

Impact of Covid-19 on Scottish Visitor Attractions

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

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1 PROJECT BRIEF

1.1. Aims and Objectives

The aim of the project is to provide visitor attraction intelligence on the impact of COVID-19 on Scottish visitor attractions 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 re-opening of the tourism industry, the Moffat Centre and ASVA asked all Scottish attractions to complete a brief survey to provide data on the impact that Covid-19 has had on their attraction(s).

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 end of September 2020. The following sections of the report present the findings graphically and in tabular format.

2 SURVEY DATA ANALYSIS

2.1.1 Responding sample

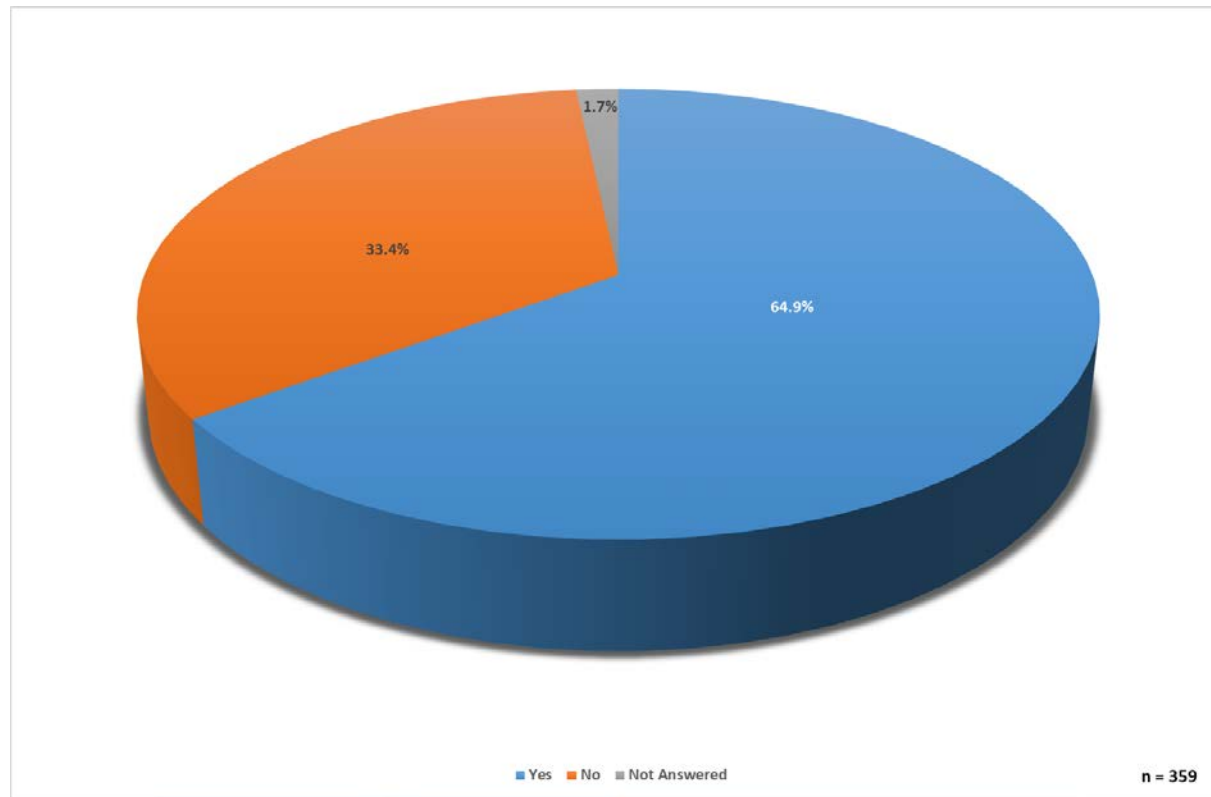
The online survey was sent out by email to 776 Scottish visitor attractions with respondents being asked to provide data in relation to the impact of Covid-19 on their attraction(s). A total of 359 surveys were completed over a fifteen-day period in September/October 2020, which equates to a 46.3% response rate.

2.2. Attraction Information

2.2.1 Attractions open prior to lockdown

Figure 2.1 below presents the 'prior to lockdown status' of all respondents. Of the 359 respondents who were asked if their attraction was open prior to lockdown, 64.9% of respondents stated that their attraction was open, with just over a third indicating that their attraction was closed prior to lockdown.

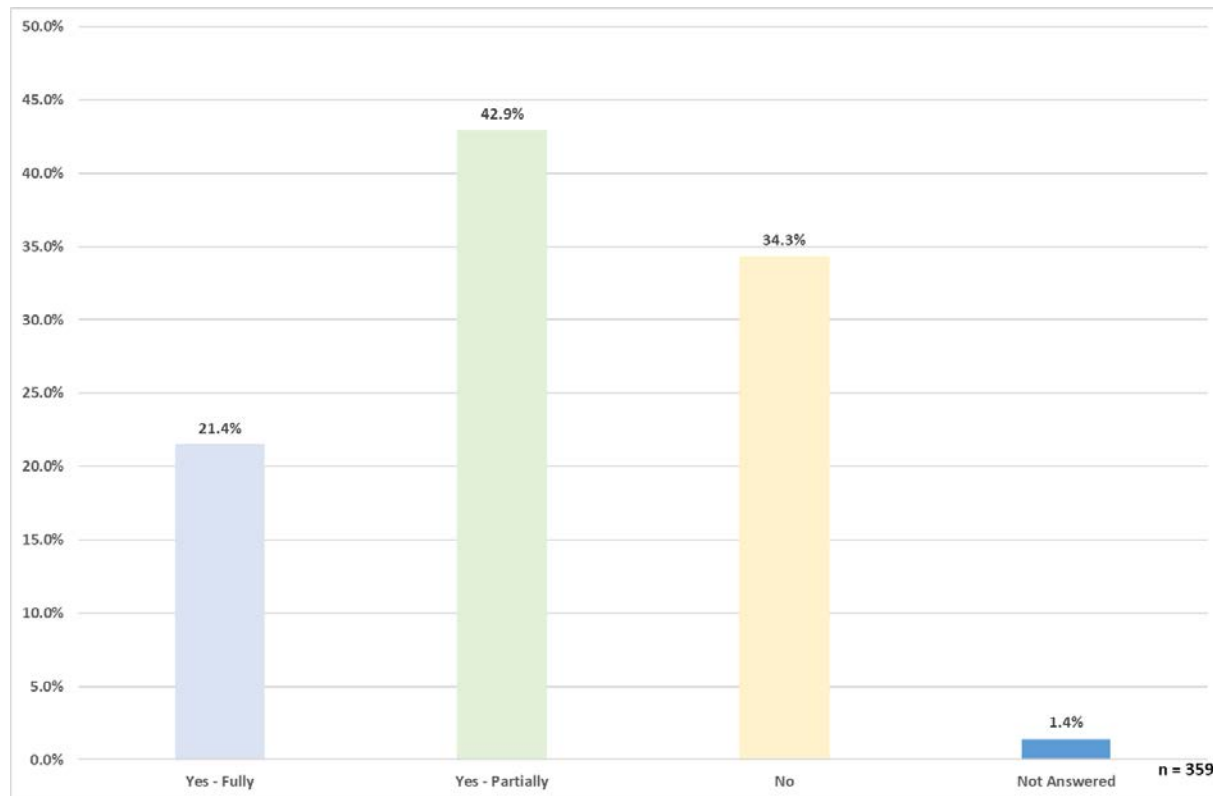
Figure 2.1 Attractions Open Prior to Lockdown



