

## 2019 ASVA ANNUAL VISITOR TREND REPORT

Useable data was received from 230 sites (excluding Country Parks). The total number of visits recorded in 2019 was 29,930,091; this compares with 29,113,222 in 2018 and indicates an increase of 2.8% for 2019.

### Acknowledgements

This is our seventh annual report which is made possible by the high proportion of members who take the time to respond to the survey. We know this annual report and the monthly reports published throughout the year are used and valued by members. So a big thank you to everyone who supplies data, thus enabling us to publish this meaningful report which clearly shows the contribution being made by our sector to the economy both locally and nationally.

Thank you also to research company STR, who designed the online survey and who collect and collate the responses on our behalf.

### Key findings for 2019

- The National Museum of Scotland (NMS) is the most visited attraction for the fourth consecutive year, recording 2,210,024 visits which is a modest decrease of 0.8% on 2018.
- Edinburgh Castle was the most visited paid for attraction with 2,116,132 visits which is an increase of 2.6%.
- The increase in visitor numbers of 2.8% in 2019 sees growth in visitor numbers across ASVA members sites for the seventh year in succession, building on the modest growth of 0.1% in 2018.
- Regional differences were on display with the West of Scotland recording the biggest increase. Both the North and South regions gained visits to a more modest degree, while the East witnessed a slight decrease.
- In 2019 the top two sites (see paragraph above) attracted more than 2 million visits each. This is the third consecutive year that these two attractions have surpassed the 2 million milestone
- In addition, four sites attracted in excess of 1 million visitors - two in Edinburgh (Scottish National Gallery and St Giles Cathedral) and two in Glasgow (Kelvingrove Art Gallery & Museum and Riverside Museum).
- Kelvingrove Art Gallery and Museum is the biggest mover in the Top 10, rising from number 6 in 2018, to number 3 in 2019.
- Edinburgh remains the number one attraction destination, with 3 of the top 5 attractions in the country and 10 sites featuring in the Top 20.
- It has also been a strong year for Glasgow, with 2 of the top 5 attractions in the country and 5 in the top 20.
- The Top 20 accounted for 62% of all visits recorded nationally (excluding country parks).
- The Top 20 collectively saw a 4.2% increase in visits.
- Reflecting a somewhat mixed year of performance, 56% of attractions reported an increase in visits whilst 44% highlighted either no change or decreases.

See overleaf for more information

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## Dashboard Summary

### Scotland Total

2019 (excl. Country Parks)	29,930,091	2.8% ▲
2019 (incl. Country Parks)	40,344,732	2.3% ▲

### Per Region

Northern Scotland	3,558,410	-1.9% ▼
*Northern Scotland †	3,035,654	2.8% ▲
Eastern Scotland	16,056,744	-1.4% ▼
Southern Scotland	1,678,725	1.0% ▲
*Southern Scotland †	1,659,808	0.9% ▲
Western Scotland	19,050,853	6.7% ▲
*Western Scotland †	9,177,885	11.5% ▲

### Per Attraction Category

Castle/heritage property/historic house	8,768,087	3.1% ▲
Museums & Galleries	12,804,190	6.7% ▲
Zoo/wildlife/safari park/aquarium	1,484,456	-6.1% ▼
Sports & activities	142,926	-9.7% ▼
Forest park/country park	10,414,641	1.0% ▲
Gardens	1,159,171	7.4% ▲
Science Centre	731,933	-0.3% ▼
Distillery/whisky related	885,752	-10.8% ▼
Visitor Centre	1,086,684	1.7% ▲
Boat Trip/Marine	1,158,755	-3.9% ▼
Other	1,708,137	-4.4% ▼

### Expenditure Figures

Ticket SPV	£4.92 (86)	-3.9% ▼
Spent per ticket sold	£11.39 (18)	0.1% ▲
Retail SPV	£1.69 (96)	0.02% ▲
Catering SPV	£1.47 (16)	-0.1% ▼

\* † Excluding Country Parks

## Behind the Headlines

- Although reporting a fairly modest increase in visitor figures of 2.8% (excluding country parks), it should be remembered that the overall picture is one of sustained growth, with ASVA member attractions recording an overall increase in visitor numbers for the 7<sup>th</sup> consecutive year.
- Brexit uncertainty undoubtedly had an impact on visitor numbers, with trips from European visitors to Scotland down in 2019. To balance this up however, over the same period there has been a reported increase in domestic trips. This is somewhat reflected in the visitor numbers seen at ASVA member attractions, with many of those sites that usually enjoy a high percentage of European visitors reporting either flat visitor numbers or modest decreases for the year, whilst those that have more of a domestic market often reporting bigger increases.
- In general, 2019 has been a good year for Glasgow attractions, with 2 sites in the top 5 and 5 in the top 20 this year. Most notably Kelvingrove Art Gallery and Museum has led the way with a 74% increase in visitors, with hugely successful exhibitions and programmes such as 'Dippy on Tour' and 'Leonard Da Vinci: A Life in Drawing' contributing to the increase in visitor numbers at this already very popular site.
- 2019 saw investment and innovation at a number of sites, nowhere more significantly than at The Hill House, where the hugely innovative and world leading conservation project, the Hill House Box, saw visitors flock to the site to experience something truly unique. An increase in visitor numbers of +139% provides clear evidence that visitors are always on the lookout for new, innovative, memorable experiences.

## About the results

Only where directly comparable data is available, are sites included in the calculations and listings. Thus some sites have been excluded because the counting method has changed year on year or if the site was closed for refurbishment for more than 40% of either of the years.

A number of sites request confidentiality and although their data is included in the calculations their visitor numbers do not appear in the published listings.

## Weather

As much as political and economic factors can have an impact on visitor numbers, it is still an undeniable fact that weather plays a key role in influencing visitor behaviour. 2019 didn't see the same extremes of weather as witnessed in 2018, but both rainfall levels (+4.9%) and sunshine levels (+5.4%) were above the long term averages. The overall average temperature for Scotland was +0.6 degrees above the long term average, with a mild winter and spring contributing to this figure. The busy summer months saw greater than usual occurrences of rain, with August in particular a very rainy month, with 90% more rainfall than the long term average. This increase in rainfall is likely to have contributed to the overall increase in visitor numbers at largely indoor sites including museums & galleries (+6.7%) and heritage attractions (+3.1%). There were, however, notable sunny periods with April and October in particular recording sunshine figures considerably above the long term average, which may have contributed to the overall increased numbers at forest & country parks (+1%) and gardens (+7.4%).

