

Reopening of Scottish Visitor Attractions 2021

Abbreviations

Visitor Attraction Ownership

CT	Charity or Trust
G	Government Department/Agency
HS	Historic Environment Scotland
LA	Local Authority
NTS	The National Trust for Scotland
PLC	Public Limited Company/plc
P	Privately Owned
RO	Religious Organisation
O	Other (e.g. Educational Institutions)

Former VisitScotland Areas

AB	Aberdeen & Grampian
ALLFV/AR	Argyll, Loch Lomond & The Forth Valley
AN	Angus & City of Dundee
AY	Ayrshire & Arran
DG	Dumfries & Galloway
ED	Edinburgh & Lothians
FI	Kingdom of Fife
GG	Greater Glasgow & Clyde Valley
HI	Highlands of Scotland
OR	Orkney
OH	Outer Hebrides
PE	Perthshire
SB	Scottish Borders
SH	Shetland

Category

AA	Activity Attractions
C	Castles/Forts
CR	Scottish Crafts/Retail Attractions
D	Distilleries/Breweries/Wineries
G	Gardens
HC	Heritage Centres
HH	Historic Houses/Palaces
MAG	Museums/Art Galleries (includes Science/Technology Centres)
OHP	Other Historic Properties
ON	Outdoors/Nature Attractions
T	Transport-Related Attractions
WP	Industrial/Workplaces
WS	Places of Worship/Spiritual Attractions
Z	Wildlife/Animal Attractions

Other Abbreviations

MC	Moffat Centre for Travel & Tourism Business Development
NMS	National Museum of Scotland
NNR	National Nature Reserve
VAB	Visitor Attraction Barometer
VAM	Visitor Attraction Monitor
VS	VisitScotland

CONTENTS

1	Project Brief.....	4
1.1.	Aims and Objectives	4
1.2.	Background	4
1.3.	Methodology	5
2	SURVEY DATA ANALYSIS.....	6
2.1.1	Responding sample	6
2.2.	Attraction Information	6
2.2.1	Attractions Reopening in 2021	6
2.2.2	Attractions Not Reopening in 2021	8
2.2.3	Reason for not Reopening.....	9
2.2.4	Date Opened/Reopening	10
2.2.5	Type of Opening.....	11
2.2.6	Partial Reopening – What will it look like?	12
2.2.7	Fully Reopening	13
2.2.8	Number of Attractions open per month in 2021	14
2.2.9	Online Booking & E-Ticketing Facilities.....	15
2.2.10	Catering & Retail Facilities.....	16
2.2.11	Catering Facilities – Initial Plan	17
2.2.12	Retail Facilities – Initial Plan	18
2.2.13	Location of Attractions by VisitScotland Region	19
2.2.14	Attraction Category	20

2.2.15	Paid & Free Attractions	21
2.2.16	Geographical Location of Attractions	22
2.2.17	Volume of Visits	23
2.2.18	Location of Attractions by Local Authority Area	24
2.2.19	List by Status of Scottish Visitor Attractions in 2021	26
2.3.	Additional Analysis	36
2.3.1	Scottish Visitor Attraction Monitor 2019 - Overview	36
2.3.2	Scottish Visitor Attraction Barometer: February 2021 - Overview	37

1 PROJECT BRIEF

1.1. Aims and Objectives

The project aims to provide visitor attraction intelligence on the reopening of Scottish visitor attractions in 2021 following the decimation of tourism by COVID-19 in 2020 by:

- Undertaking visitor attraction interviews using an online questionnaire
- Analysing the captured data
- Producing a report of findings to include tabular and graphical representations.

1.2. Background

Coronavirus (COVID-19) has had a significant impact on the Scottish Tourism industry with the vast majority of Visitor Attractions closing in Mid-March 2020. With the announcement by the First Minister, Nicola Sturgeon, of the date 26th April for the reopening of the tourism industry, the Moffat Centre and ASVA asked all Scottish attractions to complete a brief survey to provide data on anticipated reopening.

1.3. Methodology

A research tool in the form of a questionnaire was designed in collaboration with ASVA. A link to an online survey was sent out by email to all Scottish visitor attractions, at the beginning of April 2021. The following sections of the report present the findings graphically and in tabular format.

2 SURVEY DATA ANALYSIS

2.1.1 Responding sample

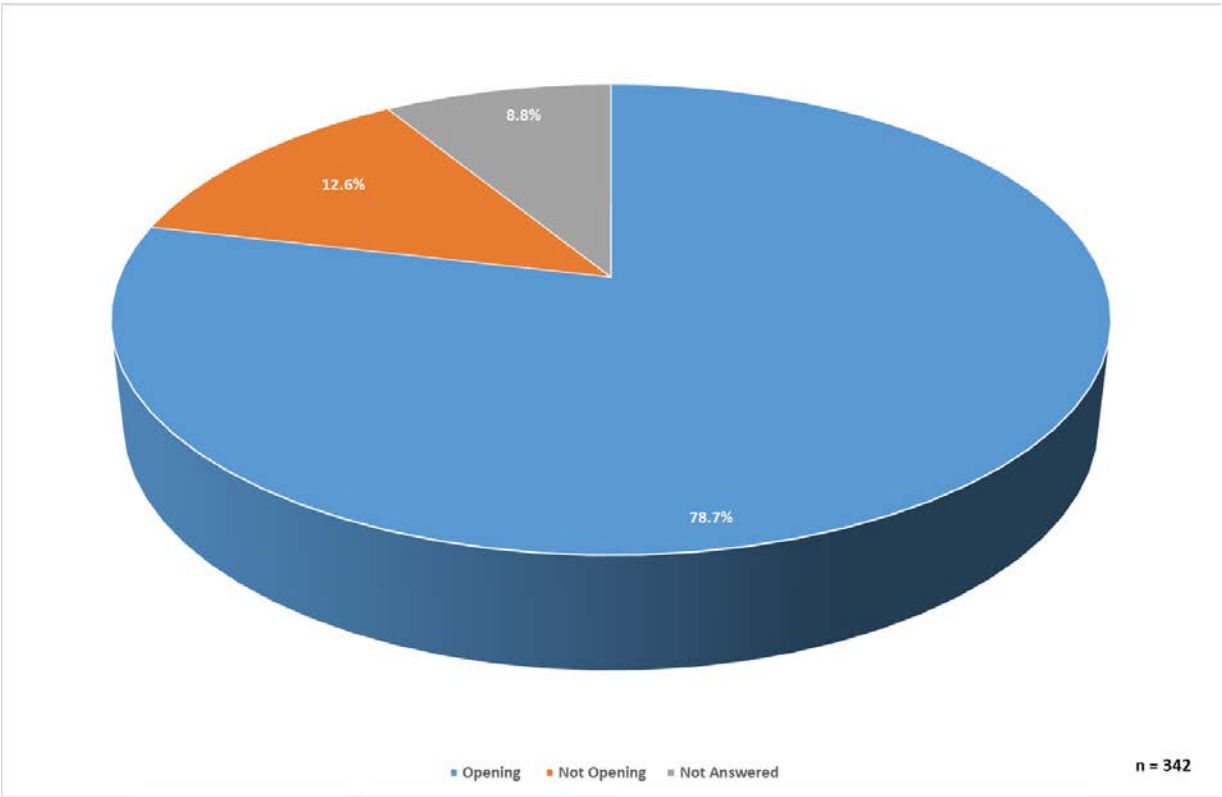
The online survey was sent out by email to 688 Scottish visitor attractions with respondents being asked to provide data concerning the reopening of their attraction, a total of 342 surveys were completed over nine days in April 2021, this equates to a 49.7% response rate.

2.2. Attraction Information

2.2.1 Attractions Reopening in 2021

Figure 2.1 below presents the 'current/planned reopening status' of all respondents. The majority of respondents (78.7%) stated that their attraction was currently open or planned to reopen in 2021, with just under 9% not able to confirm their plans to open.

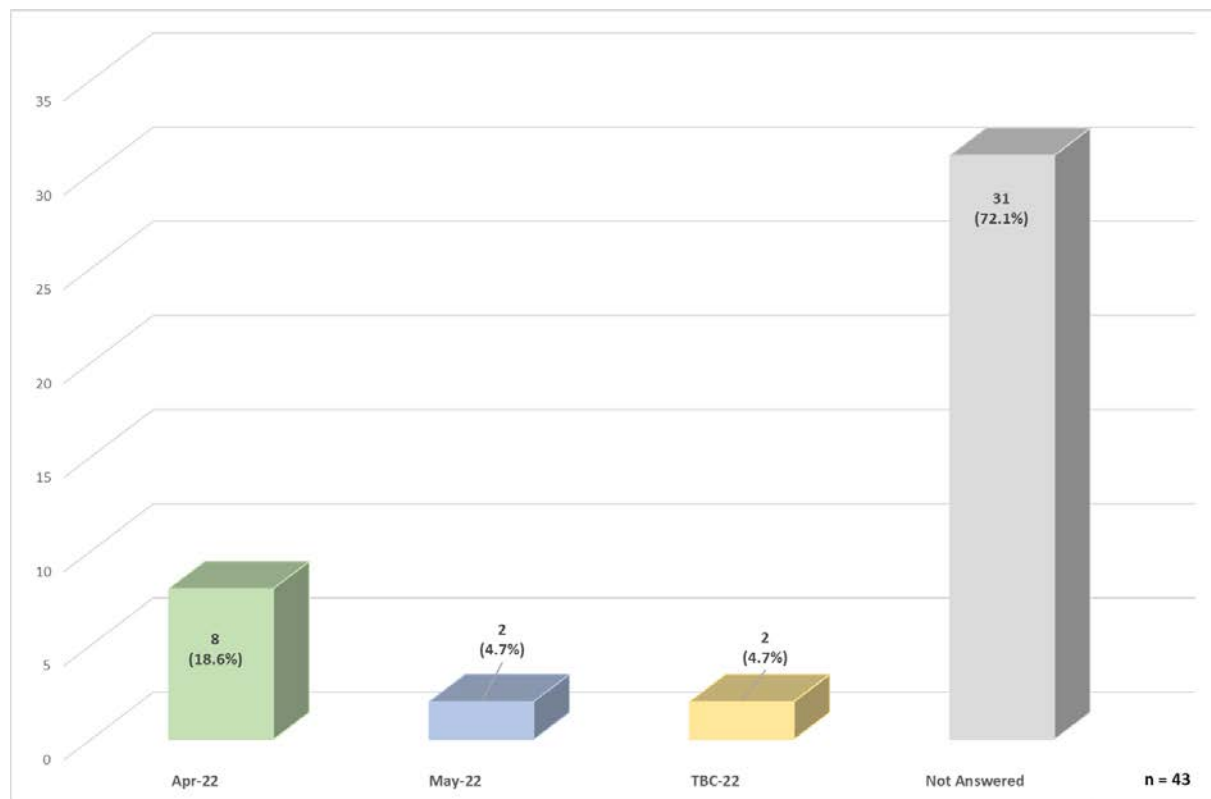
Figure 2.1 Attraction Reopening in 2021



2.2.2 Attractions Not Reopening in 2021

The 43 respondents who stated that they would not reopen in 2021 were asked when they planned to reopen, if known. Figure 2.1 below shows that 18.6% believe they will be open in April 2022, however over 70% were unable to give an exact month/year.