2.2.2 Re-opening Post Lockdown

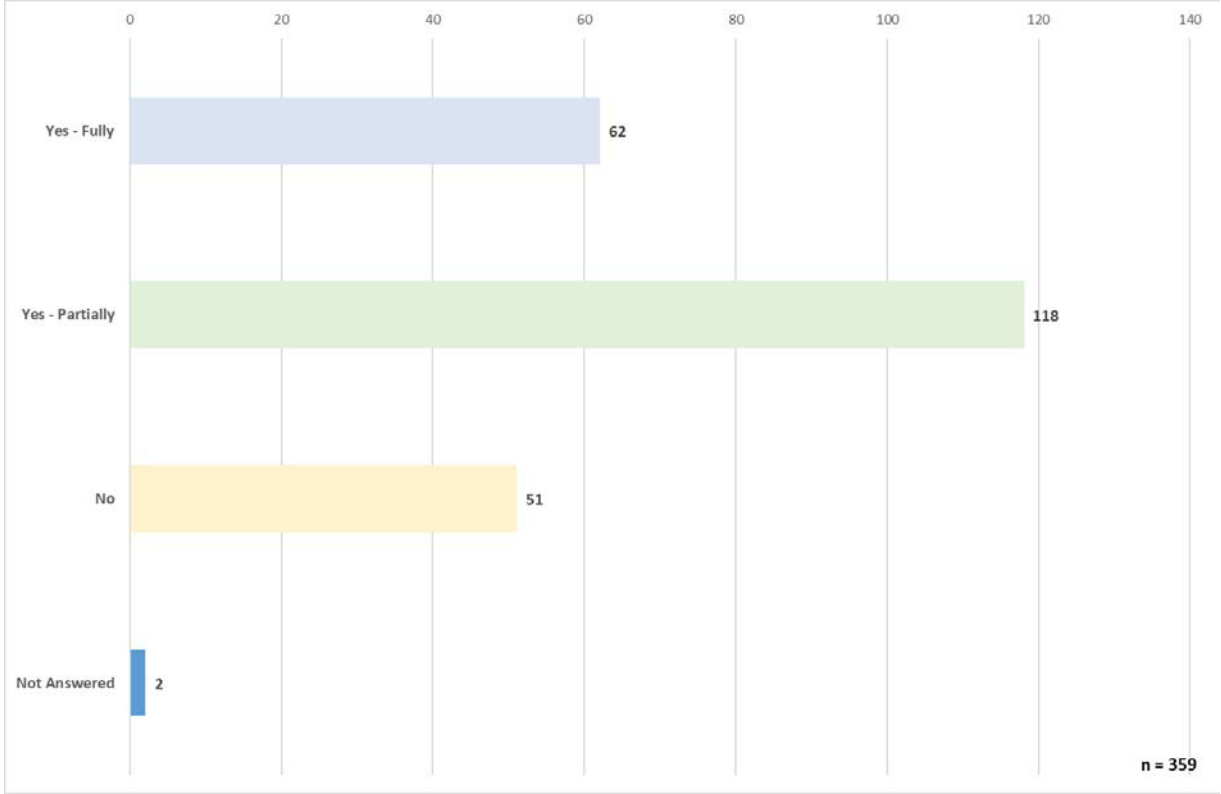
Figure 2.2 below presents the 're-opening post lockdown status' of all respondents. The majority of visitor attractions (64.3%) have re-opened with just over a fifth opening fully. Of those that have re-opened, two thirds have done so partially (42.9%) and just over a third of attractions (34.3%) have not re-opened.

Figure 2.2 Attractions Open Post Lockdown



As shown in Figure 2.1, 233 (64.9%) of respondents stated that their attraction was open prior to lockdown, over three quarters have now re-opened post lockdown, however just over a fifth of attractions open prior to lockdown have indicated they have not re-opened.

Figure 2.3 Attractions Open Prior to and Re-Opened Post Lockdown



2.2.3 Date of Re-opening

Respondents who stated they had opened post lockdown were asked which month they re-opened. Figure 2.4 shows a breakdown by month when the attractions opened, over 80% of the respondents had opened by the end of August.

Figure 2.4 Month of Re-opening

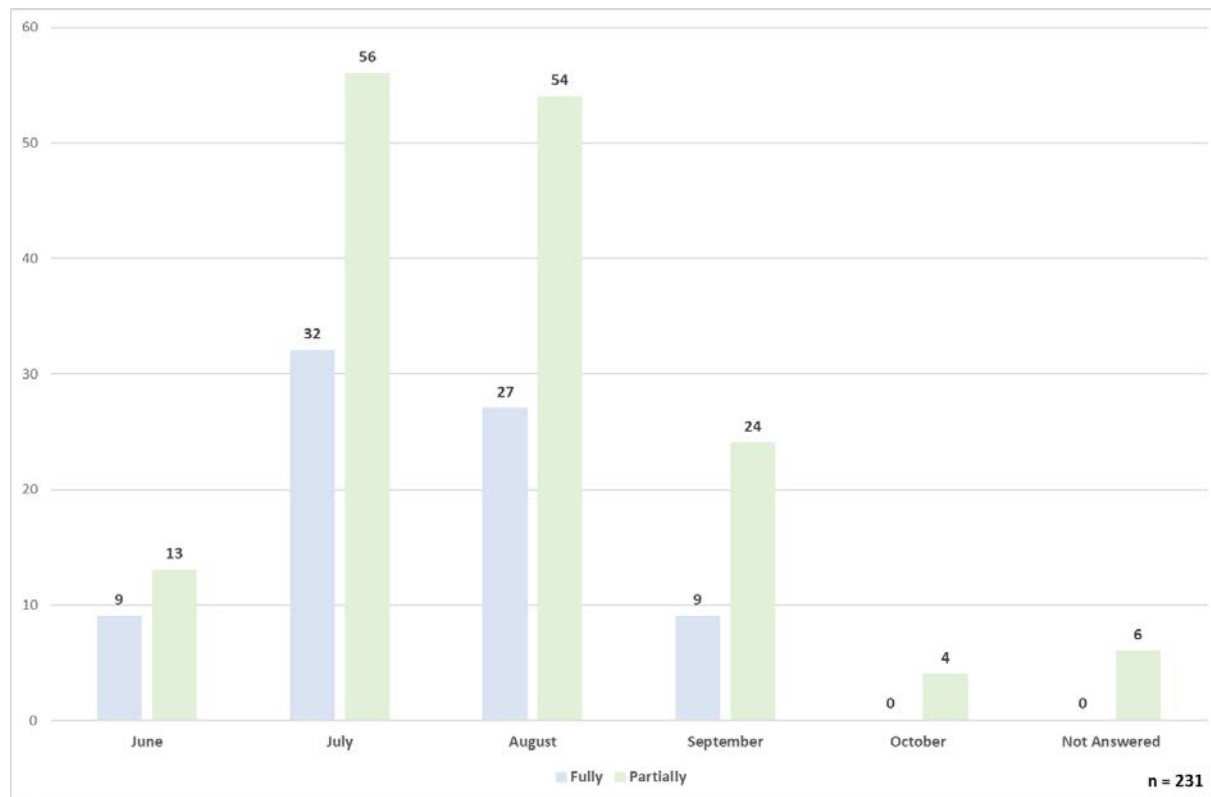
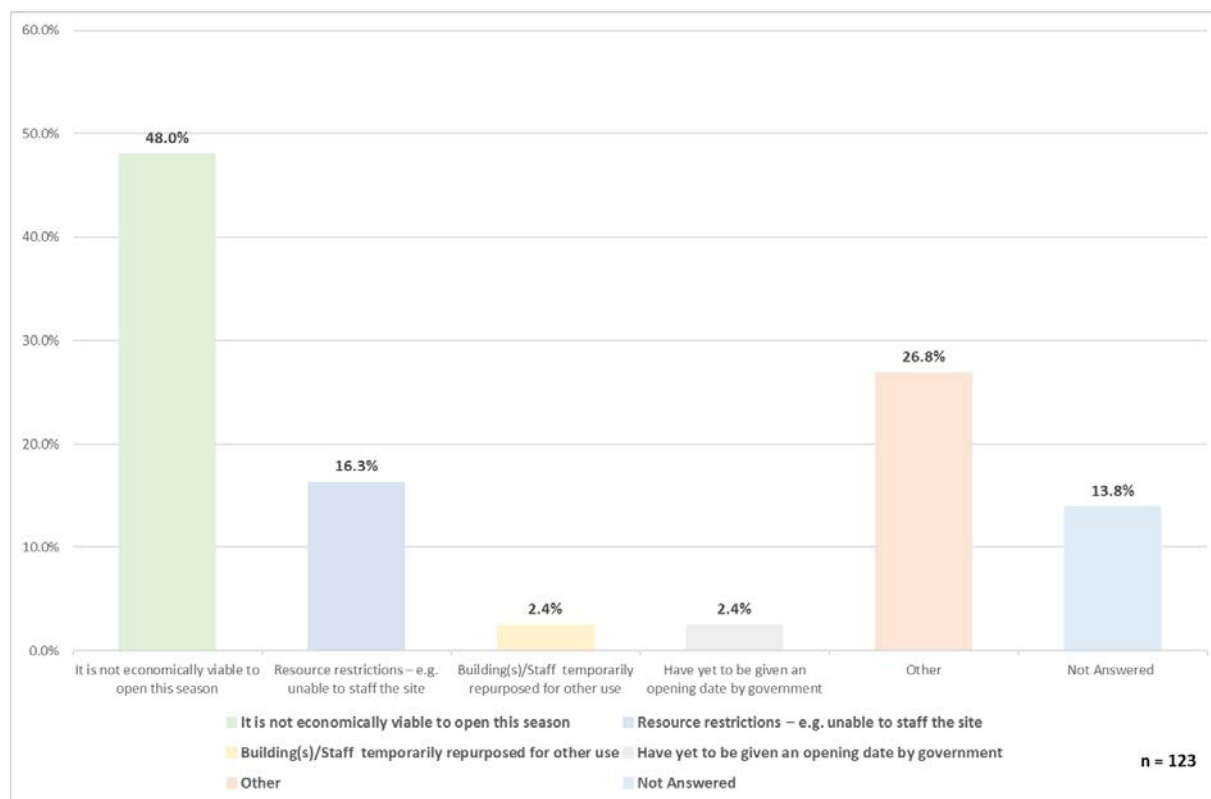