## Regional view

Visits to sites in the Northern Region (which includes local authority areas in the north east of Scotland - Aberdeen City & Shire and Moray, as well as Highland Council, Western Isles, Orkney and Shetland) showed a collective increase of 2.8%, which follows a 6.3% increase in 2018. This shows growth in this region continuing to stay ahead of the national average. This region had 2 entries in the Top 20 listing (Urquhart Castle, Glenfinnan Monument). Significant increases in numbers were experienced at Haddo House, Huntly Castle and Glenfinnan Monument.

The Eastern Region reported a slight decrease in visits of -1.4%. This can be largely (but not wholly) attributed to decreases in Top 20 sites (see P4 for listing) including National Museum of Scotland, Scottish National Gallery, St Giles' Cathedral, Edinburgh Bus Tours and Scottish National Gallery of Modern Art.

Visits to sites in the Western Region rose by 11.5% during 2019. A number of larger sites in this region had good increases: Glasgow Cathedral, Kelvingrove Art Gallery & Museum and Riverside Museum, and those will have helped lift the overall figure in this region. There are 7 sites in this region that feature in the Top 20 listing.

The Southern Region is the smallest of the four regions and indicates an increase of 0.9% over 2019 with all attractions reporting a growth in their visitor numbers. 1 site in the Southern Region is in the Top 20.

## Projections for the year ahead

When asked to comment on future performance over the next 12 months, attractions anticipated roughly the same number of customers in 2020. However, they were slightly less confident about turnover performance in 2020 compared with last year.

This year's results imply higher levels of confidence and intent to invest in marketing & advertising and buildings & infrastructure compared to last year. In fact, 30% of attractions anticipate a new or significantly increased investment in building & infrastructure. Looking at staff training for the year ahead, most businesses expected to keep staff training unchanged. (SEE P4)

## Advice and support

During 2019, nearly 9 out of 10 attractions (89%) received some form of *support, advice and/or training* from at least one external organisation which was roughly on par compared to last year. However, compared to last year, ASVA had worked with a higher proportion of attractions (67% in 2019 compared to 61% in 2018).

Just over half of the attractions (53%) attended an ASVA workshop in 2019 with a slightly higher proportion of them (55%) planning to attend one this year.

## Challenges in becoming a more environmentally friendly business

The majority of attractions expected to face at least one challenge in becoming a more environmentally friendly business. Cost implications were perceived to be the key issue with over half (52%) of attractions expecting to face this challenge.

## Brexit

Feedback suggests that attractions anticipate a shift in visitor origin as a result of Brexit. They expect a reduction in visitors from the European Union and a slight increase in local visitors from Scotland and the rest of UK.

Attractions didn't perceive the recruitment of front line staff to be a significant challenge last year.

### Data collection

The vast majority of attractions (95%) collect at least some type of information. They are most likely to gather information on spend in the shop (77%) website analytics data (72%) or ticket sales information (72%).

Encouragingly, 82% of attractions stated that they use the collected data to enhance their attraction. The development and improvement of offers and enhancement and creation of targeted marketing communication were the key areas assisted by data.

Additional support, mainly in the form case studies of other attractions use of data, would be beneficial for most (75%) attractions to help them to make better use of the data they collect.

### The Year Ahead

It is impossible to look at the year ahead and not talk about the two big issues of the moment, the Coronavirus epidemic and Brexit.

In terms of the Coronavirus, there is no data as yet to show what the impact of this epidemic may be on worldwide travel in 2020. Early indicators are that many travel plans are being put on hold, particularly, though not exclusively, for those traveling to and from Asia. It should be noted however that evidence from the SARS outbreak in 2002-2003 points to a speedy recovery once travel restrictions are lifted, with visitors rebooking their cancelled trips.

At the time of writing there have been only a few confirmed cases of Coronavirus in Scotland, though UK and Scottish Government predictions are that we will see an upturn in confirmed cases over the next few weeks. There has been some evidence of a downturn in forward bookings from certain international markets, including Italy and France, and it is likely that this will continue until the epidemic is fully under control. It should, however, be remembered that Scotland has an international reputation as being a safe place to visit and measures are in place across the country to ensure the epidemic is contained, so whilst the situation is by no means a positive one and it is a nervous time for all, the impact of the virus may be short term.

With regards to Brexit, as everyone will undoubtedly know, the UK officially left the European Union on the 31<sup>st</sup> of January 2020. Although we now have some clarity of the direction of travel now that we have left the EU, there remain major concerns about the impact on tourism in this country. The International Passenger Survey (IPS) report for the first three quarters on 2019, shows a decrease in European trips to Scotland of just under 30%, so it is fair to anticipate that we will see similar figures in 2020 now that we have actually left the EU. However, the continued weak pound and uncertainty about travel as a result of both Brexit and Coronavirus could encourage more domestic tourism and 'staycationers' in 2020, so the picture is not necessarily universally bleak when it comes to visitor numbers. Of greater concern for many is the potential impact of the UK government's new 'points based' immigration policy, which could have devastating long term effects with regards to staff recruitment within our sector. Many attractions in Scotland, including some of the most significant sites, recruit between 20-30% of staff from EU nationals. Without a change in the government's policy, there are very real

concerns that the labour market is just not there to support our sector as we continue to grow and develop. Throughout 2020, ASVA will continue to work with key industry bodies, including the Scottish Tourism Alliance and others, to make the case for a change to the current policy.

2020 is almost certainly going to be a year where sustainability is high on the agenda. A climate emergency was officially declared by both the Scottish and UK governments in 2019, and barely a day goes by where a climate change story does not feature in the national press. In November 2020, Glasgow will host the UN Climate Change Conference (COP26) and this will see the world's attention turn on Scotland. Not only will COP26 see greater attention placed on Scotland, it will also bring more visitors too, with many of these visitors looking to experience the best of our country's environmentally sustainable attractions. There has never been a more opportune time for Scotland's attractions to demonstrate their green credentials and there is little doubt that potential visitors to our sites in 2020 (and beyond) will look to see how we are helping to address the climate emergency moving forward.

Alongside sustainability, the wellness trend is likely to continue to gather pace in 2020. Last year VisitScotland reported that almost one third of UK residents see Scotland as an ideal destination for a wellness holiday, with both physical and mental wellbeing highlighted as being important when considering holiday choices.

Attractions can play a key role in wellness tourism, both from a physical and a mental health standpoint, and quite a few sites are investing in wellbeing as a driver for business success, with initiatives for both visitors and staff alike.