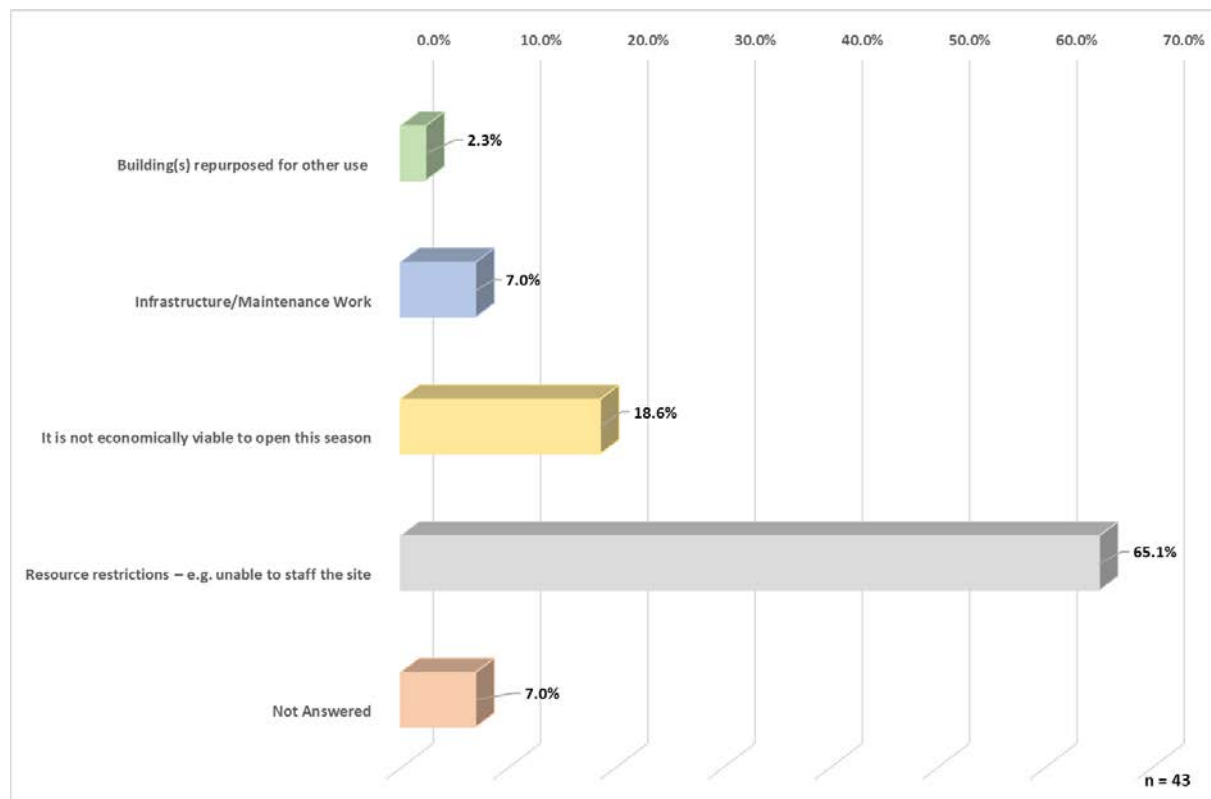
Figure 2.2 Predicted dates for reopening in 2022 for Attractions unable to open in 2021



2.2.3 Reason for not Reopening

Just under two-thirds of respondents stated that they could not reopen in 2021 due to 'Resource restrictions – e.g. unable to staff the site', with just under a fifth believing it not to be economically viable to open in 2021.

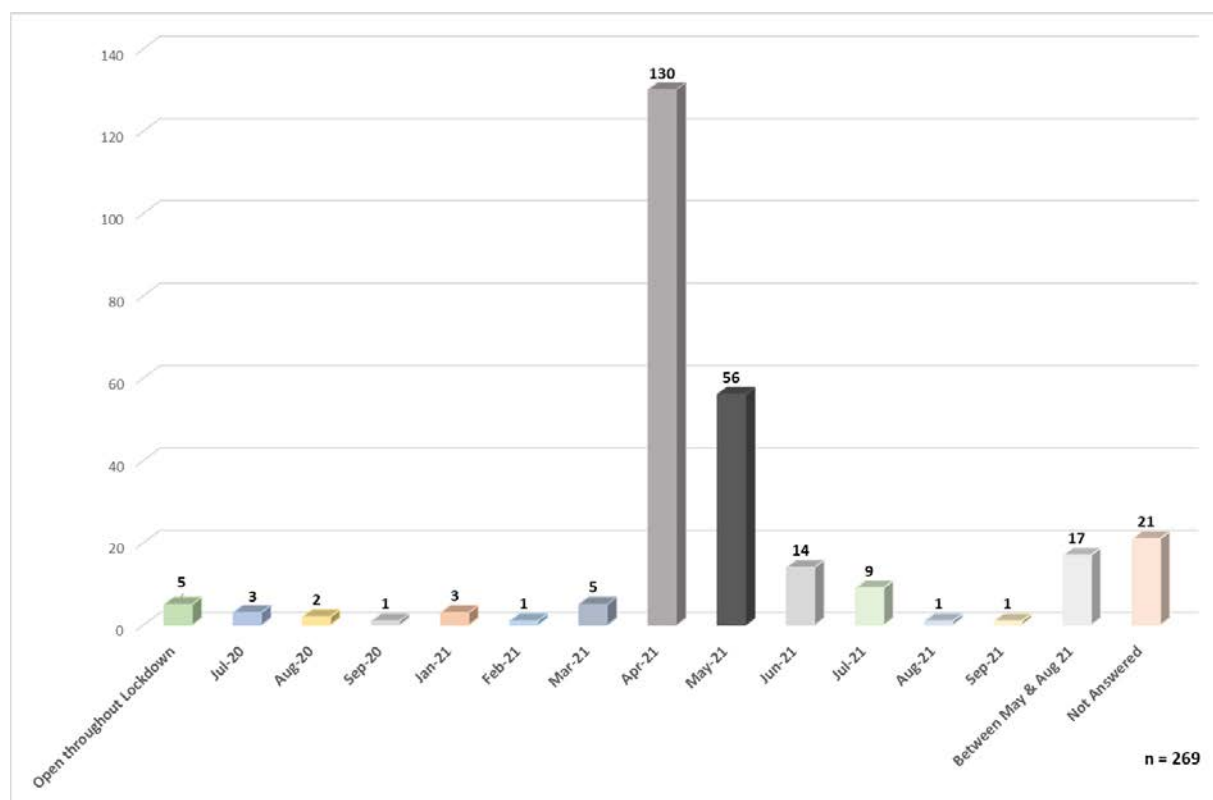
Figure 2.3 Reason for not Reopening



2.2.4 Date Opened/Reopening

Respondents were asked when they had reopened this year or what their anticipated date of reopening would be. Figure 2.4 shows a breakdown by month when the attractions opened/anticipated opening. The breakdown highlights that 130 (48.3%) anticipate being open by the end of April 2021, whilst 21 (7.8%) of attractions were unable to confirm a date for reopening.

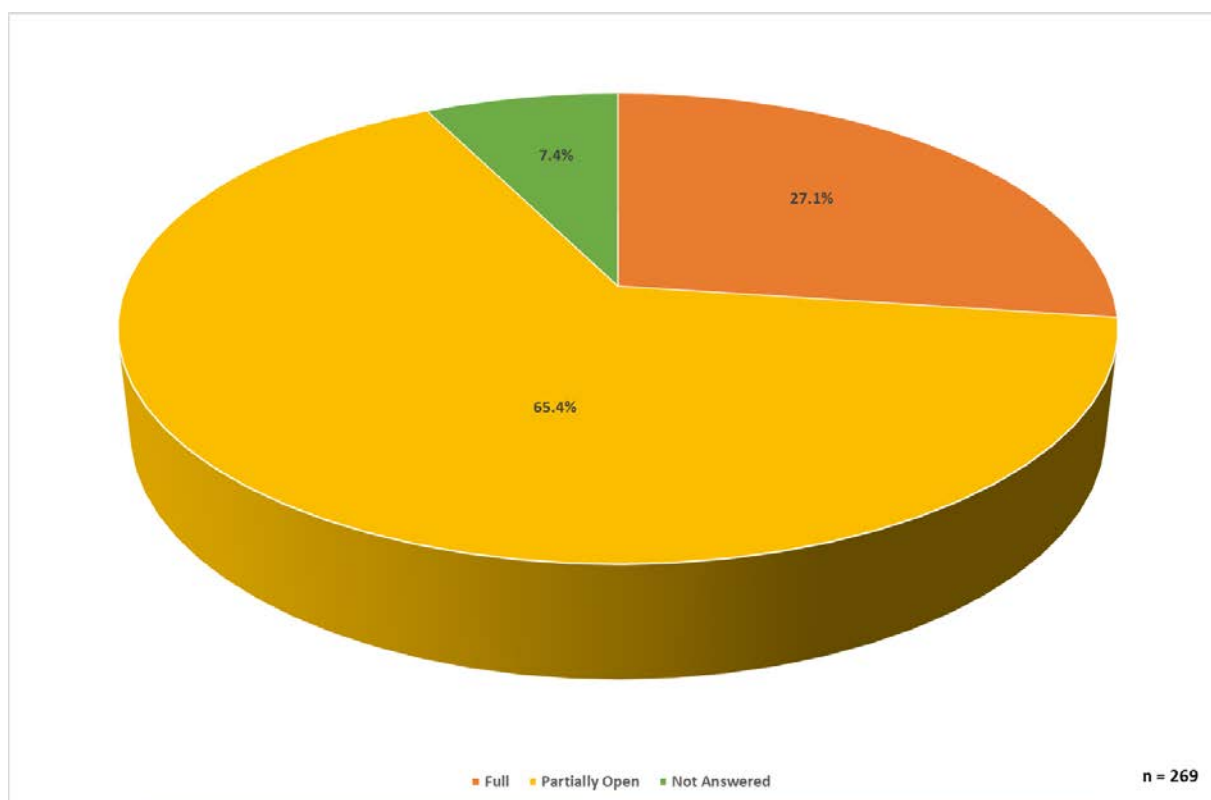
Figure 2.4 Date Opened/Reopening



2.2.5 Type of Opening

Of the 269 respondents who stated that they were open/reopening, 27.1% of respondents indicated that they would be opening fully, whilst 65.4% identified that they would be partially opening (e.g. reduced hours; weekends only; reduced facilities).

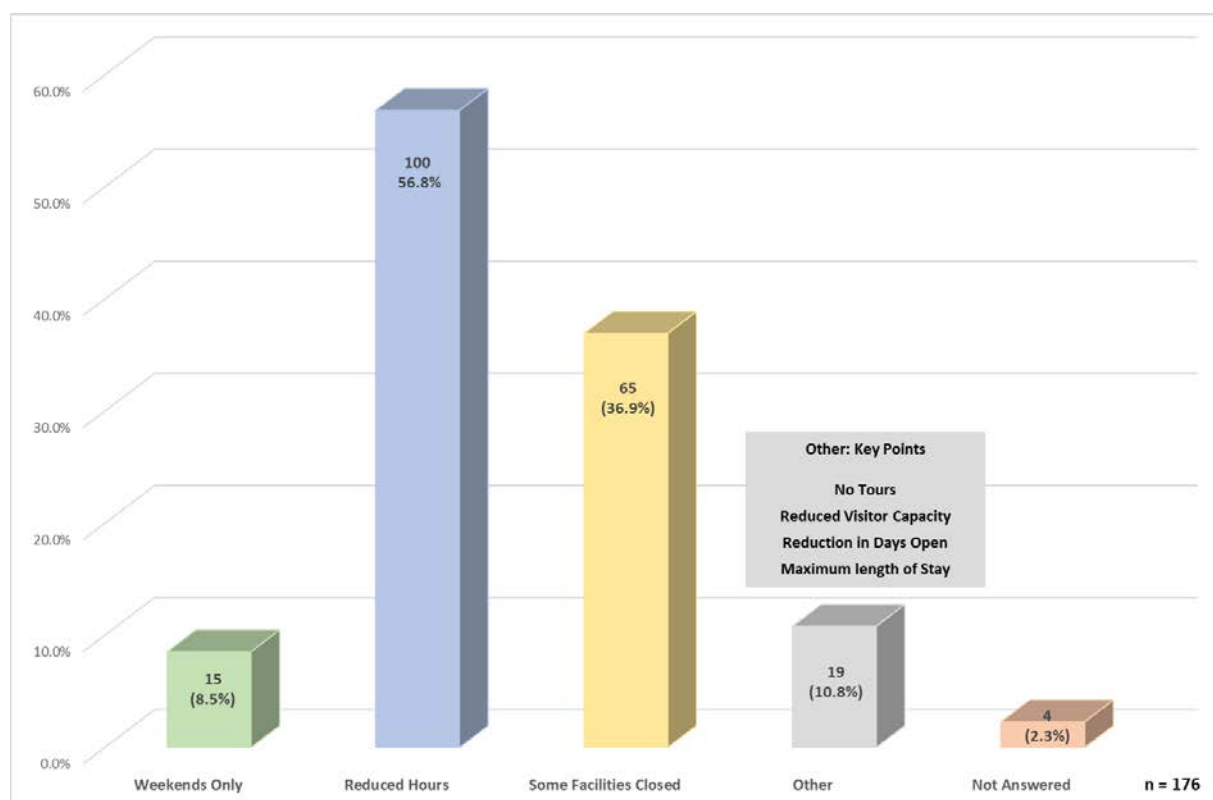
Figure 2.5 Type of Opening



2.2.6 Partial Reopening – What will it look like?

Of the attractions identified in Figure 2.5 above only able to open partially, over 50% of respondents stated that partial reopening will take the form of reduced hours, with just over a third noting that some facilities will remain closed. Other key points identified in Figure 2.6 included not able to offer tours of the attraction and the length of stay a visitor was able to visit.