Figure 2.2 identified that 123 respondents had not re-opened their attraction; those respondents were requested to provide a reason(s) 'why they had not re-opened'. The findings indicate that the key factor for not re-opening in 2020 was due to it being not economically viable (figure 2.5).

Figure 2.5 Reasons for not Re-Opening



Note: Respondents could select more than one answer, hence total % > 100%.

Table 2.1 below shows the key comments submitted as Other reason(s) for not re-opening.

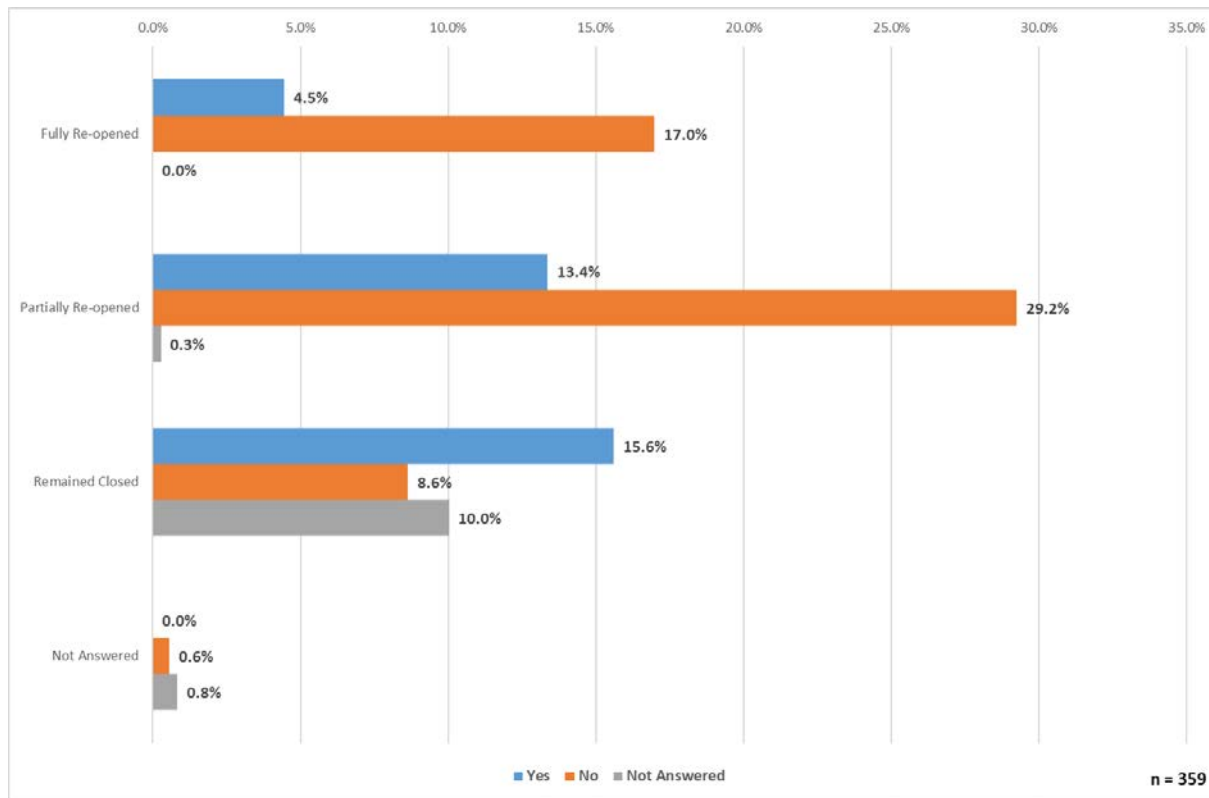
Table 2.1 'Other' Reason(s) for not Re-Opening

Reason	Reason
Health & Safety of staff and visitors	Requirements for PPE will have to be assessed
Majority of our volunteers are in vulnerable age-group	Keeping exhibits sanitised is too difficult
No visitors about	Building closed by council
Consumer confidence low	Permission to hold restricted religious services and funerals only, not opening to visitors.
Undergoing refurbishment	Layout of the attraction does not allow for social distancing
No booking system available	Essential maintenance work was delayed due to COVID-19
With localised restrictions consumers think Glasgow in closed	No cruise ships
Use of the UK Government furlough scheme for as long as possible	All other local attractions remain closed
Staffing resources a major issue	Undergoing refurbishment

2.2.4 Seasonal

All respondents were asked if they deemed their attraction as seasonal¹. Just over a third of respondents identified their attraction as this. Figure 2.6 further shows that just over half of the seasonal attractions did not re-open.