The major sporting event of the year will be the UEFA European Championships Finals, with Glasgow hosting three matches between Monday 15<sup>th</sup> and Tuesday 30<sup>th</sup> June. Although the event is taking place across Europe, it is still significant that Scotland is one of the 12 host countries and we are likely to see an increased number of visitors in our country and our attractions as a result.

2020 sees a number of exciting initiatives and developments in our sector. The most significant new attraction to open in 2020 will undoubtedly be the Johnny Walker Princes Street Experience in Edinburgh. The attraction is the centrepiece of a £150million investment in Scotch Whisky visitor experiences from Diageo, and promises to deliver a world-leading cultural visitor experience, bringing to life the story of the Johnny Walker brand and its makers, creating a unique welcome for millions from around the world. It is sure to be a great addition to the outstanding visitor attraction offering in our capital city. A very significant milestone will also be reached by one of the leading attractions in the country, with the Royal Botanic Garden Edinburgh celebrating its 350<sup>th</sup> anniversary. Celebrations are already well underway with a year long programme of talks, events and exhibitions, all of which are sure to encourage visitors to both the attraction and the wider region. Many attractions are also diving headfirst into the latest theme year, The Year of Coasts and Waters 2020, with a variety of events planned at sites across Scotland, including 50<sup>th</sup> anniversary celebrations at the Scottish Fisheries Museum, Marine Fest at the Scottish Seabird Centre and the Canal Festival Time Machine, running from the Kelpies to the Falkirk Wheel.

### Guide to free (F) and paid (P) entry

'F' indicates free entry and 'P' denotes where an entry charge applies. We are aware that some free attractions may charge for special exhibitions etc and that some paid admission sites will similarly have some free entry visitors which are included in their overall numbers. 'P/F' label is used for these types of attractions.



### Projections For the Year Ahead

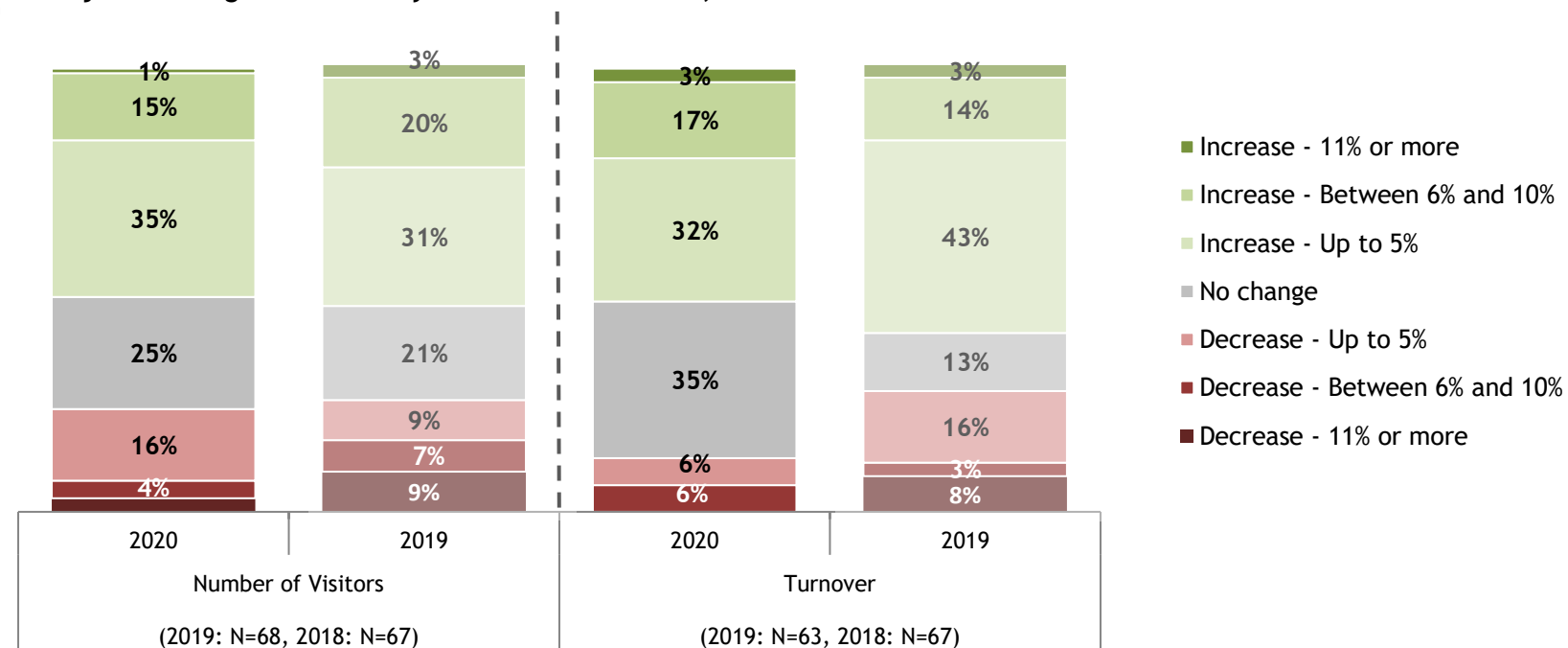
We asked attractions to indicate their projections for the year ahead. The results for this year are illustrated below along with the results from last year's survey.

When compared to last year, attractions demonstrated broadly the same levels of optimism in terms of visitor numbers. However, they were less in 2020.