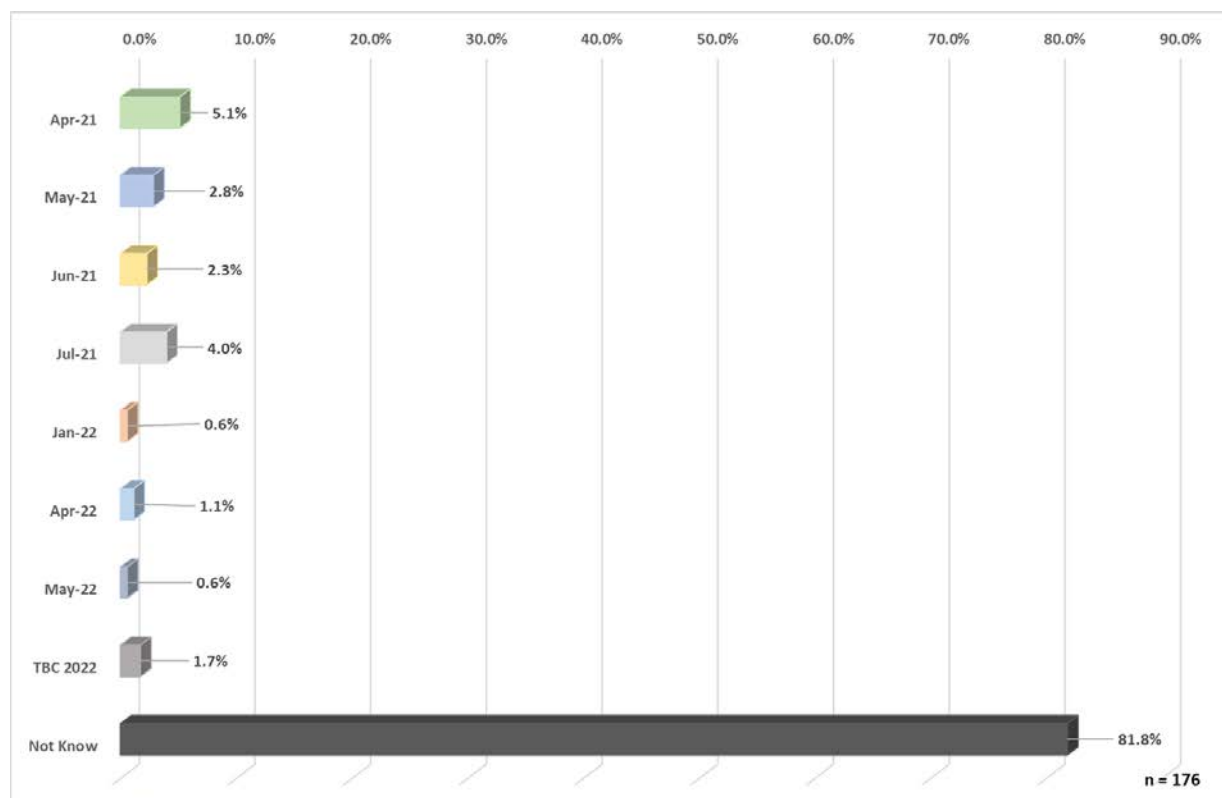
Figure 2.6 Partial Reopening – What will it look like?



2.2.7 Fully Reopening

Of the 176 respondents that are partially reopening, over 80% were unable to give a date when they believed their attraction will be able to fully reopen as shown in Figure 2.7, whilst just under 15% of attractions are hoping to be fully open by no later than July 2021.

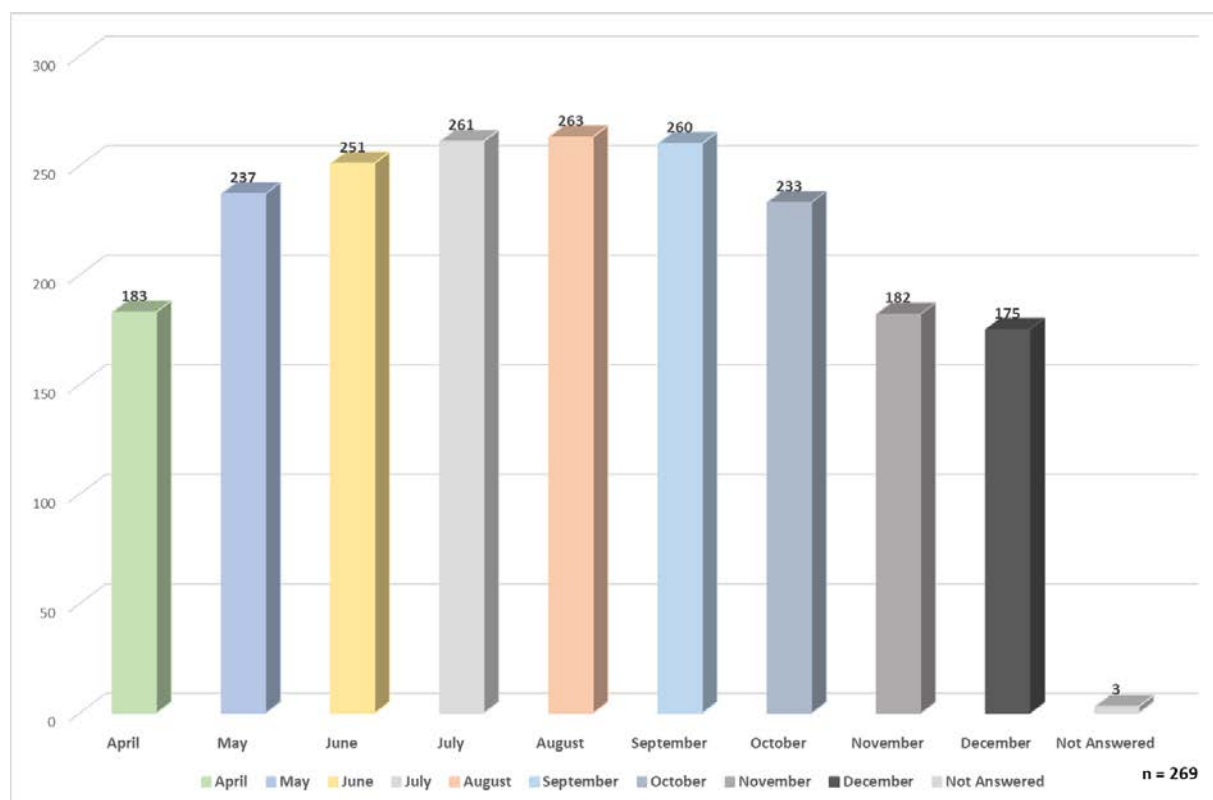
Figure 2.7 Fully Reopening



2.2.8 Number of Attractions open per month in 2021

Of the 269 respondents, 150 (55.8%) stated that they intended to remain open for the rest of 2021. As can be seen in Figure 2.8 no less than a third of attractions will be open between June and September.

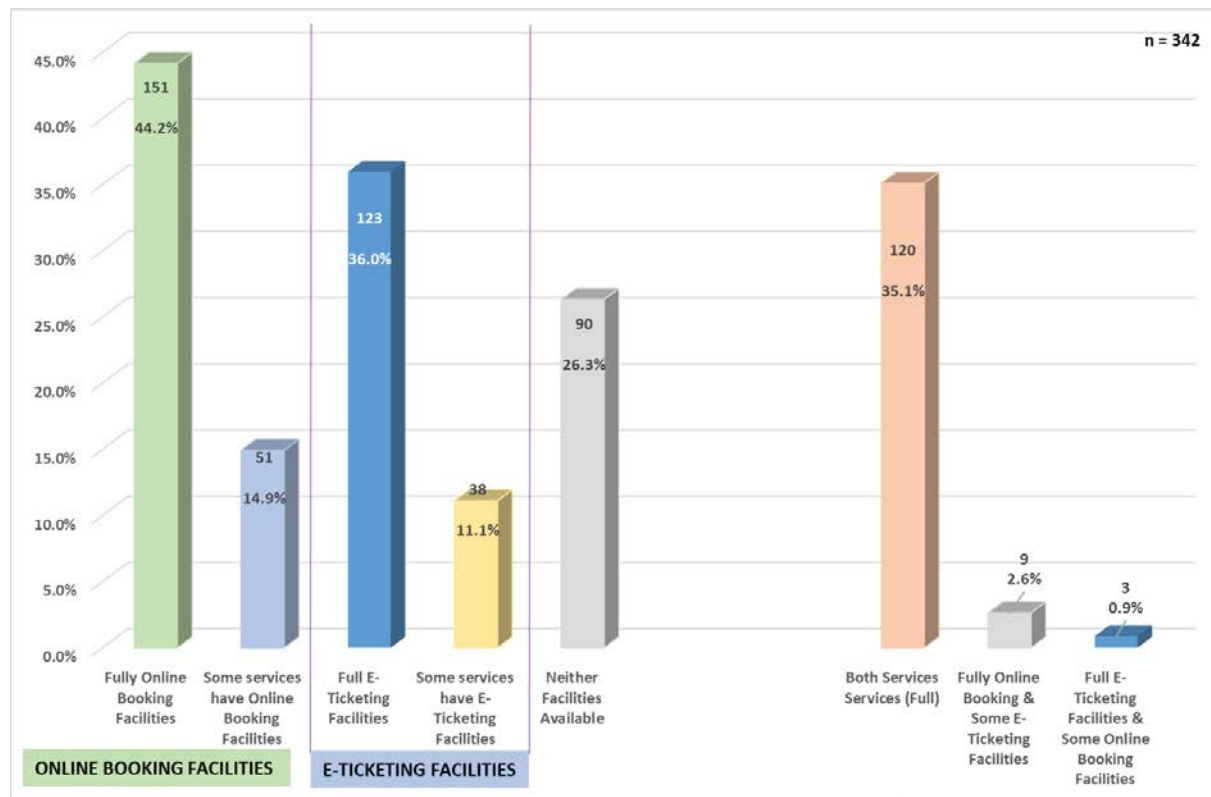
Figure 2.8 Number of attractions open per month in 2021



2.2.9 Online Booking & E-Ticketing Facilities

Respondents were asked if their attraction had an online booking facility and/or an e-ticketing facility when they reopened. Just under 60% of attractions stated they had full or partial online booking facilities, with just under 50% having full or partial e-ticketing facilities. Just over a third of respondents had fully online and e-ticketing facilities at their attractions.