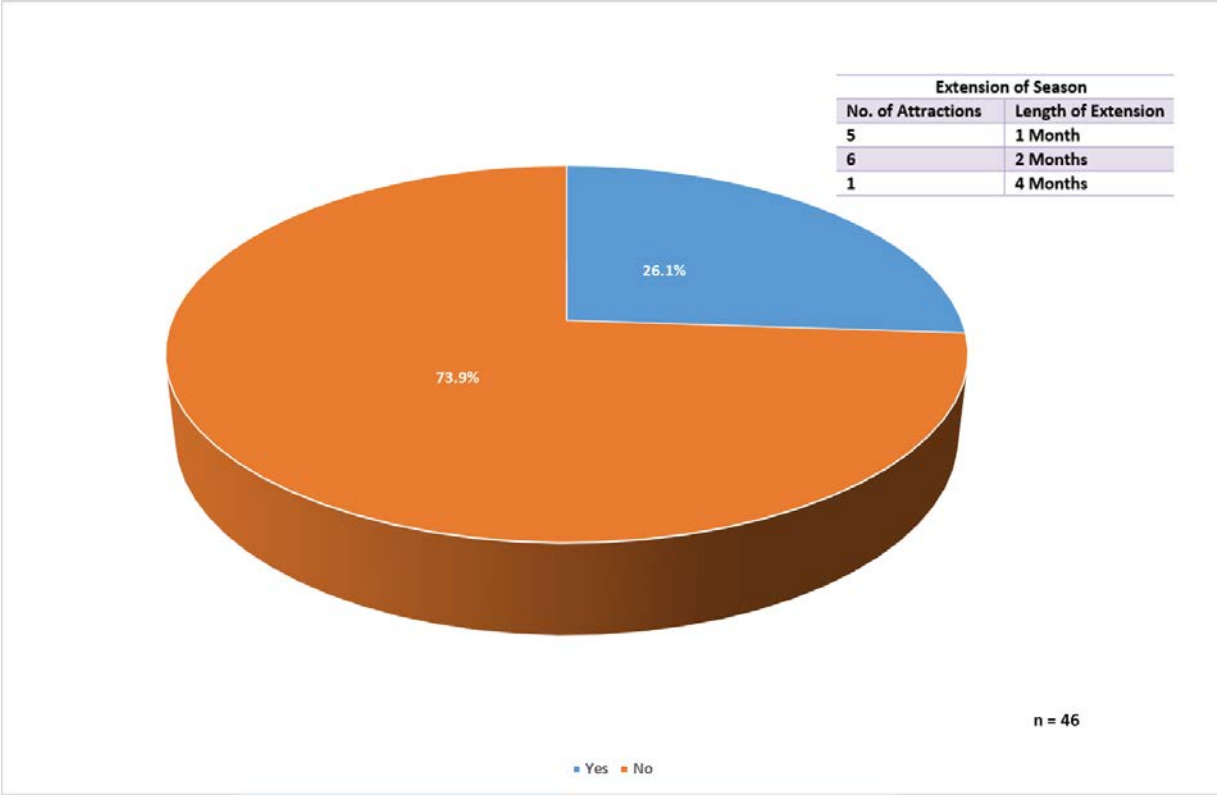
Figure 2.6 Seasonal Attractions



¹ An attraction is deemed seasonal when it is closed three or more months during the calendar year.

Respondents whose visitor attractions were seasonal and re-opened, were asked if they intended to extended their attractions season. Of the 46 respondents just over a quarter stated they had extended their season, with the majority looking to extend between 1 and 2 months.

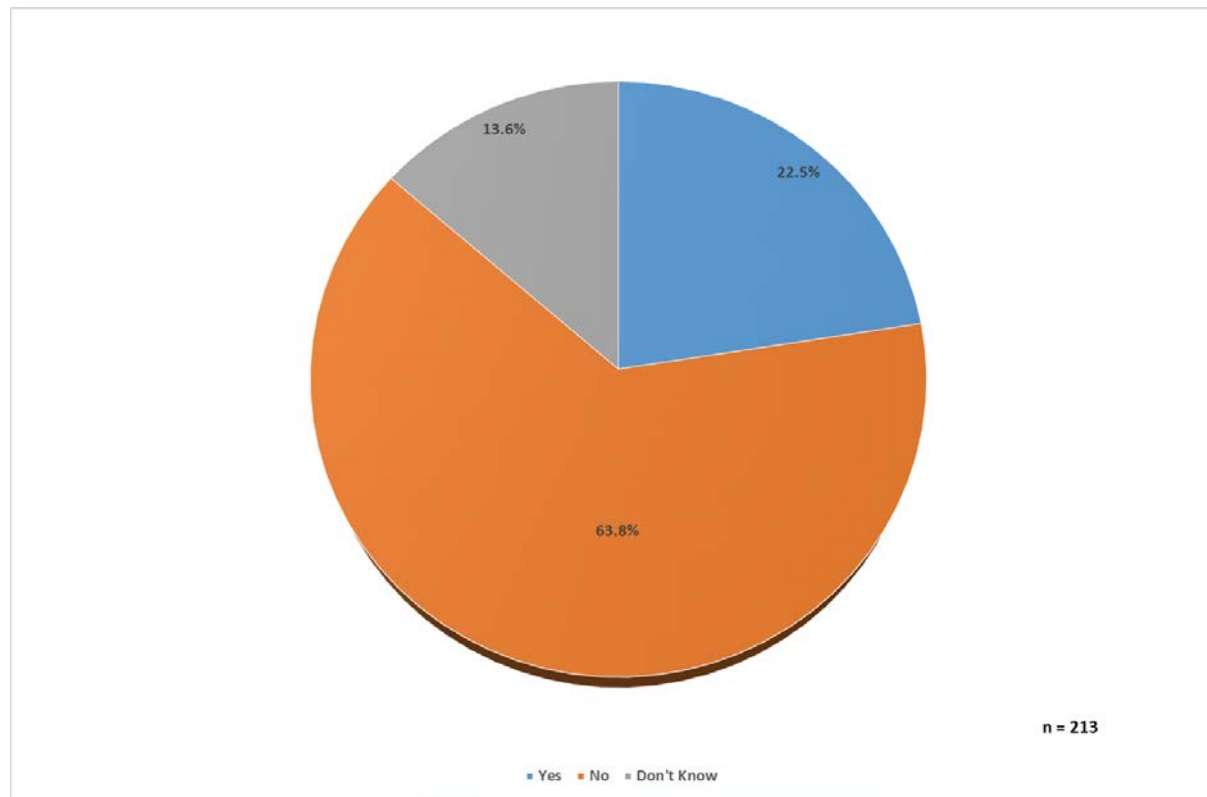
Figure 2.7 Extension of Season



2.2.5 Economically Sustainable

All Respondents were asked if they believe their attractions are currently operating at an economically sustainable level. Of the 213 who responded, just under two thirds of the attractions stated they did not feel that they were at a sustainable level.