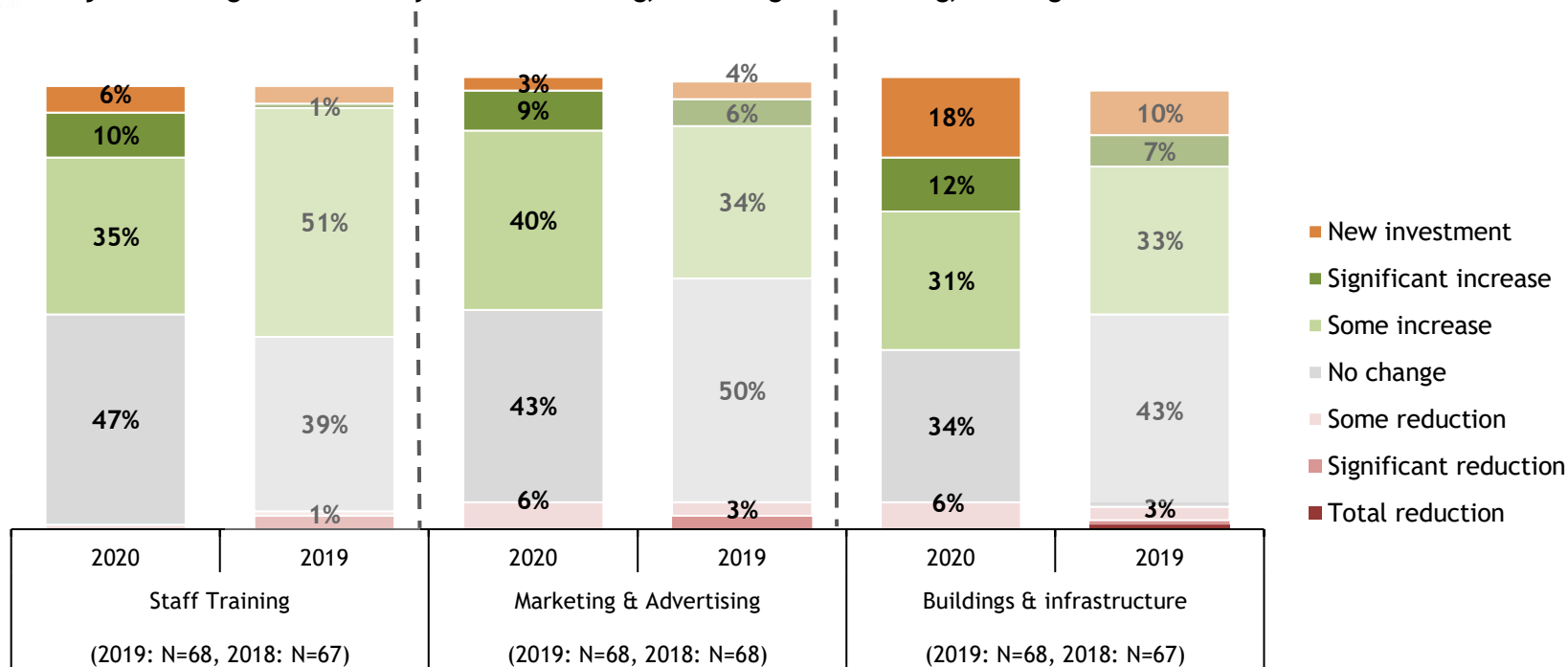
In 2020, a higher proportion of attractions anticipated increased investments in marketing and advertising and building and infrastructure compared to 2019. Meanwhile, fewer anticipated increased investment in staff training in 2020.

*Note: A number of respondents stated 'Don't Know / Not Applicable' and, hence, their response has not been factored in to the analysis below.*

#### Projected change for the next year: Number of visitors, Turnover.



#### Projected change for the next year: Staff Training, Marketing & Advertising, Buildings & Infrastructure.



### Top 20 Visitor Attractions

	2019	2018	Y-o-Y	Paid/Free*
National Museum of Scotland	2,210,024	2,227,773	-0.8%	F
Edinburgh Castle	2,166,132	2,111,578	2.6%	P
Kelvingrove Art Gallery and Museum	1,832,097	1,054,562	73.7%	F
Scottish National Gallery	1,577,946	1,739,128	-9.3%	F
Riverside Museum	1,364,739	1,254,498	8.8%	F
St Giles' Cathedral	1,217,991	1,330,816	-8.5%	F
Royal Botanic Garden Edinburgh	893,263	826,860	8.0%	F
National War Museum	805,934	798,165	1.0%	F
Old Blacksmiths Shop	772,448	770,602	0.2%	F
Edinburgh Bus Tours	614,928	702,789	-12.5%	P
Stirling Castle	606,559	604,625	0.3%	P
Gallery of Modern Art	576,689	616,533	-6.5%	F
Urquhart Castle	547,518	487,291	12.4%	P
Glasgow Cathedral	534,988	482,782	10.8%	F
Edinburgh Zoo	529,693	509,714	3.9%	P
Scottish National Gallery of Modern Art	508,090	569,937	-10.9%	F
The Falkirk Wheel	476,274	496,082	-4.0%	F/P
Glenfinnan Monument	462,235	379,255	21.9%	P
Glasgow Science Centre	394,874	402,111	-1.8%	P
Scottish National Portrait Gallery	372,743	358,312	4.0%	F

\* See p3 for further information

**Have you received any support, advice and/or training from the following organisations during 2019?**

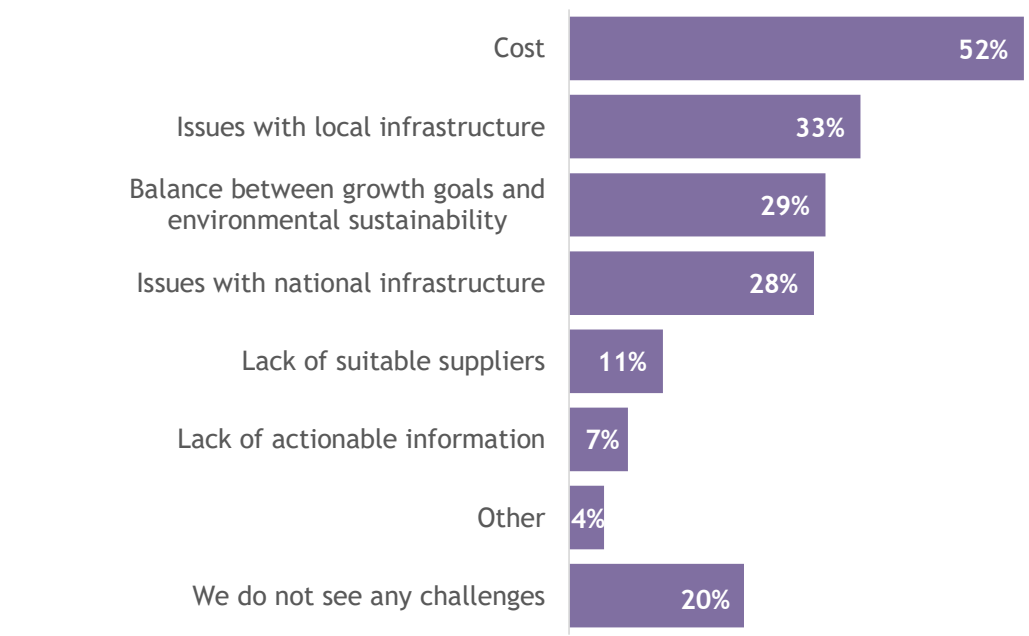
During 2019, nearly 9 out of 10 attractions (89%) have received some form of *support, advice and/or training* from at least one of the organisations listed.

Overall, ASVA provided support, advice and/or training to 67% of attractions.