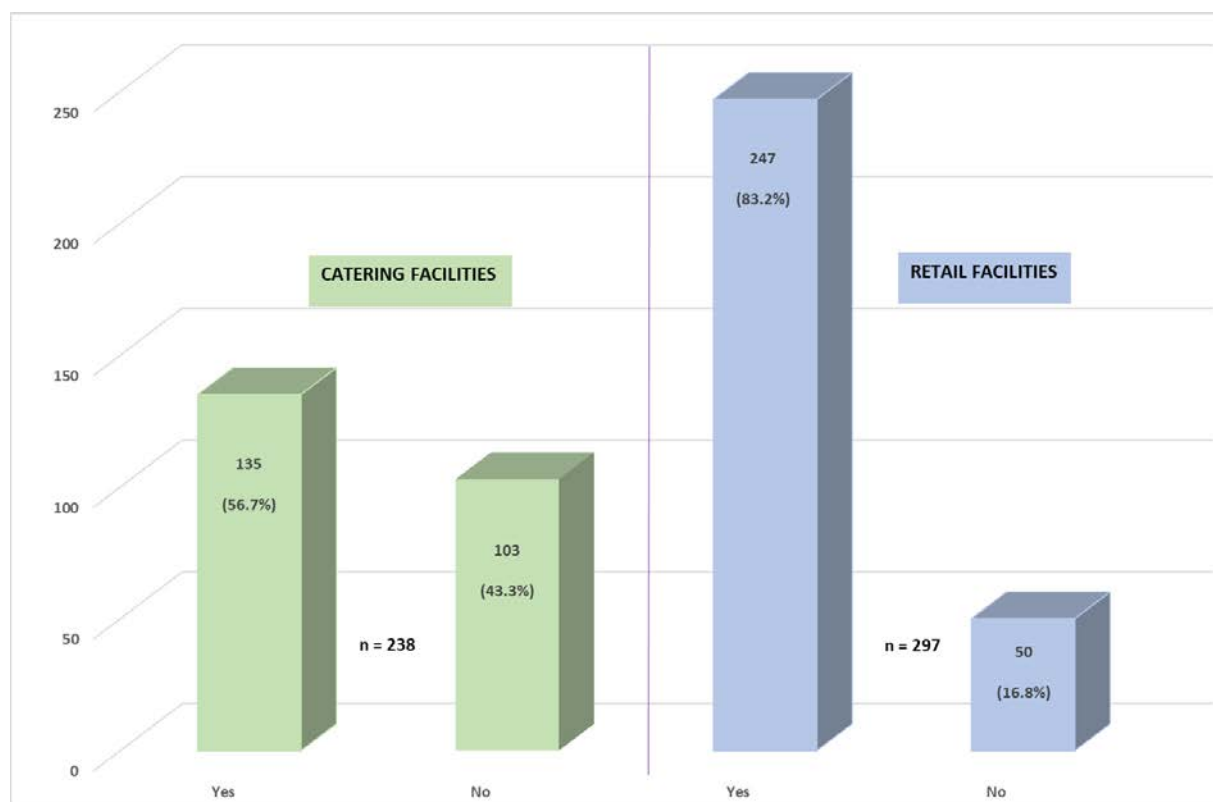
Figure 2.9 Online Booking & E-Ticketing Facilities



2.2.10 Catering & Retail Facilities

Respondents were asked if they have Catering and/or Retailing facilities at their attractions. Of the 238 respondents answering the question if they had catering facilities, 135 stated they had these facilities, whilst of the 297 respondents who answered the question regarding retail facilities, 247 stated they had this type of facility as seen in Figure 2.10.

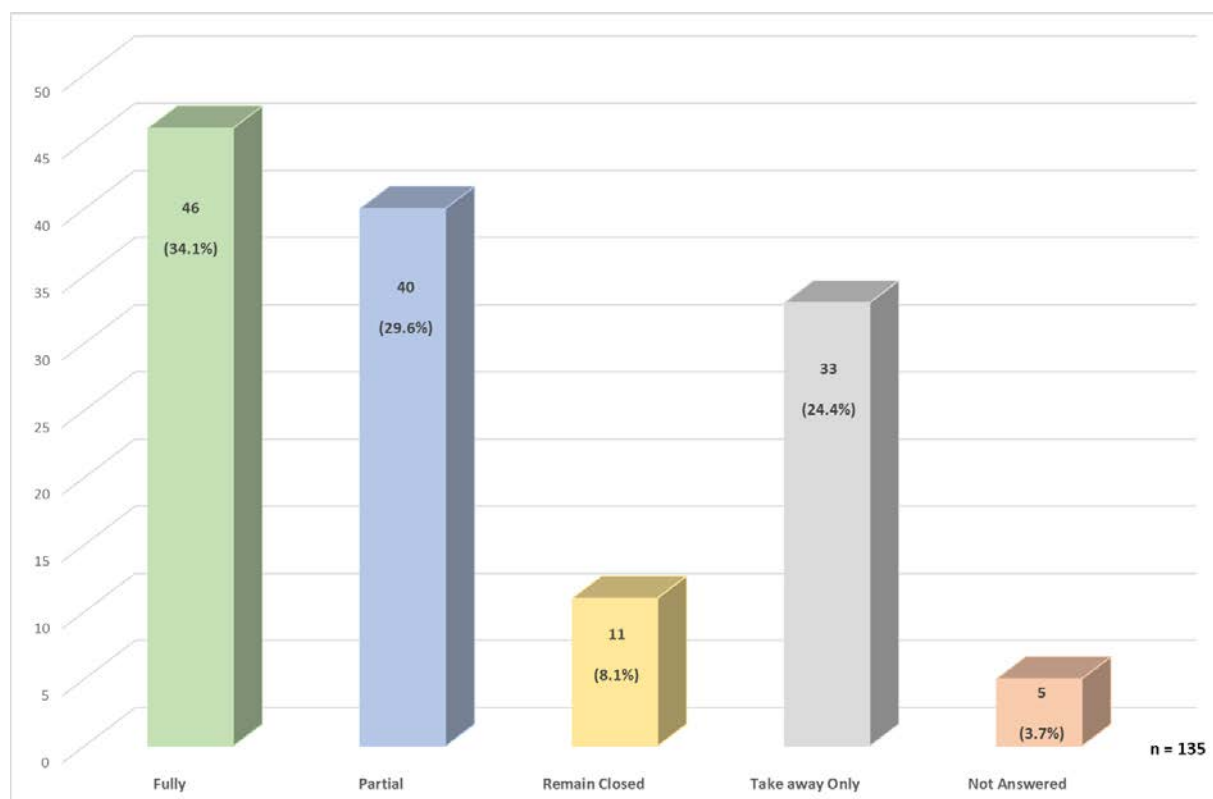
Figure 2.10 Catering & Retail Facilities



2.2.11 Catering Facilities – Initial Plan

For those respondents that stated that they had catering facilities as seen in Figure 2.10, they were asked if and how they planned to initially reopen their facilities as shown in Figure 2.11. Just over a third of respondents planned to open fully whilst just under a quarter will offer a takeaway service only.

Figure 2.11 Catering Facilities – Initial Plan

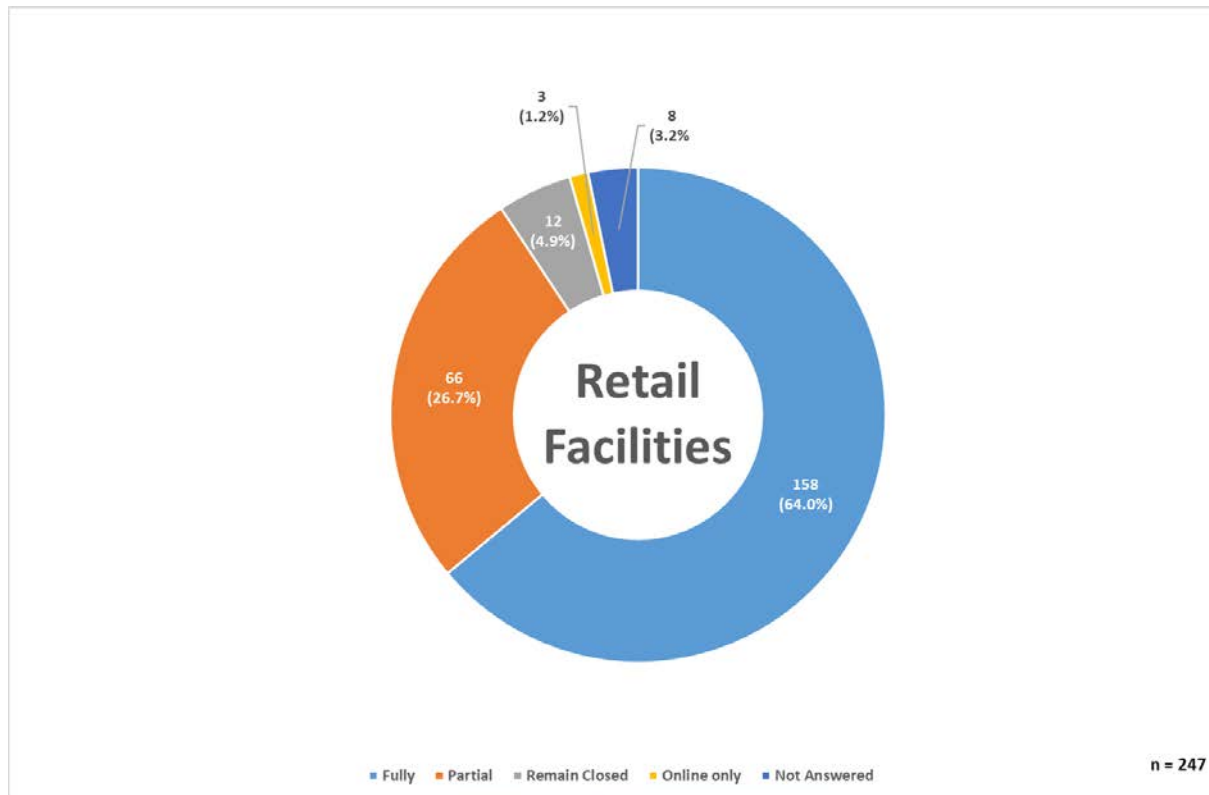


2.2.12 Retail Facilities – Initial Plan

For those respondents that stated that they had retail facilities as seen in Figure 2.10, they were asked if and how they planned to initially reopen as shown in Figure 2.11.

Just under two-thirds of respondents planned to open fully whilst just over 1% keeping their retail business online only.

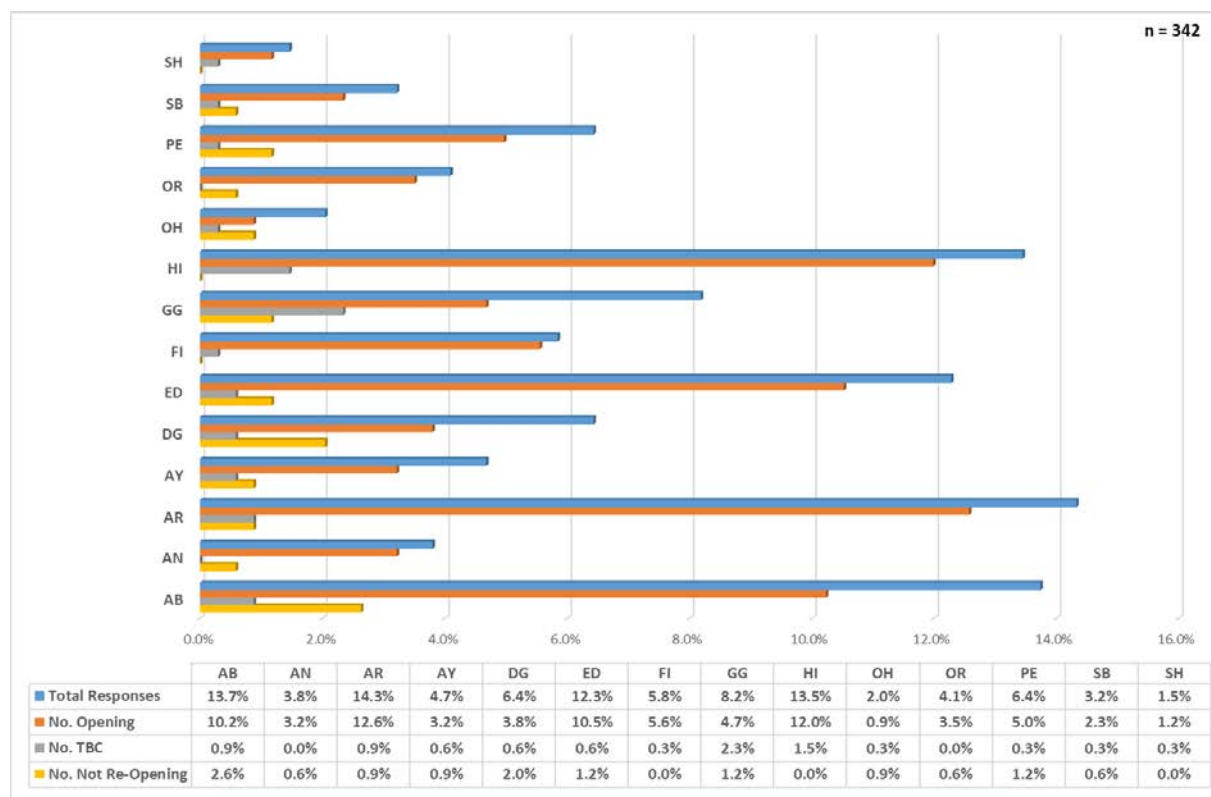
Figure 2.12 Retail Facilities – Initial Plan



2.2.13 Location of Attractions by VisitScotland Region

Of the 342 respondents, 269 (78.7%) attractions stated they would be re-opening in 2021, with 8.8% of attractions not able to confirm their plans to open. The VisitScotland Region of Argyll, Loch Lomond & The Forth Valley (AR) submitted the highest number of responses (49) and also had the highest percentage (12.6%) of attractions that were currently open or planned to open again in 2021. The VisitScotland Region of Aberdeen & Grampian (AB) had the highest percentage (2.6%) of attractions that planned not to open in 2021.