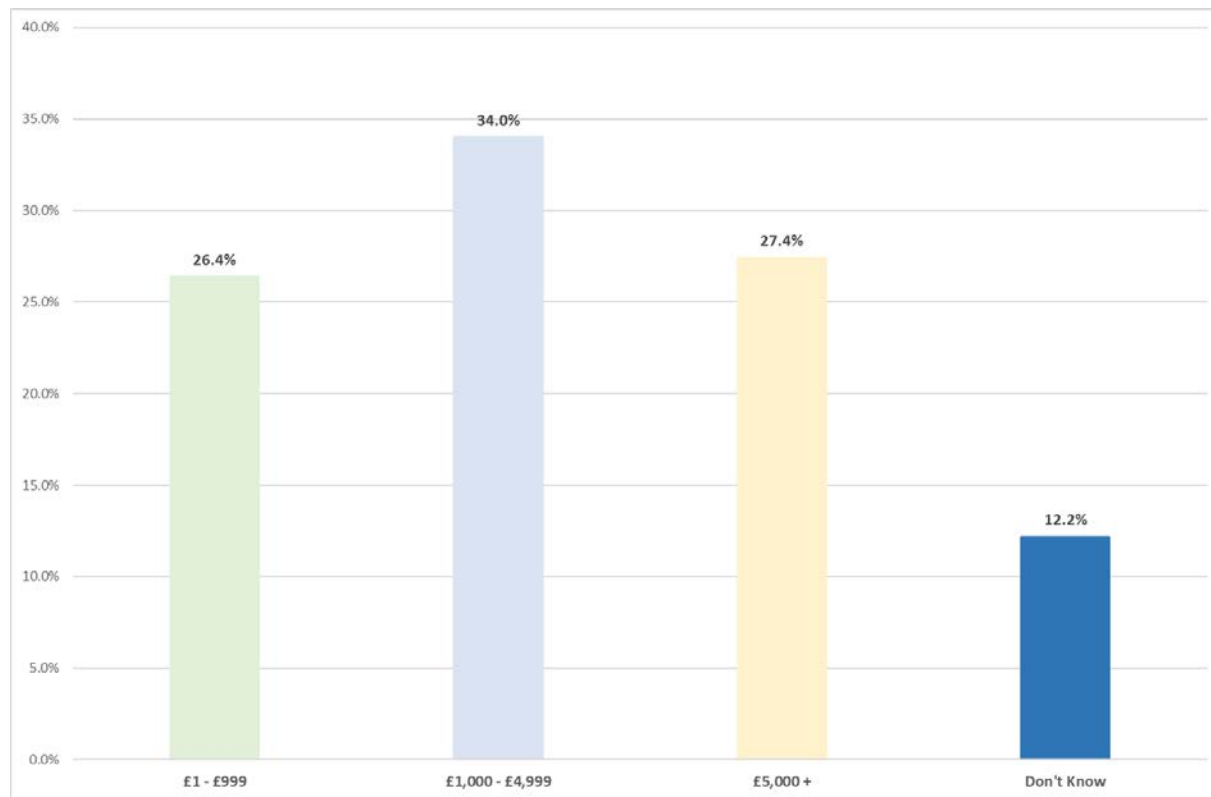
Figure 2.8 Economically Sustainable Level



2.2.6 Investment

Respondents were asked how much they have invested in making their business Covid-19 safe. Just over a third of respondents had spent between £1,000 and £4,999.

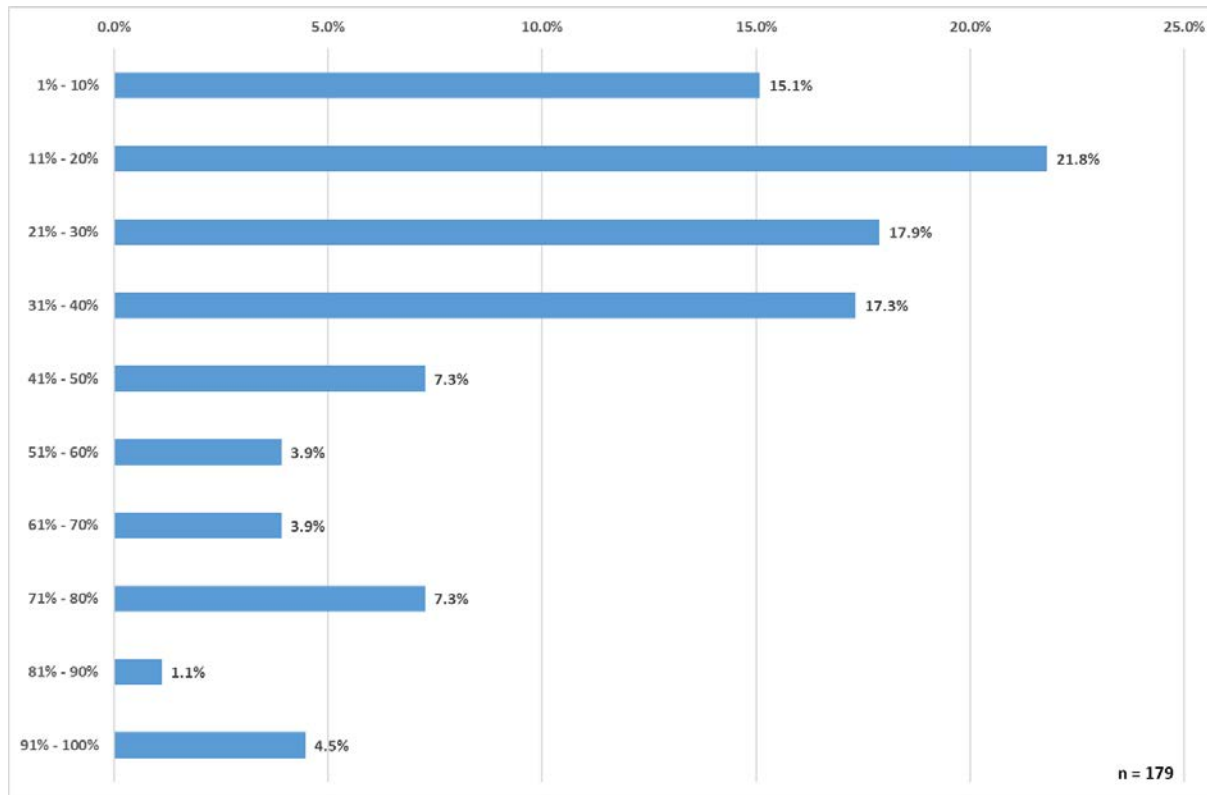
Figure 2.9 Investment to make Business Covid-19 Safe



2.2.7 Maximum Capacity

Respondents were asked about the current maximum capacity at which they can operate with the current physical distancing restrictions in place. Of the 179 respondents that answered this question, just under 80% were working at capacities 50% and below.