**What challenges do you see in becoming a more environmentally friendly business?**

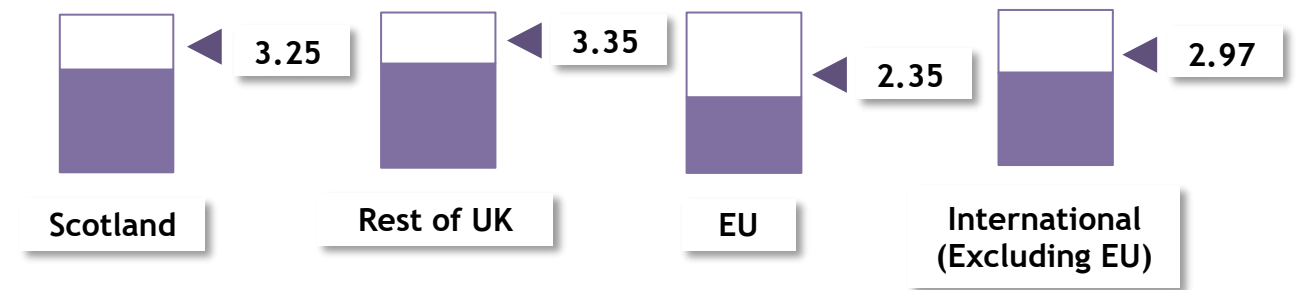
The majority of attractions (80%) believed they will face at least one of the challenges listed below with costs being the most prominent issue.



**Now that we have clarity that Brexit is happening, what effect do you see on your potential visitors for 2020?**

(1=Large decrease, 5=Large increase)

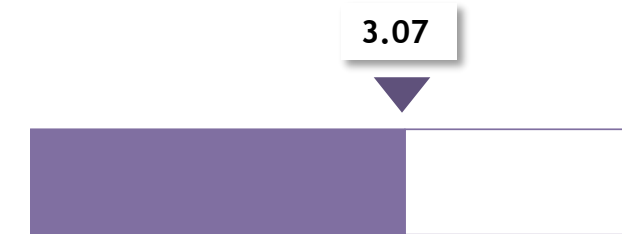
Attractions highlighted a moderate impact of Brexit on their potential visitors. They felt that there will be a slightly positive shift in visitors from Scotland and the rest of UK and a negative shift in visitors from the European Union in 2020.



**How challenging have you found recruitment of front line staff in 2019?**

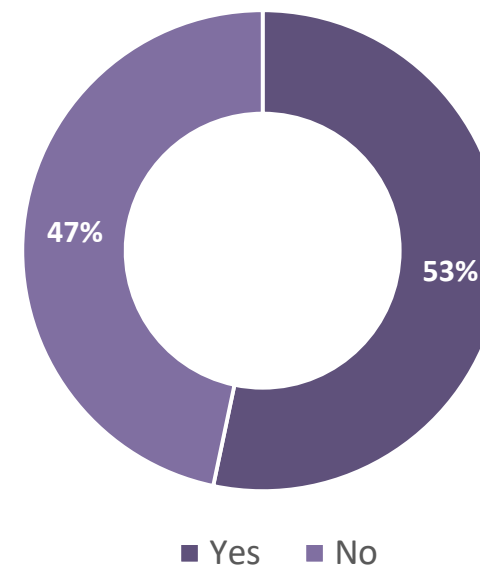
(1=Not at all challenging, 5=Very challenging)

Overall, attractions didn't perceive the recruitment of front line staff to be a significant challenge in 2019.



**Did you attend an ASVA workshop or event in 2019?**

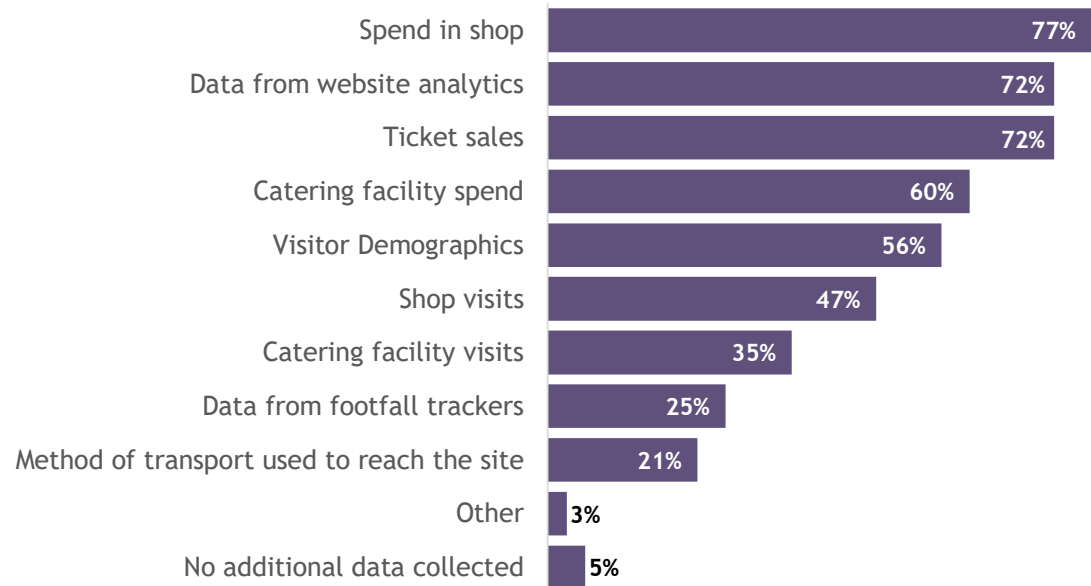
Just over half of the attractions (53%) attended an ASVA workshop in 2019 with a slightly higher proportion of them (55%) planning to attend one this year.