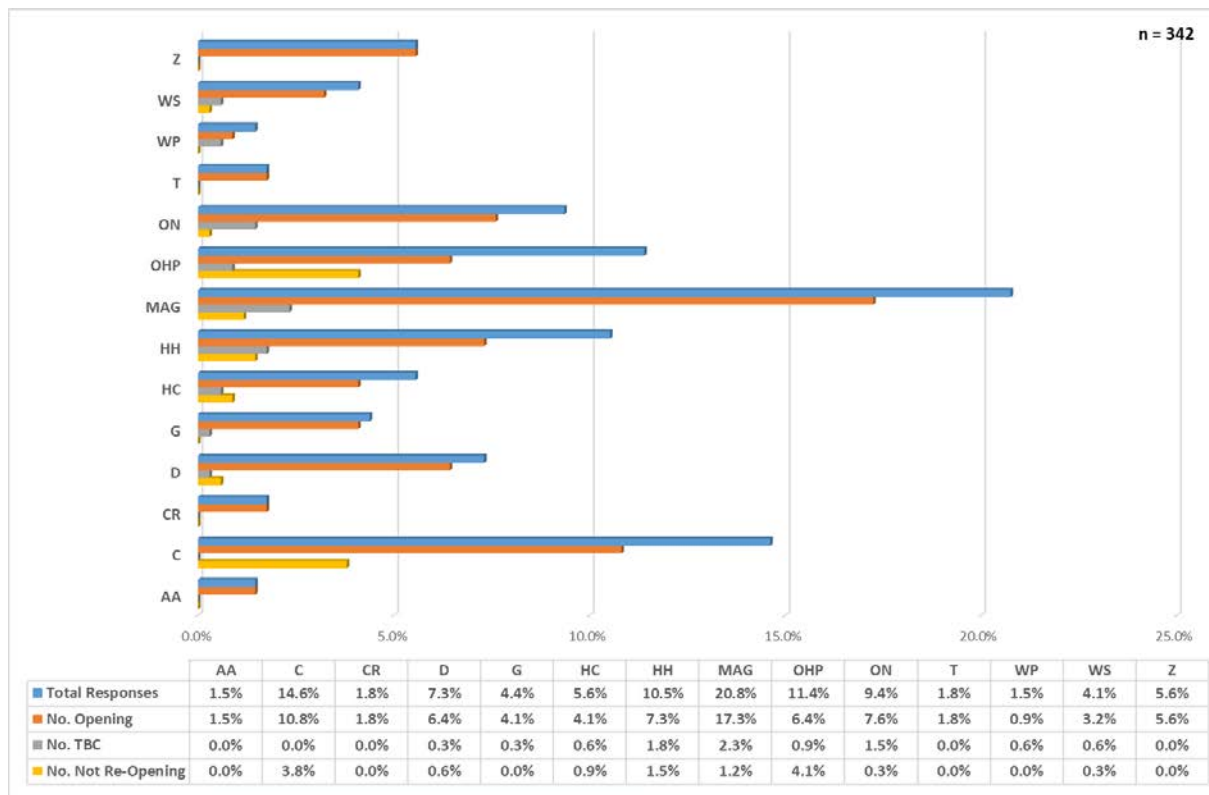
Figure 2.13 Location of Attractions by VisitScotland Region



2.2.14 Attraction Category

The Attraction Category of Museums/Art Galleries submitted the highest number of responses at 71 (20.8%) and also had the highest percentage (17.3%) of attractions that were currently open or planned to open again in 2021, however with 5.8% it had the highest amount of attractions not able to confirm their plans to open. The Attraction Category of Other Historic Properties had the highest percentage (4.1%) of attractions that planned not to open in 2021.

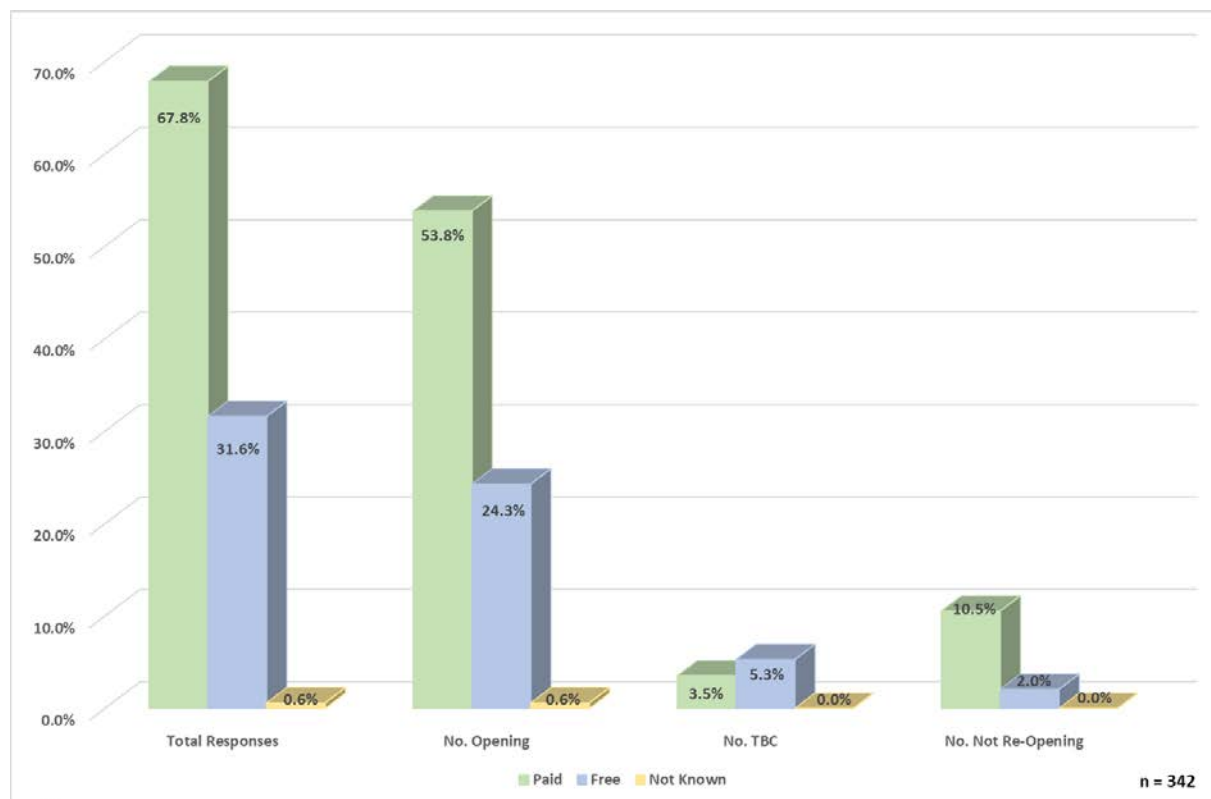
Figure 2.14 Attraction Category



2.2.15 Paid & Free Attractions

Of the 342 Respondents, 232 (67.8%) of these are paid attractions, and of this, 184 (53.8%) of the paid attractions intend to re-open. Of the 108 (31.6%) Free attractions that responded, 83 (24.3%) plan to reopen this year.

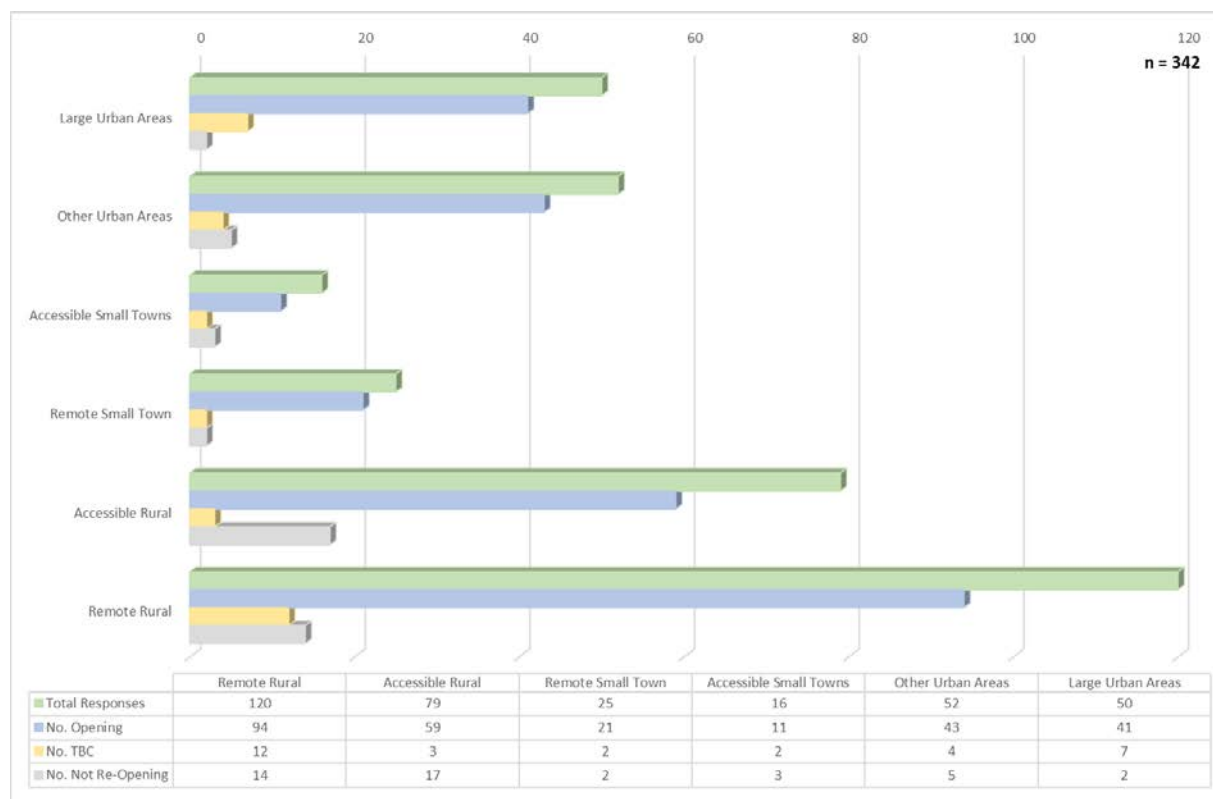
Figure 2.15 Paid & Free Attractions



2.2.16 Geographical Location of Attractions

Of the 342 Respondents, over half are located in Rural (79 (23.1%) in Accessible Rural and 120 (35.1%) in Remote Rural (199) locations, with over a quarter of all attractions located in Large or Other Urban Areas (50 (14.6%) and 52 (15.2%) respectively). Attractions in the Remote Rural Areas had the highest number of attractions (94 (27.5%)) that were currently open or planned to open again in 2021.

