,268	2,162,822	-1.0
50,000 + (75)	1,073,921	1,038,183	3.4	12,358,276	12,124,538	1.9
SCOTLAND (406)	1,377,481	1,365,518	0.9	16,722,336	16,519,186	1.2

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 – October 2004/2003 and January-October 2004/2003

Type	Oct-04	Oct-03	% Change	Jan-Oct04	Jan-Oct03	% Change
Free (154)	740,241	727,561	1.7	8,371,192	8,131,012	3.0
Paid (252)	637,240	637,957	-0.1	8,351,144	8,388,174	-0.4
SCOTLAND (406)	1,377,481	1,365,518	0.9	16,722,336	16,519,186	1.2

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 – October 2004/2003 and January-October 2004/2003

LEC region	Oct-04	Oct-03	% Change	Jan-Oct04	Jan-Oct03	% Change
Argyll & The Islands (22)	31,001	33,980	-8.8	486,682	488,451	-0.4
Ayrshire (14)	62,299	57,187	8.9	738,962	750,280	-1.5
Borders (29)	61,049	52,456	16.4	570,991	534,653	6.8
Caithness & Sutherland (12)	30,817	29,507	4.4	301,429	281,317	7.1
Dumfries & Galloway (33)	37,679	34,665	8.7	518,263	508,507	1.9
Dunbartonshire (5)	69,187	68,777	0.6	676,266	689,291	-1.9
Edinburgh & Lothian (33)	228,034	220,673	3.3	2,956,366	2,791,484	5.9
Fife (24)	38,994	48,220	-19.1	581,941	644,467	-9.7
Forth Valley (13)	63,411	67,756	-6.4	835,764	870,299	-4.0
Glasgow (24)	256,626	216,799	18.4	2,407,971	2,215,553	8.7
Grampian (44)	92,306	104,115	-11.3	1,223,949	1,293,861	-5.4
Inverness & Nairn (11)	61,271	56,731	8.0	796,678	769,298	3.6
Lanarkshire (14)	64,705	80,583	-19.7	1,005,242	1,051,707	-4.4
Lochaber (10)	23,064	25,287	-8.8	301,222	324,707	-7.2
Moray, Badenoch & Strathspey (16)	53,114	58,197	-8.7	557,876	552,431	1.0
Orkney (14)	10,422	11,044	-5.6	324,936	318,599	2.0
Renfrewshire (8)	11,482	11,778	-2.5	146,676	141,835	3.4
Ross & Cromarty (9)	9,845	8,518	15.6	169,932	174,669	-2.7
Shetland (14)	1,978	2,885	-31.4	84,604	79,519	6.4
Skye & Lochalsh (5)	35,216	43,633	-19.3	485,513	502,811	-3.4
Tayside (44)	130,696	129,039	1.3	1,479,067	1,460,178	1.3
Western Isles (8)	4,285	3,688	16.2	72,006	75,269	-4.3
SCOTLAND (406)	1,377,481	1,365,518	0.9	16,722,336	16,519,186	1.2

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 of October 2004 compared to October 2003.

Reasons for positive impacts on visitor figures:-

The spread of English and Scottish holidays over the weeks helped.

Increase in the number of children due to the school holidays.

TV and newspaper coverage.

Increase in non-booked coaches.

Events and activities encouraged the public.

Entry to museum during October free.

Reasons for negative impacts in visitor figures:-

Attractions closing due to the end of the season.

Poor weather.

Lots of rain.

Closed due to maintenance works.

Loss of coaches.

No young families as they are going abroad.

Closed due to difficulties in recruiting/retaining staff.