**55%** of attractions are likely to attend an ASVA event/workshop this year.

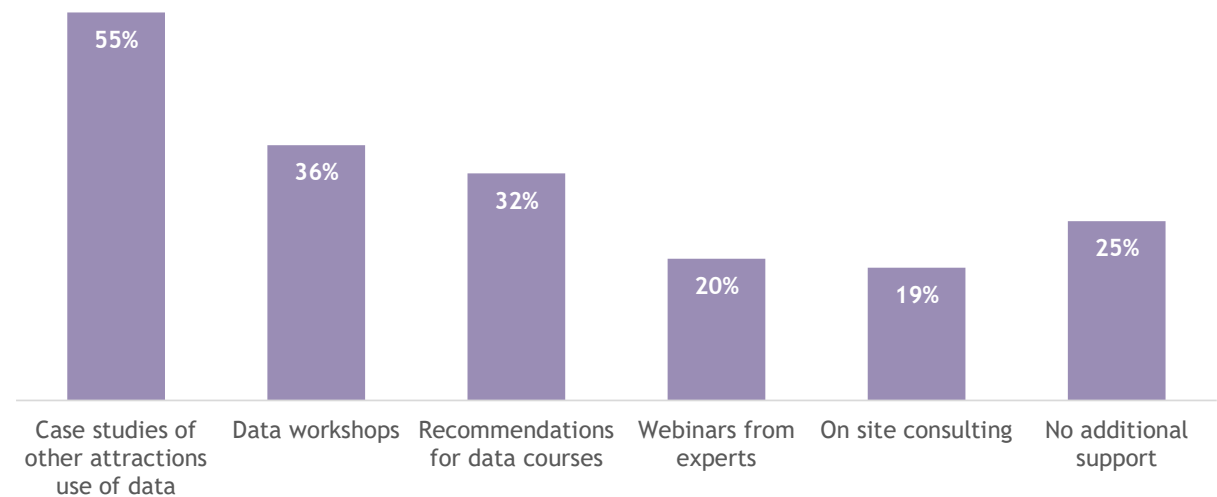
**Apart from visitor numbers, what data do you currently gather at your attraction?**

Overall, the vast majority of attractions (95%) collect at least one information type. The most common information types are spend in shop (77%), data from website analytics (72%) or ticket sales (72%).



**What, if any, additional support would you like to receive to make better use of data to enhance your attraction?**

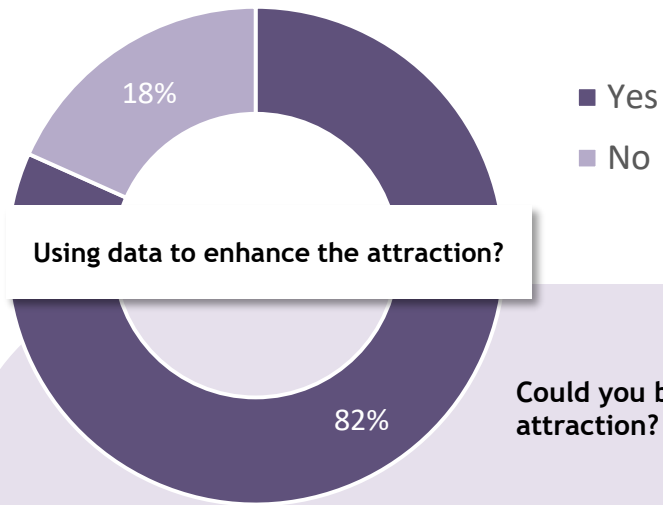
Additional support in the form of case studies of other attractions data use was deemed most beneficial.



**Do you make use of the data that you collect to enhance your attraction e.g. adjust ticket prices, reconfigure floor space etc.?**

More than 8 out of 10 attractions make use of the data they collect to enhance their attraction.

The most cited areas of data use were development and improvement of offerings and enhancement and creation of targeted marketing communication.



Using data to enhance the attraction?

**Could you briefly describe how you have used data to enhance your attraction?**

“ Years of gathering data has been vital in supporting recent funding applications for our major redevelopment project. ”

“ We can identify what works in terms of marketing and use this to promote new activities. Can identify busy and quiet periods so we can put out offers accordingly. ”

“ Ticket pricing adjustments, promotional calendar weighting to different demographics and trading periods, show adjustments in response to show scoring. ”

“ To inform the constant improvement of services and facilities. ”

“ Make exhibit improvements, alter opening times to suit seasonality, update online communications (social media/website), installing online ticketing. ”

“ We have adjusted web content based on Google Analytics for some of our sites. ”

## Additional Comments 2019

### Positive influences

**Braemar Castle** "We've had a great year with visitor numbers up just over 10%. Braemar has received a huge amount of publicity through the newly re-opened Fife Arms Hotel. Additionally, with the opening of the Braemar Highland Games Centre, the village can now offer visitors a range of attractions."

**Callendar House** "Year is slightly up on 2018, particularly in visitor numbers and that has had a positive effect on our revamped retail offer. Staffing and material costs in catering are still challenging and we have responded by reviewing and relaunching a revised service model in 2020."

**Glasgow Science Centre** "Financial year 2019 was slow to start due to exceptionally good weather conditions. The rest of the year was more 'typical' with good numbers in October mid term. GSC continues to work on developing and implementing the Inspiring Science Funded programme Connect. Connect aims to open new doors and build relevant pathways to learning for Glasgow's diverse and broad population; positioning GSC as an essential part of the city's cultural life and as a powerful advocate for personal advancement and scientific enterprise. Connect will be delivered through 6 interconnected work packages including a programme of Community Learning and Development engagement; a programme of inclusive cultural science events; and a transformation of the built environment."

**Rosslyn Chapel** "Good year for us with TV coverage (Channel 5 Secret Scotland) helping a lot."

**Scottish Dolphin Centre** "It has been another busy year at the Centre - in 2018 we were open longer, until mid-Dec as opposed to closing at the end of October and in 2019 we were open again mid-February for 5 days a week instead of just weekends."

**St Giles' Cathedral** "2019 went as expected. we changed the visitor flow, with the aim of engaging visitors more. We think this turned some of the more casual visitors away- hence the drop from 2018."

### Negative influences

**Centre for Contemporary Arts** "Centre for Contemporary Arts was closed from June to October 2018, following a fire at Glasgow School of Art. The figures for 2018 include this period of no access to the building."

**Edinburgh Bus Tours** "Extensive city centre road closures affected our summer figures, winter weekend closure of Waverley Bridge due to Christmas Market reduced visibility of tours and footfall."

**Edinburgh Zoo** "Had a few bad weather days that ended up with the site being closed. Please note that these figures do not include the Lantern Festival visitors which up until the end of 2019 was sitting at 37466 visitors."

**Gallery of Modern Art** "A new camera counting system was installed in GoMA in 2019. Subsequent data analysis across a range of performance measures has brought the accuracy of the camera into question. The robustness of the camera counter is currently being investigated as a result. The number of visits to GoMA from March to December 2019 therefore, are estimated counts based on 10 years of historical data. Glasgow Museums, in partnership with The Hunterian/University of Glasgow also delivered the T- Rex Exhibition at Kelvin Hall, attracting 47,935 across its run from 18.04.19 to 31.07.19."