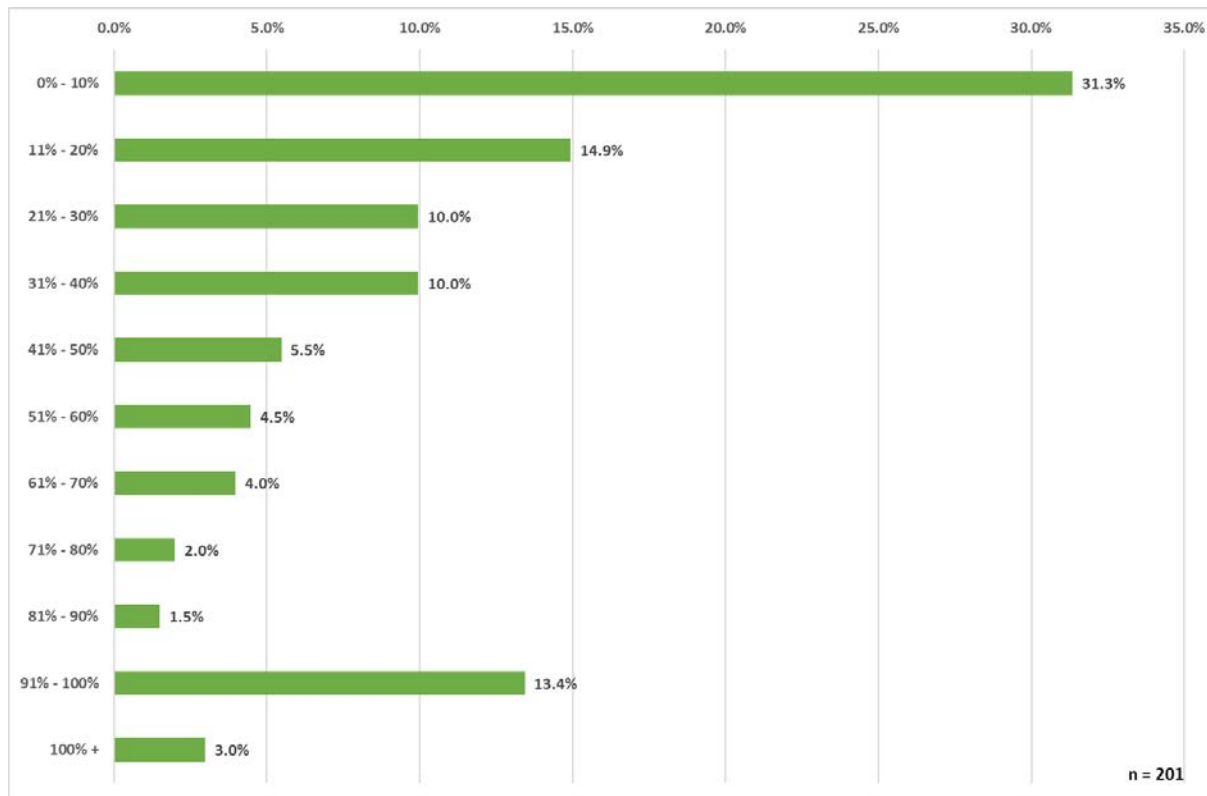
Figure 2.10 Current Maximum Capacity



2.2.8 Visitor Numbers

Of the 201 respondents just under a third had welcomed up to 10% of the visitors when comparing their numbers to the same period in 2019. 13% of respondents stated that visitor numbers in 2020 were between 91% and 100% compared to 2019 with 3% of attractions seeing an increase in overall visitor numbers.

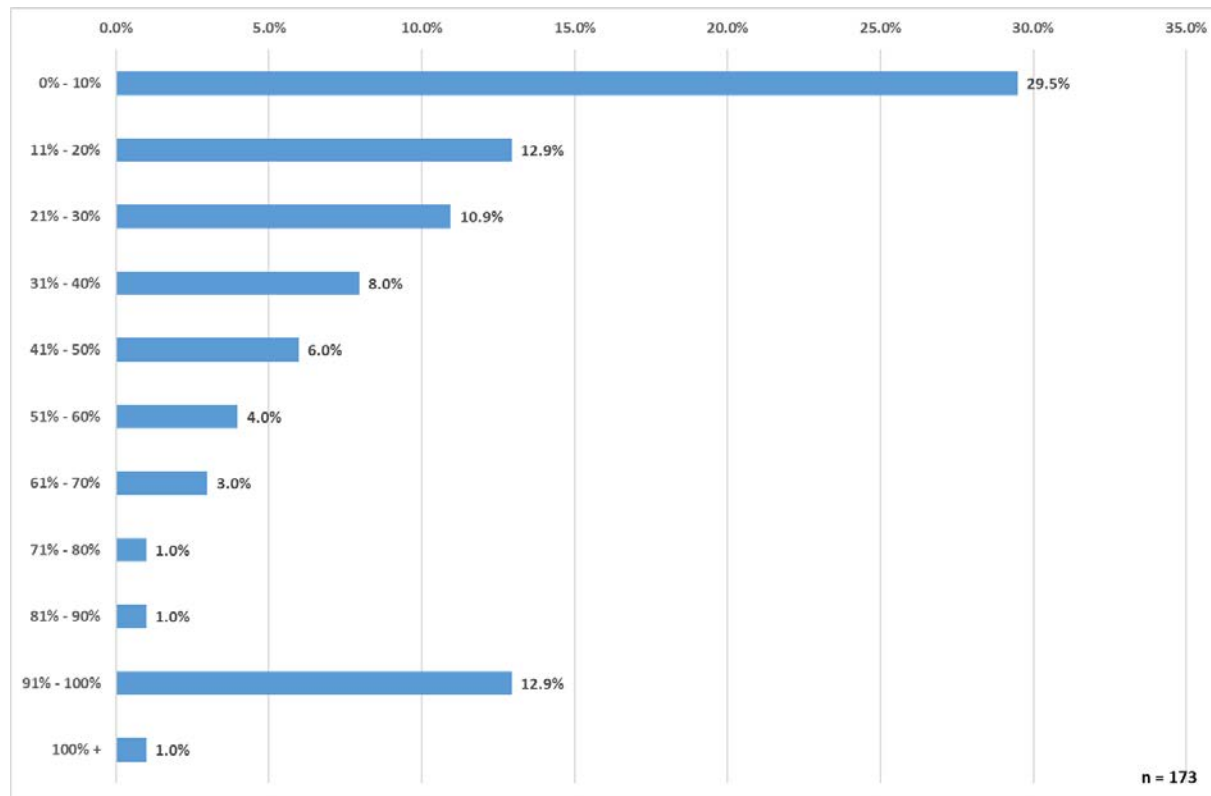
Figure 2.11 Visitor Numbers Compared to 2019



2.2.9 Comparative Total Turnover

Respondents were asked about their comparative total turnover to date compared to year 2019. Results indicate that over two thirds had seen a decline in turnover of 50% or more when compared to 2019. Only 1% of respondents had seen an increase of comparative total turnover.