Figure 2.16 Geographical Location of Attractions

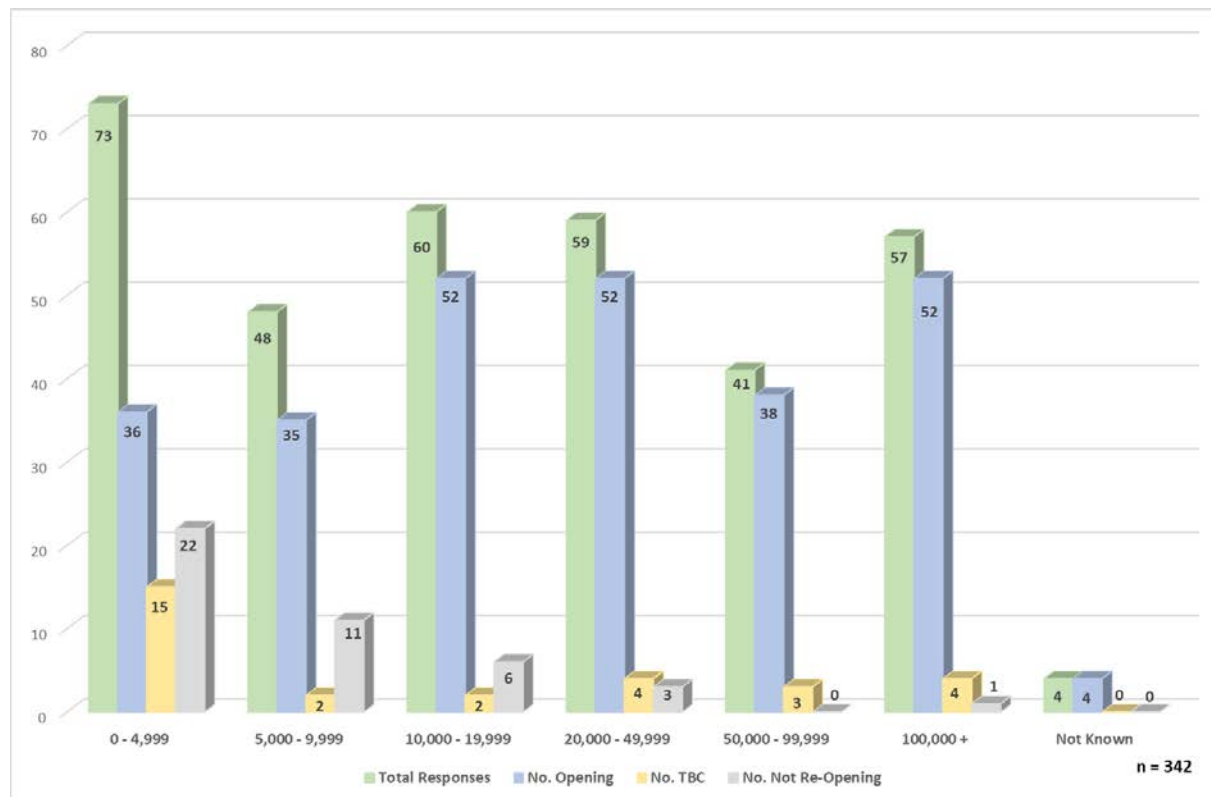


Scottish Government's 2013-2014 Urban Rural Classification

2.2.17 Volume of Visits

52 of the 57 Respondent attractions with over 100,000 visits yearly were currently open or planned to open again in 2021. Of the 73 Respondents with up to 4,999 visits yearly, 15 attractions were not able to confirm their plans to open, with a further 22 attractions stating they would not be opening in 2021.

Figure 2.17 Volume of Visits

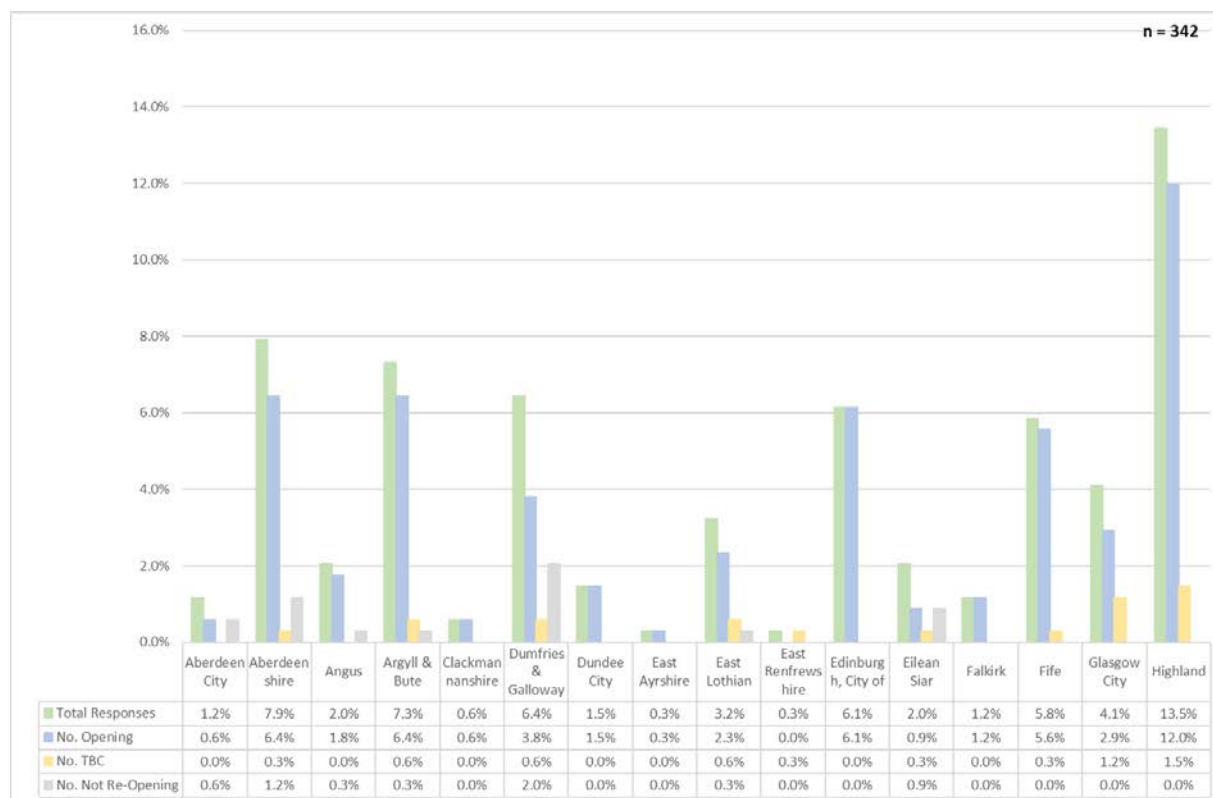


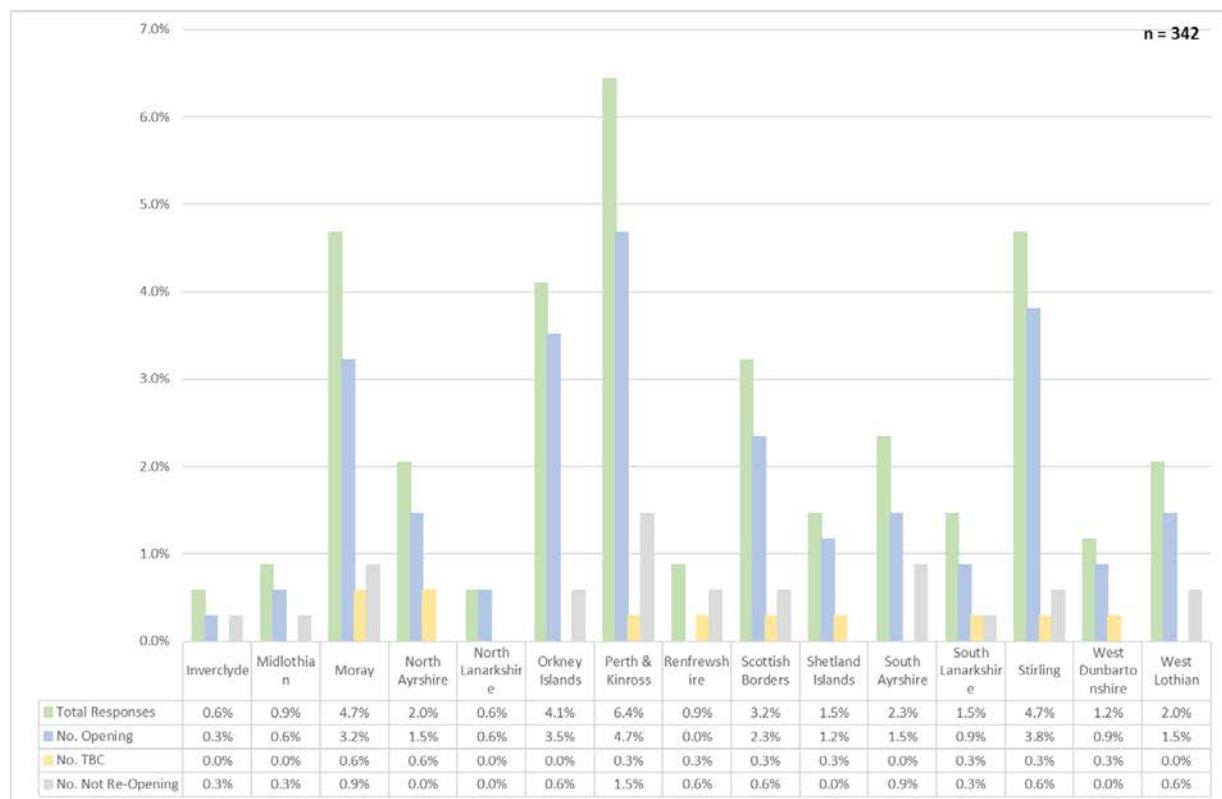
**Updated using the Moffat Centre Scottish Visitor Attraction Monitor 2020*

2.2.18 Location of Attractions by Local Authority Area

The Highland Local Authority submitted the highest number of responses (46) and also had the highest percentage (12.0%) of attractions that were currently open or planned to open again in 2021. The Local Authority area of Dumfries & Galloway had the highest percentage (2.0%) of attractions not opening again in 2021. It should be noted that the Local Authority graph has been split into two for ease of reading.

Figure 2.18 Location of Attractions by Local Authority Area





2.2.19 List by Status of Scottish Visitor Attractions in 2021

This section contains listings of attractions according to whether they are currently or planned to open again or remain closed for the remainder of 2021. Attractions are arranged in alphabetical order. Please note that the following tables do not include attractions that requested to remain confidential.

Table 2.1 Scottish Visitor Attractions Currently or Planning to Open in 2021 (in alphabetical order)

Owner	Attraction Name	Full or Partial Reopening	Anticipated date of opening	Category	VS Region	Council	Admission
HS	Aberdour Castle	Partial	30/04/2021	C	FI	Fife	Paid
NTS	Abertarff House	Partial	01/07/2021	HH	HI	Highland	Free
LA	Aden Country park	Full	01/01/2021	ON	AB	Aberdeenshire	Free
P	Allanwater Brewhouse - Tinpot Brewery	Partial	26/04/2021	D	AR	Stirling	Paid
NTS	Alloa Tower	Full	29/04/2021	OHP	AR	Clackmannanshire	Paid
CT	Almond Valley Heritage Centre	Partial	03/04/2021	Z	ED	West Lothian	Paid
HS	Arbroath Abbey	Partial	30/04/2021	OHP	AN	Angus	Paid
P	Archerfield Walled Garden	Full	17/05/2021	G	ED	East Lothian	Free
PLC	Ardnahoe Distillery	Full	26/04/2021	D	AR	Argyll & Bute	Paid
NTS	Arduaine Garden	Partial	04/01/2021	G	AR	Argyll & Bute	Paid
P	Arniston House	Partial	04/05/2021	HH	ED	Midlothian	Paid
P	Attadale Gardens	Full	02/04/2021	G	HI	Highland	Paid
CT	Auchindrain Historic Township	Partial	26/04/2021	OHP	AR	Argyll & Bute	Paid
P	Auchingarrich Wildlife Centre	Partial	26/04/2021	Z	PE	Perth & Kinross	Paid
P	Ballindalloch Castle	Partial	23/05/2021	C	AB	Moray	Paid
NTS	Balmacara Estate & Lochalsh Woodland Garden			ON	HI	Highland	Free
NTS	Balmerino Abbey		01/03/2020	OHP	FI	Fife	Free
NTS	Bannockburn Heritage Centre	Full	26/04/2021	HC	AR	Stirling	Paid
NTS	Barrie's Birthplace	Partial	30/04/2021	OHP	AN	Angus	Paid
NTS	Barry Mill	Partial	30/04/2021	WP	AN	Angus	Paid
CT	Barstobrick	Full	01/05/2021	HC	DG	Dumfries & Galloway	
P	Bella Jane Boat Trips	Partial	16/05/2021	Z	HI	Highland	Paid
NTS	Ben Lawers Visitor Centre			ON	PE	Stirling	Free