**The Hunterian Museum and Art Gallery** "We had a short closure between exhibitions in The Hunterian Art Gallery which meant lower visitor figures. Also the Mackintosh House had a partial closure which meant sales income slightly reduced."

### Site-specific Report 2019

- Responses for 2019 were received from 233 sites (incl. Country Parks); 8 sites requested confidentiality, and although their numbers have been included in the calculations, they do not appear in the tables below. 8 sites have not submitted results for 2018 and thus do not appear in the tables below.

	2019	2018	Y-o-Y	Paid/Free*		2019	2018	Y-o-Y	Paid/Free*
Aberdour Castle	24768	27507	-10%	P	Craigmillar Castle	40634	35473	15%	P
Aberlour Distillery	13646	12993	5%	P	Craignethan Castle	5005	5306	-6%	P
Alloa Tower	6561	6759	-3%	P	Crarae Garden	12779	8928	43%	P
Almond Valley Heritage Trust	135620	127341	7%	P	Crathes Castle, Garden & Estate	153217	129620	18%	P
Arbroath Abbey	13801	17060	-19%	P	Crichton Castle	2665	3158	-16%	P
Arduaine Garden	13247	9769	36%	P	Crossraguel Abbey	1229	2045	-40%	P
Auchindrain	4184	4121	2%	P	Culloden Battlefield visitor centre	209011	207592	1%	P
Bachelors' Club	776	845	-8%	F	Culzean Castle and Country Park	333965	317875	5%	P
Balvenie Castle	8076	8325	-3%	P	Dallas Dhu Distillery	11704	12757	-8%	P
Bannockburn	43427	46976	-8%	P	Dalwhinnie Distillery Visitor Centre	58747	59959	-2%	P
Barry Mill	8781	6371	38%	P	Dawyck Botanic Garden	37051	35622	4%	P
Benmore Botanic Garden	53420	48859	9%	P	Dirleton Castle	31883	29764	7%	P
Bishops & Earls Palaces	18217	19999	-9%	P	Discovery Point	86380	64627	34%	P
Black House	15174	16221	-6%	P	Doone Castle	152987	142091	8%	P
Blackness Castle	79265	58388	36%	P	Drum Castle, Garden & Estate	53936	50849	6%	P
Blair Athol Distillery Visitor Centre	74233	80848	-8%	P	Drumpellier Country Park	949807	938939	1%	F
Bonawe Iron Furnace	2612	4682	-44%	P	Dryburgh Abbey	19590	18586	5%	P
Bothwell Castle	12343	10701	15%	P	Dumbarton Castle	29197	28546	2%	P
Braemar Castle	14424	13026	11%	P	Dumfries Museum & Camera Obscura	18430	16527	12%	F
Branklyn Garden	14115	12315	15%	P	Dunblane Cathedral	16620	17972	-8%	P
British Golf Museum	253131	241377	5%	P	Dundrennan Abbey	3531	3818	-8%	P
Brodick Castle & Country Park	68423	41353	65%	P	Dunfermline Palace	22860	19372	18%	P
Brodie Castle	79634	267199	-70%	P	Dunstaffnage Castle	25429	21957	16%	P
Broughton House & Garden	18917	17691	7%	P	Edinburgh Bus Tours	614928	702789	-13%	P
Caerlaverock Castle	39143	35305	11%	P	Edinburgh Castle	2166132	2111578	3%	P
Cairnpapple Hill	1662	2614	-36%	P	Edinburgh Zoo	529693	509714	4%	P
Calderglen Country Park	1055606	975167	8%	F	Edzell Castle	6462	6592	-2%	P
Callendar House	62465	61043	2%	F	Elcho Castle	7439	6862	8%	P
Caol Ila Distillery Visitor Centre	10148	15051	-33%	P	Elgin Cathedral	37979	39398	-4%	P
Cardhu Distillery Visitor Centre	13541	15157	-11%	P	Falkland Palace & Garden	49329	48209	2%	P
Cardoness Castle	4479	4945	-9%	P	FC Scotland - Clatteringshaws Visitor Centre	43192	50796	-15%	F
Castle Campbell	19319	18403	5%	P	FC Scotland - Glenmore Visitor Centre	122854	119157	3%	F
Castle Fraser, Garden & Estate	56822	50805	12%	P	FC Scotland - Glentress	241146	246743	-2%	F
Centre for Contemporary Arts	315431	211130	49%	F	FC Scotland - Glentool Visitor Centre	45406	47791	-5%	F
Chatelherault Country Park	677254	634274	7%	F	FC Scotland - Kirroughtree Visitor Centre	76650	73973	4%	F
City Art Centre	98567	67250	47%	F	FC Scotland - The Lodge Forest Visitor Centre	135780	131765	3%	F
Clynelish Distillery Visitor Centre	8668	8766	-1%	P	Fort George	76169	71906	6%	P
Corgarff Castle	3913	3512	11%	P	Fyvie Castle	66039	59019	12%	P
Cragganmore Distillery Visitor Centre	8451	8011	5%	P	Gallery of Modern Art	576689	616533	-6%	F
Craigievar Castle	24072	20176	19%	P					