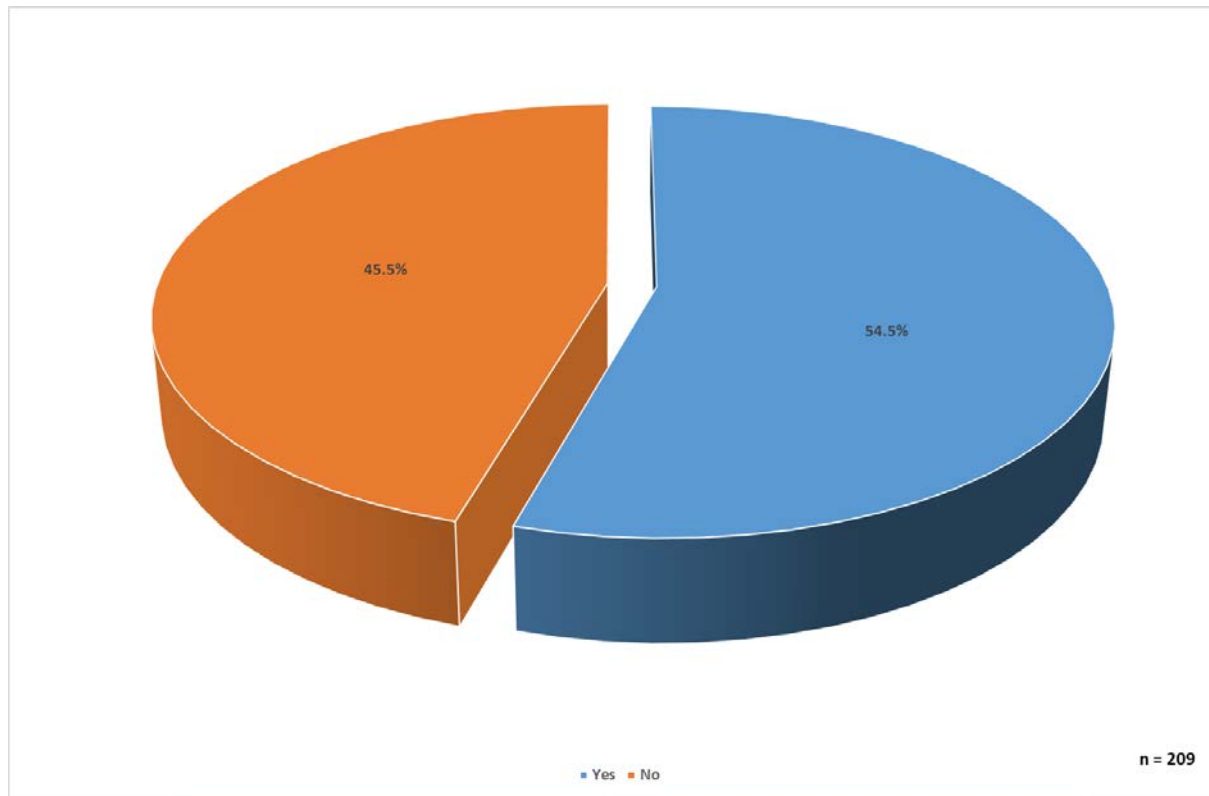
Figure 2.12 Total Turnover Compared to 2019



2.2.10 On-line Booking System

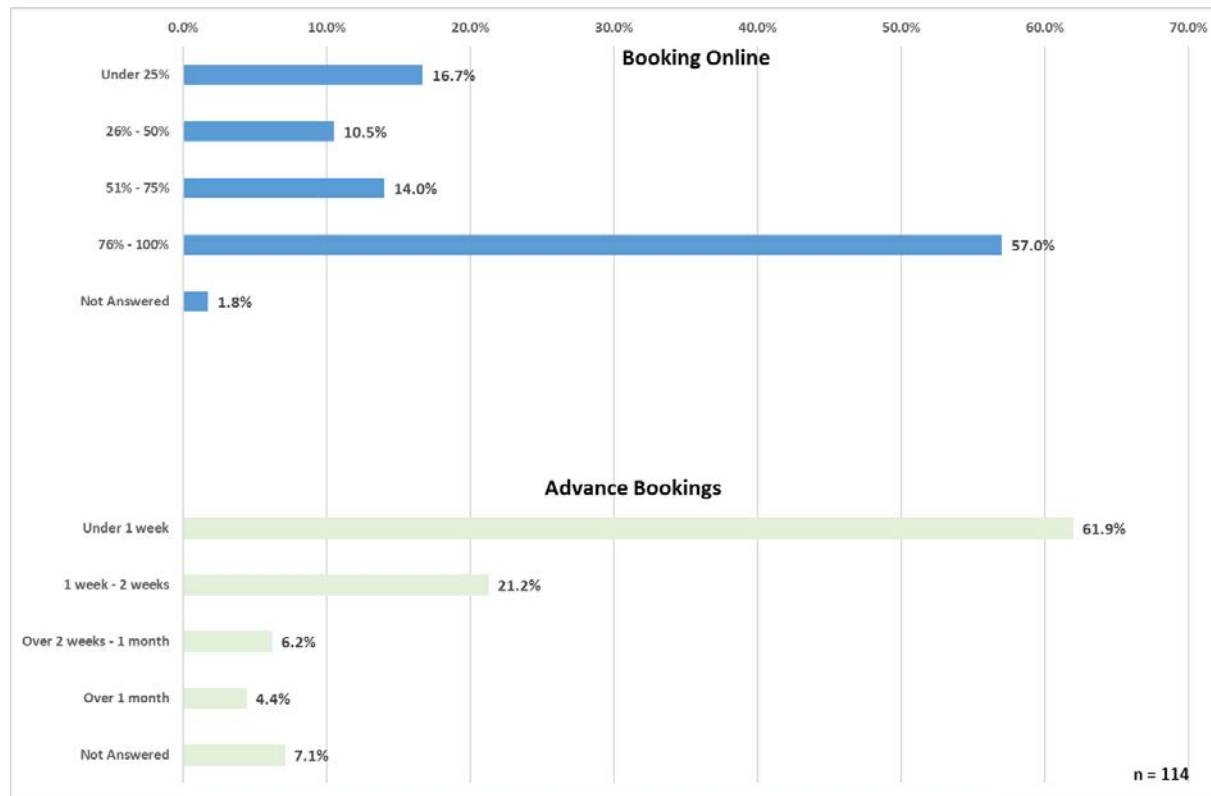
Respondents were asked if they would use an on-line booking system when they open. Over a half of the attractions (114) stated that they are using the system, whilst the remainder of respondents (95) stated that they are not using an on-line booking system.

Figure 2.13 Online Booking System



Of the 114 respondents using the on-line booking system, over half stated that between 75% and 100% visitors were using the on-line facility. The same percentage of respondents stated that those booking on-line were booking less than a week prior to the visit. It could be surmised that uncertainty owing to the rapidly changing picture with regards to Covid-19 Guidelines, often announced with only a week's notice, plays a significant role in the short lead time for bookings.

Figure 2.14 Booking Online & Advance Bookings



It should be noted, in their sectoral guidance for the tourism & hospitality sector, the Scottish Government have recommended that businesses look at introducing measures to manage capacities at their sites. One of the most effective ways to do this is to introduce an online booking service. Of the total respondents who stated that they did not have an on-line booking system, over a third did not have the technical expertise or the monies to implement it, whilst over 40% of respondents do not see the need for this type of system.

Table 2.2 Reasoning for not having an Online Booking System

Reason	Responses	%
Do not have time to implement	10	10.5
Do not have the technical expertise	15	15.8
Do not have the money to implement	18	18.9
Do not see the need to be online bookable	40	42.1
Do not want to use a 3rd party provider	8	8.4
Other	38	40.0
Not Answered	2	2.1

Note: Respondents could select more than one answer, hence total % > 100%.

Further advice from VisitScotland regarding this topic is available at this link - <https://www.visitscotland.org/supporting-your-business/advice/coronavirus/digital-guidance/digital-checklist>

Table 2.3 below shows the key comments submitted as Other reason(s) for not having an Online Booking System.