HS	Bishop's and Earl's Palaces	Partial	Between May and August	HH	OR	Orkney Islands	Paid
HS	Blackhouse, Arnol	Partial	Between May and August	HH	OH	Eilean Siar	Paid
HS	Blackness Castle	Partial	30/04/2021	C	AR	Falkirk	Paid
P	Blair Drummond Safari and Adventure Park	Partial	20/03/2021	Z	AR	Stirling	Paid
RO	Blairs Museum	Partial	30/04/2021	MAG	AB	Aberdeenshire	Paid
HS	Bothwell Castle	Partial	Between May and August	C	GG	South Lanarkshire	Paid
NTS	Branklyn Garden	Full	02/04/2021	G	PE	Perth & Kinross	Paid
P	Briarlands Farm	Partial	26/04/2021	Z	AR	Stirling	Paid
HS	Broch of Gurness	Partial	Between May and August	OHP	OR	Orkney Islands	Paid
NTS	Brodie Castle	Partial	02/04/2021	C	AB	Moray	Paid
NTS	Broughton House & Garden	Partial	01/05/2021	HH	DG	Dumfries & Galloway	Paid
NTS	Burg		01/03/2020	ON	AR	Argyll & Bute	Free
HS	Caerlaverock Castle	Partial	30/04/2021	C	DG	Dumfries & Galloway	Paid
LA	Camperdown Wildlife Centre	Partial	26/04/2021	Z	AN	Dundee City	Paid
NTS	Canna			ON	HI	Highland	Free
NTS	Carlyle's Birthplace	Partial	29/05/2021	HH	DG	Dumfries & Galloway	Paid
HS	Castle Campbell	Partial	Between May and August	C	AR	Clackmannanshire	Paid
NTS	Castle Fraser	Partial	30/04/2021	C	AB	Aberdeenshire	Paid
CT	CatStrand	Partial	26/04/2021	HC	DG	Dumfries & Galloway	Free
P	Cawdor Castle and Gardens	Partial	30/04/2021	C	HI	Highland	Paid
CT	Centre for Contemporary Arts	Partial	30/04/2021	MAG	GG	Glasgow City	Free
CT	Church of the Holy Rude, Stirling	Partial		WS	AR	Stirling	Free
P	City Sightseeing Glasgow	Full	26/04/2021	T	GG	Glasgow City	Paid
P	Clansman Centre	Partial	27/05/2021	MAG	HI	Highland	Paid
P	Cluny Clays	Partial	12/07/2020	AA	FI	Fife	Paid
O	Cockburn Museum of Geology and Geophysics	Partial	01/09/2021	MAG	ED	Edinburgh, City of	Free
P	Coll Pottery Craft Centre	Partial	01/05/2021	CR	OH	Eilean Siar	Free
NTS	Corrieshalloch Gorge	Full	01/03/2020	ON	HI	Highland	Free

NTS	Craigievar Castle	Partial	01/06/2021	C	AB	Aberdeenshire	Paid
HS	Craigmillar Castle	Partial	30/04/2021	C	ED	Edinburgh, City of	Paid
LA	Craigtoun Country Park	Partial	01/05/2021	ON	FI	Fife	Free
NTS	Crarae Garden	Partial	04/01/2021	G	AR	Argyll & Bute	Paid
NTS	Crathes Castle	Partial	02/04/2021	C	AB	Aberdeenshire	Paid
CT	Crawfordjohn Heritage Venture	Partial	29/05/2021	MAG	GG	South Lanarkshire	Paid
P	Crieff Visitor Centre	Full	26/04/2021	CR	PE	Perth & Kinross	Free
NTS	Culross Palace	Full	26/04/2021	HH	FI	Fife	Paid
NTS	Culzean Castle and Country Park	Partial	30/04/2021	C	AY	South Ayrshire	Paid
PLC	Deep Sea World	Full	26/04/2021	Z	FI	Fife	Paid
HS	Dirleton Castle	Partial	30/04/2021	C	ED	East Lothian	Paid
HS	Doune Castle	Partial	30/04/2021	C	AR	Stirling	Paid
NTS	Drum Castle	Partial	02/04/2021	C	AB	Aberdeenshire	Paid
HS	Dryburgh Abbey	Partial	30/04/2021	OHP	SB	Scottish Borders	Paid
P	Duart Castle	Partial	09/05/2021	C	AR	Argyll & Bute	Paid
HS	Duff House Gallery	Partial	Between May and August	MAG	AB	Aberdeenshire	Paid
HS	Dumbarton Castle	Partial	30/04/2021	C	AR	West Dunbartonshire	Paid
HS	Dunblane Cathedral	Partial	30/04/2021	WS	AR	Stirling	Free
CT	Dunblane Museum	Partial	21/08/2021	MAG	AR	Stirling	Free
CT	Dundee Museum of Transport	Full	26/04/2021	MAG	AN	Dundee City	Paid
HS	Dundrennan Abbey	Partial	Between May and August	OHP	DG	Dumfries & Galloway	Paid
HS	Dunfermline Abbey and Palace	Partial	30/04/2021	WS	FI	Fife	Paid
P	Dunnet Bay Distillery	Full	03/05/2021	D	HI	Highland	Free
P	Dunnottar Castle	Partial	26/04/2021	C	AB	Aberdeenshire	Paid
HS	Dunstaffnage Castle	Partial	30/04/2021	C	AR	Argyll & Bute	Paid
P	Edinburgh Bus Tours	Full	30/04/2021	T	ED	Edinburgh, City of	Paid
HS	Edinburgh Castle	Partial	30/04/2021	C	ED	Edinburgh, City of	Paid
HS	Edzell Castle	Partial	Between May and August	C	AN	Angus	Paid
CT	Eilean Donan Castle & Visitor Centre	Partial	12/05/2021	C	HI	Highland	Free
HS	Elcho Castle	Partial	Between May and August	C	PE	Perth & Kinross	Paid

HS	Elgin Cathedral	Partial	30/04/2021	OHP	AB	Moray	Paid
NTS	Falkland Palace	Partial	28/04/2021	HH	FI	Fife	Paid
CT	Fife Folk Museum	Full	01/05/2021	MAG	FI	Fife	Free
P	Finlaggan Visitor Centre	Partial	26/04/2021	HC	AR	Argyll & Bute	Free
P	Five Sisters Zoo	Partial	13/04/2021	Z	ED	West Lothian	Paid
HS	Fort George	Partial	30/04/2021	C	HI	Highland	Paid
G	Forvie National Nature Reserve	Partial		ON	AB	Aberdeenshire	Free
NTS	Fyvie Castle	Partial	13/05/2021	C	AB	Aberdeenshire	Paid
CT	Gairloch Museum	Full	27/04/2021	MAG	HI	Highland	Paid
NTS	Geilston Garden	Partial	02/04/2021	G	AR	Argyll & Bute	Paid
NTS	Georgian House	Partial	30/04/2021	HH	ED	Edinburgh, City of	Paid
P	Giant Angus MacAskill Museum	Full	30/05/2021	MAG	HI	Highland	Paid
P	Gilnockie Tower	Full	01/05/2021	OHP	DG	Dumfries & Galloway	Paid
NTS	Gladstone's Land	Full	17/05/2021	HH	ED	Edinburgh, City of	Paid
HS	Glasgow Cathedral	Partial	30/04/2021	WS	GG	Glasgow City	Free
CT	Glasgow Police Museum	Full	01/05/2021	MAG	GG	Glasgow City	Free
CT	Glen Tanar Visitor Centre	Full		ON	AB	Aberdeenshire	Free
CT	Glencoe Folk Museum	Partial	13/05/2021	MAG	HI	Highland	Paid
P	Glencoe Mountain Resort	Full	26/04/2021	AA	HI	Highland	Paid
P	Glenmorangie	Partial	26/04/2021	D	HI	Highland	Paid
G	Glenmore Forest Park Visitor Centre	Partial	26/04/2021	ON	HI	Highland	Free
P	Glenturret Distillery	Full	26/04/2021	D	PE	Perth & Kinross	Paid
NTS	Goatfell			ON	AY	North Ayrshire	Free
CT	Grampian Transport Museum	Partial	29/04/2021	MAG	AB	Aberdeenshire	Paid
CT	Grantown Museum	Full	01/05/2021	MAG	HI	Highland	Paid
P	Gretna Green Famous Blacksmith Shop	Partial	26/04/2021	HC	DG	Dumfries & Galloway	Free
RO	Greyfriars Kirk	Partial	27/05/2021	WS	ED	Edinburgh, City of	Free
CT	Groam House Museum	Partial	01/05/2021	MAG	HI	Highland	Free
NTS	Haddo House	Partial	02/04/2021	HH	AB	Aberdeenshire	Paid
CT	Hanseatic Booth	Full	03/05/2021	OHP	SH	Shetland Islands	Paid
P	Harray Potter Ltd	Full	26/04/2021	CR	OR	Orkney Islands	Free
NTS	Hermitage	Full		ON	PE	Perth & Kinross	Free
LA	Hermitage of Braid	Full		Z	ED	Edinburgh, City of	Free

NTS	Hill House	Full	30/04/2021	HH	AR	Argyll & Bute	Paid
NTS	Hill of Tarvit	Partial	27/05/2021	G	FI	Fife	Paid
O	Hoswick Visitors Centre	Partial	01/04/2021	HC	SH	Shetland Islands	Free
CT	House for an Art Lover	Partial	27/02/2021	MAG	GG	Glasgow City	Paid
NTS	House of Dun	Partial	15/06/2021	HH	AN	Angus	Paid
HS	Huntingtower Castle	Partial	Between May and August	C	PE	Perth & Kinross	Paid
HS	Huntly Castle	Partial	30/04/2021	C	AB	Aberdeenshire	Paid
HS	Inchcolm Abbey	Partial	30/04/2021	OHP	FI	Fife	Paid
P	Inveraray Castle		27/05/2021	HH	AR	Argyll & Bute	Paid
NTS	Inveresk Lodge Garden			G	ED	East Lothian	Paid
NTS	Inverewe Garden	Full	30/04/2021	G	HI	Highland	Paid
LA	Inverness Museum & Art Gallery	Full	27/04/2021	MAG	HI	Highland	Free
NTS	Iona			ON	AR	Argyll & Bute	Free
HS	Iona Abbey	Partial	Between May and August	HC	AR	Argyll & Bute	Paid
CT	Isle of Arran Heritage Museum	Full	28/04/2021	MAG	AY	South Ayrshire	Paid
HS	Jarlshof	Partial	Between May and August	OHP	SH	Shetland Islands	Paid
HS	Jedburgh Abbey	Partial	30/04/2021	OHP	SB	Scottish Borders	Paid
RO	John Knox House	Partial	30/04/2021	HH	ED	Edinburgh, City of	Paid
P	Kelburn Castle & Country Centre	Partial	12/03/2021	ON	AY	North Ayrshire	Paid
NTS	Kellie Castle	Partial	26/04/2021	C	FI	Fife	Paid
HS	Kildrummy Castle	Partial	Between May and August	C	AB	Aberdeenshire	Paid
NTS	Kintail Estate			ON	HI	Highland	Free
RO	Kirk of Calder	Partial	07/07/2021	WS	ED	West Lothian	Free
P	Lagg Distillery	Partial	26/04/2021	D	AY	North Ayrshire	Paid
PLC	Laphroaig Distillery	Partial	24/09/2020	D	AR	Argyll & Bute	Paid
CT	Library of Innerpeffray	Partial	02/06/2021	OHP	PE	Perth & Kinross	Paid
HS	Linlithgow Palace	Partial	30/04/2021	HH	ED	West Lothian	Paid
CT	Linlithgow Union Canal Society	Partial	29/05/2021	ON	ED	West Lothian	Free
G	Loch Fleet NNR	Full	01/03/2020	ON	HI	Highland	Free

G	Loch Lomond Shores	Full	26/04/2021	CR	AR	West Dunbartonshire	Free
P	Loch Ness by Jacobite	Partial	30/04/2021	T	HI	Highland	Paid
P	Loch Shiel Cruises	Full	27/05/2021	T	HI	Highland	Paid
LA	Lochore Meadows Country Park	Full	08/03/2021	ON	FI	Fife	Free
P	Logie Steading	Partial	26/04/2021	ON	AB	Moray	Free
LA	Macduff Marine Aquarium	Full	26/04/2021	Z	AB	Aberdeenshire	Paid
P	Mackintosh at the Willow	Partial	30/04/2021	CR	GG	Glasgow City	Free
HS	Maeshowe	Partial	Between May and August	OHP	OR	Orkney Islands	Paid
CT	Mallaig Heritage Centre	Full	26/04/2021	HC	HI	Highland	Paid
NTS	Malleny Garden			G	ED	Edinburgh, City of	Paid
NTS	Mar Lodge Estate			ON	AB	Aberdeenshire	Free
P	Mary Ann's cottage	Partial	01/06/2021	HH	HI	Highland	Paid
CT	Maryhill Burgh Halls	Full	21/06/2021	MAG	GG	Glasgow City	Free
LA	McKechnie Institute	Partial	04/05/2021	MAG	AY	South Ayrshire	Free
HS	Melrose Abbey	Partial	30/04/2021	OHP	SB	Scottish Borders	Paid
P	Mercat Tours	Partial	30/04/2021	AA	ED	Edinburgh, City of	Paid
CT	Mill on the Fleet	Full	26/04/2021	HC	DG	Dumfries & Galloway	Free
CT	Montrose Basin Wildlife Centre	Partial	01/05/2021	Z	AN	Angus	Paid
CT	Mount Stuart	Partial	01/05/2021	HH	AR	Argyll & Bute	Paid
CT	Museum of Islay Life	Partial	02/04/2021	MAG	AR	Argyll & Bute	Paid
CT	Museum of Lead Mining	Partial	18/06/2021	MAG	DG	Dumfries & Galloway	Paid
G	National Museum of Flight	Partial	26/04/2021	MAG	ED	East Lothian	Paid
G	National Museum of Scotland	Partial	26/04/2021	MAG	ED	Edinburgh, City of	Free
NTS	Newhailes		26/04/2021	HH	ED	East Lothian	Paid
CT	Newton Stewart Museum	Partial	03/05/2021	MAG	DG	Dumfries & Galloway	Paid
LA	Old Town Jail	Full	30/04/2021	OHP	AR	Stirling	Paid
LA	Orkney Museum	Partial	13/08/2020	MAG	OR	Orkney Islands	Free
CT	Peterhead Prison Museum	Full	26/04/2021	MAG	AB	Aberdeenshire	Paid
CT	Pier Arts Centre	Partial	18/03/2021	MAG	OR	Orkney Islands	Free
NTS	Pitmedden Garden & Museum of Farm Life	Partial	27/05/2021	G	AB	Aberdeenshire	Paid
P	Pulteney Distillery	Partial	26/04/2021	D	HI	Highland	Paid
NTS	Robert Burns Birthplace Museum	Full	30/04/2021	HC	AY	South Ayrshire	Paid
CT	Rosslyn Chapel	Full	26/04/2021	WS	ED	Midlothian	Paid