\* See p3 for further information



	2019	2018	Y-o-Y	Paid/Free		2019	2018	Y-o-Y	Paid/Free
Geilston Garden	13778	12578	10%	P	Lagavulin Distillery Visitor Centre	31862	24019	33%	P
Georgian House	32127	34419	-7%	P	Lauriston Castle	107760	115291	-7%	P
Gladstone's Land	20065	12051	67%	P	Linlithgow Palace	103312	94718	9%	P
Glasgow Cathedral	534988	482782	11%	F	Loch Leven	15914	13943	14%	P
Glasgow Museums Resource Centre	17232	17441	-1%	F	Logan Botanic Garden	28761	25186	14%	P
Glasgow Science Centre	394874	402111	-2%	P	Macduff Marine Aquarium	50269	52572	-4%	P
Glen Ord Distillery Visitor Centre	45411	39905	14%	P	Mackintosh Queen's Cross	570	1649	-65%	P
Glenfinnan Monument	462235	379255	22%	P	Maclellans Castle	3464	4025	-14%	P
Glenkinchie Distillery Visitor Centre	46782	44392	5%	P	Malleny Garden	4460	3290	36%	P
Glenluce Abbey	919	850	8%	P	Meigle Museum	2370	2441	-3%	P
Grampian Transport Museum	24064	25345	-5%	P	Melrose Abbey	61325	58286	5%	P
Greenbank Garden	21715	16461	32%	P	Moirlanich Longhouse	1139	1078	6%	P
Gurness Broch	11303	13855	-18%	P	Mount Stuart	42809	44017	-3%	P
Hackness	802	1150	-30%	P	Mugdock Country Park	639620	636744	0%	F
Haddo House	24380	15202	60%	P	Museum of Childhood	185394	161778	15%	F
Hermitage Castle	5768	5781	0%	P	Museum of Edinburgh	120938	99595	21%	F
Highland Folk Museum - Newtonmore	72265	76195	-5%	F	Museum of Lead Mining	7542	7907	-5%	P
Highland Safaris	42646	39684	7%	P	National Museum of Flight	74696	79573	-6%	P
Highland Wildlife Park	142484	205930	-31%	P	National Museum of Rural Life	113525	100241	13%	P
Hill of Tarvit Mansionhouse & Garden	7093	5050	40%	P	National Museum of Scotland	2210024	2227773	-1%	F
Holmwood	7119	4721	51%	P	National War Museum	805934	798165	1%	F
House for an Art Lover	10645	12144	-12%	P	Nevis Range	142926	158350	-10%	P
House Of Dun	10342	7445	39%	P	New Abbey Corn Mill	4456	4179	7%	P
Hugh Miller Museum & Birthplace Cottage	3645	3993	-9%	P	Newark Castle	6250	6571	-5%	P
Huntingtower Castle	9309	8033	16%	P	Newhailes	65395	69727	-6%	P
Huntly Castle	13647	9384	45%	P	Oban Distillery Visitor Centre	57031	62956	-9%	P
Inchcolm Abbey	19221	19445	-1%	P	Old Blacksmiths Shop	772448	770602	0%	F
Inchmahome Priory	16096	20007	-20%	P	Our Dynamic Earth	337059	331882	2%	P
Inveraray Castle	126000	121377	4%	P	Palacerigg Country Park	592838	583032	2%	F
Inveresk Lodge Garden	3010	3627	-17%	P	Pitmedden Garden & Museum of Farm Life	48106	43757	10%	P
Inverewe Garden & Estate	76351	84345	-9%	P	Pollok House	57099	58457	-2%	P
Iona Abbey	65092	65092	0%	P	Preston Mill & Phantassie Doocot	2590	3124	-17%	P
J M Barrie's Birthplace	2777	2260	23%	P	Provand's Lordship	94481	89416	6%	F
Jacobite Cruises Ltd	325210	318246	2%	P	Queensferry Museum	5767	6100	-5%	F
Jarlshof	22439	23244	-3%	P	Riverside Museum	1364739	1254498	9%	F
Jedburgh Abbey	29484	27489	7%	P	Robert Burns Birthplace Museum	261283	271137	-4%	P
John Gray Centre	144178	145885	-1%	F	Robert Burns Centre	31091	35891	-13%	P
Johnstons of Elgin	177481	171269	4%	F	Robert Burns House	14402	13304	8%	P
Kellie Castle & Garden	18938	17804	6%	P	Robert Smail's Printing Works	1726	1577	9%	P
Kelpies Tours	22217	18115	23%	P	Rossllyn Chapel	196524	192149	2%	P
Kelvingrove Art Gallery and Museum	1832097	1054562	74%	F	Rothesay Castle	10912	11209	-3%	P
Kildrummy Castle	3684	4128	-11%	P	Royal Botanic Garden Edinburgh	893263	826860	8%	F
Kisimul Castle	5855	6660	-12%	P	Royal Lochnagar Distillery Visitor Centre	22995	22398	3%	P

	2019	2018	Y-o-Y	Paid/Free		2019	2018	Y-o-Y	Paid/Free
Scotland Street School Museum	65464	61846	6%	F	Threave Castle	11591	15772	-27%	P
Scotland's Secret Bunker	31265	28469	10%	P	Threave Estate	120840	97330	24%	P
Scottish Crannog Centre	25429	21212	20%	P	Tolquhon Castle	5237	5160	1%	P
Scottish Dolphin Centre	94984	92060	3%	P	Tomatin Distillery Visitor Centre	33616	55479	-39%	P
Scottish Fisheries Museum	96832	95659	1%	P	Trinity House	41	243	-83%	F
Scottish National Gallery	1577946	1739128	-9%	F	Urquhart Castle	547518	487291	12%	P
Scottish National Gallery of Modern Art	508090	569937	-11%	F	Verdant Works	20941	19993	5%	P
Scottish National Portrait Gallery	372743	358312	4%	F	Weaver's Cottage	1737	1653	5%	P
Scottish Seabird Centre	226348	267559	-15%	F/P	Writers Museum	86863	73832	18%	F
Seton Collegiate	1795	2091	-14%	P					
Skara Brae	115136	112921	2%	P					
Smailholm Tower	3948	4286	-8%	P					
Souter Johnnie's Cottage	3333	3915	-15%	F					
Spynie Palace	6395	7411	-14%	P					
St Andrews Castle	88814	91302	-3%	P					
St Andrews Cathedral	54511	56250	-3%	P					
St Cecilia's Hall	16680	19286	-14%	F					
St Giles' Cathedral	1217991	1330816	-8%	F					
St Serfs	2463	2038	21%	P					
St Vigean's	737	827	-11%	P					
Stanley Mills	9266	8966	3%	P					
Stirling Castle	606559	604625	0%	P					
Stirling Smith Art Gallery and Museum	35530	38778	-8%	F					
Strathclyde Country Park	5611099	5521268	2%	F					
Summerlee Museum	187300	176803	6%	F					
Sweetheart Abbey	325	5335	-94%	P					
Talisker Distillery Visitor Centre	59383	62459	-5%	P					
Tantallon Castle	45798	43170	6%	P					
Tenement House	23456	17693	33%	P					
The Black Watch Castle and Museum	97989	102353	-4%	P					
The Falkirk Wheel	476274	496082	-4%	F/P					
The Famous Grouse Experience	55882	66450	-16%	P					
The Hill House	31172	13034	139%	P					
The Hunterian Museum and Art Gallery	175132	181068	-3%	F					
The Nelson Monument	64678	56288	15%	P					
The People's Palace Museum	223774	342577	-35%	F					
The People's Story	64072	45581	41%	F					
The Royal Yacht Britannia	357271	390848	-9%	P					
The Scotch Whisky Experience	318152	386876	-18%	P					
The Scott Monument	23338	57829	-60%	P					
The Scottish Parliament	273201	282425	-3%	F					
The St Mungo Museum of Religious Life and Art	159157	144361	10%	F					
Thomas Carlyle's Birthplace	2375	509	367%	P					