HS	Rothsay Castle	Partial	Between May and August	C	AR	Argyll & Bute	Paid
P	Scone Palace	Partial	28/04/2021	HH	PE	Perth & Kinross	Paid
CT	Scottish Dolphin Centre	Partial	26/04/2021	Z	AB	Moray	Free
LA	Scottish Fire and Rescue Service Museum and Heritage Centre	Partial		MAG	GG	Inverclyde	Free
CT	Scottish Maritime Museum	Full	29/04/2021	MAG	AY	North Ayrshire	Paid
CT	Scottish Seabird Centre	Full	26/04/2021	Z	ED	East Lothian	Paid
CT	Scottish Vintage Bus Museum	Partial	13/06/2021	MAG	FI	Fife	Paid
HS	Skara Brae	Partial	20/08/2020	OHP	OR	Orkney Islands	Paid
P	Skyeskyns Ltd	Full	30/04/2021	WP	HI	Highland	Free
P	Speyside Cooperage Visitor Centre	Full	17/05/2021	HC	AB	Moray	Paid
HS	Spynie Palace	Partial	Between May and August	HH	AB	Moray	Paid
NTS	St Abb's Head			ON	SB	Scottish Borders	Free
HS	St Andrews Castle	Partial	30/04/2021	C	FI	Fife	Paid
HS	St Andrews Cathedral	Partial	30/04/2021	OHP	FI	Fife	Paid
CT	St Andrews Preservation Trust Museum & Garden	Partial	15/05/2021	MAG	FI	Fife	Free
RO	St Giles' Cathedral	Partial	03/05/2021	WS	ED	Edinburgh, City of	Free
RO	St Johns Kirk of Perth			WS	PE	Perth & Kinross	Free
LA	St Magnus Cathedral	Partial	26/07/2020	WS	OR	Orkney Islands	Free
HS	Stirling Castle	Partial	30/04/2021	C	AR	Stirling	Paid
P	Stirling Distillery	Full	17/05/2021	D	AR	Stirling	Paid
CT	Strachur Smiddy Museum	Partial	26/06/2021	MAG	AR	Argyll & Bute	Paid
PLC	Strathisla Distillery Visitor Centre	Partial	26/04/2021	D	AB	Moray	Paid
O	Strathspey Steam Railway	Partial	21/05/2021	T	HI	Highland	Paid
PLC	Summerhall Distillery	Partial	01/06/2021	D	ED	Edinburgh, City of	Paid
CT	Taigh chearsabhagh trading	Partial	26/04/2021	MAG	OH	Eilean Siar	Paid
CT	Tain Through Time	Partial	03/05/2021	MAG	HI	Highland	Paid
HS	Tantallon Castle	Partial	30/04/2021	C	ED	East Lothian	Paid
CT	Tarbat Discovery Centre	Partial	01/05/2021	MAG	HI	Highland	Paid
G	Tentsmuir National Nature Reserve	Full		ON	FI	Fife	Free
CT	The Black Watch Castle and Museum	Full	26/04/2021	MAG	PE	Perth & Kinross	Free

P	The Borders Distillery	Full	17/05/2021	D	SB	Scottish Borders	Paid
P	The Cairngorm Reindeer Centre	Full	26/04/2021	Z	HI	Highland	Paid
PLC	The Chocolatarium	Partial	26/04/2021	CR	ED	Edinburgh, City of	Paid
G	The Falkirk Wheel	Partial	08/04/2021	T	AR	Falkirk	Free
CT	The Fruitmarket Gallery	Full	07/07/2021	MAG	ED	Edinburgh, City of	Free
CT	The Gordon Highlanders Museum	Full	12/06/2021	MAG	AB	Aberdeen City	Paid
LA	The Highland Folk Museum	Full	05/05/2021	MAG	HI	Highland	Free
LA	The National Wallace Monument	Full	26/04/2021	OHP	AR	Stirling	Paid
P	The Old Byre Heritage Centre	Full	03/05/2021	HC	AR	Argyll & Bute	Paid
P	The Scottish Crannog Centre	Partial	26/04/2021	Z	HI	Highland	Paid
NTS	Threave Garden	Partial	02/04/2021	G	DG	Dumfries & Galloway	Paid
P	Timespan Heritage Centre	Full	17/05/2021	MAG	HI	Highland	Paid
NTS	Torridon Countryside Centre			ON	HI	Highland	Free
CT	Trades Hall	Partial	01/07/2021	HH	GG	Glasgow City	Free
P	Traquair House	Full	01/05/2021	HH	SB	Scottish Borders	Paid
HS	Trinity House Maritime Museum	Partial	Between May and August	MAG	ED	Edinburgh, City of	Free
P	Tullibardine Distillery	Full	26/04/2021	D	PE	Perth & Kinross	Paid
CT	Ullapool Museum Trust	Partial	30/04/2021	MAG	HI	Highland	Paid
O	University of Dundee Botanic Garden	Partial	15/07/2020	G	AN	Dundee City	Paid
HS	Urquhart Castle	Partial	30/04/2021	C	HI	Highland	Paid
CT	V&A Dundee	Partial	01/05/2021	MAG	AN	Dundee City	Free

Table 2.2 Scottish Visitor Attractions Remaining Closed in 2021 (in alphabetical order)

<i>Owner</i>	<i>Attraction Name</i>	<i>Category</i>	<i>VS Region</i>	<i>Council</i>	<i>Free/Paid</i>
HS	Argyll's Lodging	HH	AR	Stirling	Paid
NTS	Bachelors Club	HH	AY	South Ayrshire	Free
HS	Balvenie Castle	C	AB	Moray	Paid
HS	Bonawe Iron Furnace	OHP	AR	Argyll & Bute	Paid
HS	Brough of Birsay	OHP	OR	Orkney Islands	Paid
HS	Cairnpapple Hill	OHP	ED	West Lothian	Paid
HS	Cardoness Castle	C	DG	Dumfries & Galloway	Paid
HS	Corgarff Castle	C	AB	Aberdeenshire	Paid
HS	Craignethan Castle	C	GG	South Lanarkshire	Paid
HS	Crichton Castle	C	ED	Midlothian	Paid
HS	Crossraguel Abbey	OHP	AY	South Ayrshire	Paid
HS	Dallas Dhu	D	AB	Moray	Paid
CT	Fraserburgh Heritage Centre	MAG	AB	Aberdeenshire	Paid
HS	Glenluce Abbey	OHP	DG	Dumfries & Galloway	Paid
HS	Hackness Battery & Martello Tower	OHP	OR	Orkney Islands	Paid
HS	Hermitage Castle	C	SB	Scottish Borders	Paid
NTS	House of Binns	HH	ED	West Lothian	Paid
HS	Inchmahome Priory	OHP	AR	Stirling	Paid
NTS	Killiecrankie Visitor Centre	ON	PE	Perth & Kinross	Free
HS	Kisimul Castle	C	OH	Eilean Siar	Paid
NTS	Leith Hall	HH	AB	Aberdeenshire	Paid
HS	Loch Leven Castle	C	PE	Perth & Kinross	Paid
HS	Maclellan's Castle	C	DG	Dumfries & Galloway	Paid
HS	Meikle Sculptured Stone Museum	MAG	AN	Perth & Kinross	Paid
CT	Mull of Galloway Experience	OHP	DG	Dumfries & Galloway	Paid
HS	New Abbey Corn Mill	OHP	DG	Dumfries & Galloway	Paid
HS	Newark Castle	C	GG	Inverclyde	Paid
RO	Paisley Abbey	WS	GG	Renfrewshire	Free

HS	Seton Collegiate Church	OHP	ED	East Lothian	Paid
CT	Sma Shot cottages	HC	GG	Renfrewshire	Free
HS	Smailholm Tower	OHP	SB	Scottish Borders	Paid
NTS	Souter Johnnies Cottage	HH	AY	South Ayrshire	Free
HS	St Serfs	OHP	PE	Perth & Kinross	Free
HS	St Vigeans Museum	MAG	AN	Angus	Paid
CT	St. Peter's Heritage Centre	HC	AB	Aberdeen City	Paid
HS	Stanley Mills	OHP	PE	Perth & Kinross	Paid
HS	Sweetheart Abbey	OHP	DG	Dumfries & Galloway	Paid
HS	Threave Castle	C	DG	Dumfries & Galloway	Paid
HS	Tolquhon Castle	C	AB	Aberdeen City	Paid
O	Uig Heritage Centre	HC	OH	Eilean Siar	Paid

2.3. Additional Analysis

The information below is first to show the 2019 Scottish visitor attraction numbers in what could now be said as the last normal year in tourism for the next couple at least and secondly the extent of the impact that COVID-19 has on the Scottish Visitor Attractions in the first five months of 2020 when comparing with the same time last year.

2.3.1 Scottish Visitor Attraction Monitor 2019 - Overview

Some 678 attraction operators provided total visits figures for both years 2019 and 2018 for the whole of Scotland.

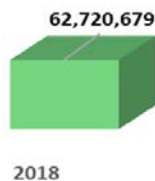
The following tables consider attraction operators who provided comparable visitor statistics for 2019 and 2018.

Table 2.2 Scottish Visitor Attraction Monitor 2019 – Overview

Admission	Sample	Visits 2019	Visits 2018	% 19/18	Diff (19-18)
Free	332	44,688,034	42,454,285	5.3	2,233,749
Paid	346	20,526,928	20,266,394	1.3	260,534
Total	678	65,214,962	62,720,679	4.0	2,494,283

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Scottish Visitor Attraction Monitor 2019/2018



Comparable
Attractions
678



Information extracted from the Moffat Centre Scottish Visitor Attraction Monitor 2019

2.3.2 Scottish Visitor Attraction Barometer: February 2021 - Overview

Some 727 attraction operators provided figures for February 2021 with 694 attractions providing comparable visits figures. The total number of visits for the responding 694 barometer attractions in Scotland for the period February 2021 was 429,326. When compared to data from the previous year of 2,591,779 visits, this shows a decrease of -83.4%.

The following tables consider attraction operators who provided comparable visitor statistics for January - February 2021 and January - February 2020.

Table 2.3 Scottish Visitor Attraction Barometer February 2021 – Overview

Admission	Sample	Visits May 2020	Visits May 2019	% 20/19	Diff (20-19)
Free	312	415,778	1,817,268	-77.1	-1,401,490
Paid	382	13,548	774,511	-98.3	-760,963
Total	694	429,326	2,591,779	-83.4	-2,162,453

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Table 2.4 Scottish Visitor Attraction Barometer January - February 2021 – Overview

Admission	Sample	Visits Jan – May 2020	Visits Jan – May 2019	% 20/19	Diff (20-19)
Free	312	816,483	3,367,767	-75.8	-2,551,284
Paid	382	23,955	1,431,200	-98.3	-1,407,245
Total	694	840,438	4,798,967	-82.4	-3,958,529

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Information extracted from the Moffat Centre Scottish Visitor Attraction Barometer – February 2021