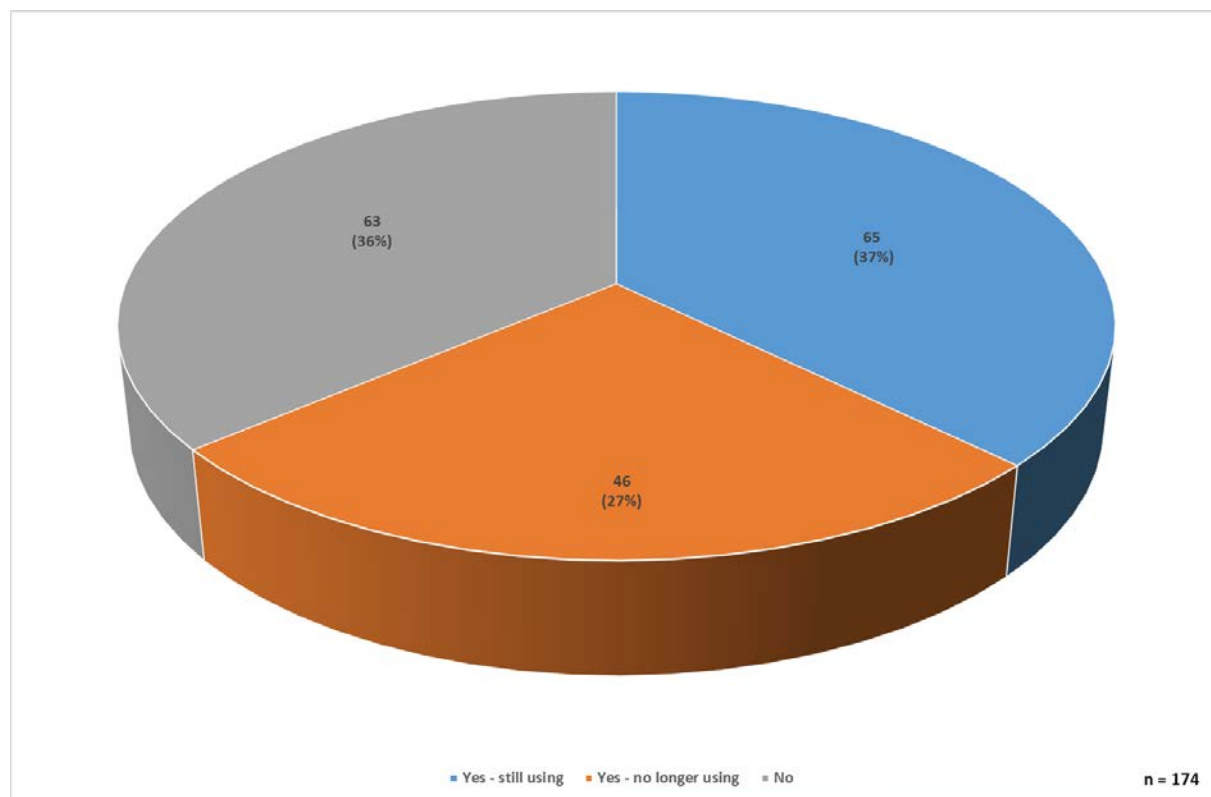
Table 2.3 'Other' Reason(s) for not having an Online Booking System.

Reason	Reason
Lack of viable internet makes it almost impossible.	Very small museum with random visitors of small numbered. Online would not work for us.
Regulations in place mean that the building needs to be closed for 72hrs after a service before being cleaned. This means the only possible time to open would be a Wednesday afternoon and evening and would involve further cleaning on a Saturday.	Currently prefer personal interaction with the customer, however I expect an online booking system will be introduced in the medium term.
Currently prefer personal interaction with the customer, however I expect an online booking system will be introduced in the medium term.	We are using phone/email bookings. Also, the majority of visitors are walk-ups.
Never been considered	Attraction does not operate through booking.
We simply have not yet implemented an online booking system.	Free entry, online booking not required.
Don't have funding or allowance from IT security point of view.	Volunteer group that endeavour's to raise funds and help to maintain garden basic website for info.
Bulk of our visitors are local.	Low key, family operated attraction with no employees.

2.2.11 Coronavirus Job Retention Scheme (CJRS)

Some 63.8% of respondents confirmed that they are or have used CJRS, while the remaining respondents indicated that they are not using the scheme. It should be noted that CJRS currently ceases at the end of November 2020 to be replaced by the Job Support Scheme.

Figure 2.15 Coronavirus Job Retention Scheme



2.2.12 Coronavirus Funding Support

Just over a third (38.1%) of respondents benefited from Government led coronavirus funding, with only 17.9% benefiting from other funding support.

As shown in Figure 2.17, of the 75 visitor attractions that received Government led funding over two thirds found it Essential/Very beneficial in sustaining their business.

This increased to 80% for those businesses that received other funding. Of those visitor attractions that did not receive any type of funding, approximately 60% were not eligible (Figure 2.18).

Figure 2.16 Coronavirus Funding

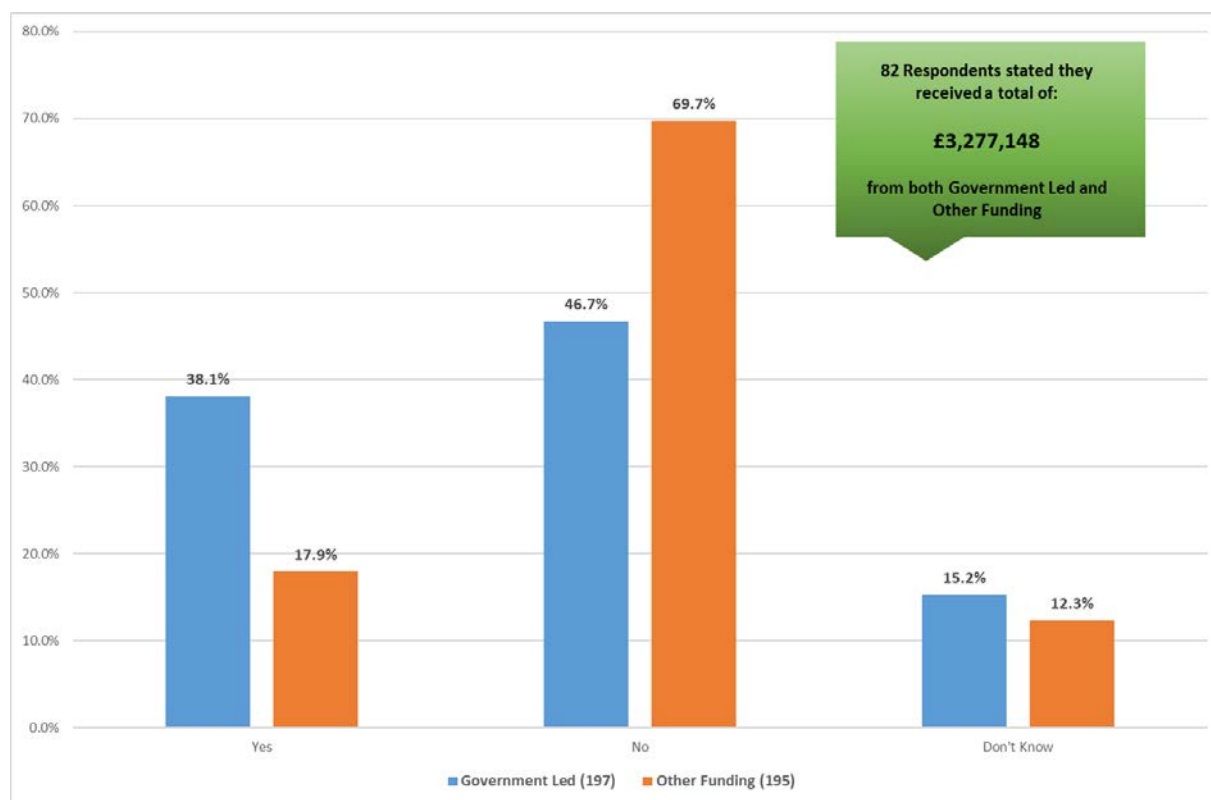


Figure 2.17 Coronavirus Funding – Support Levels

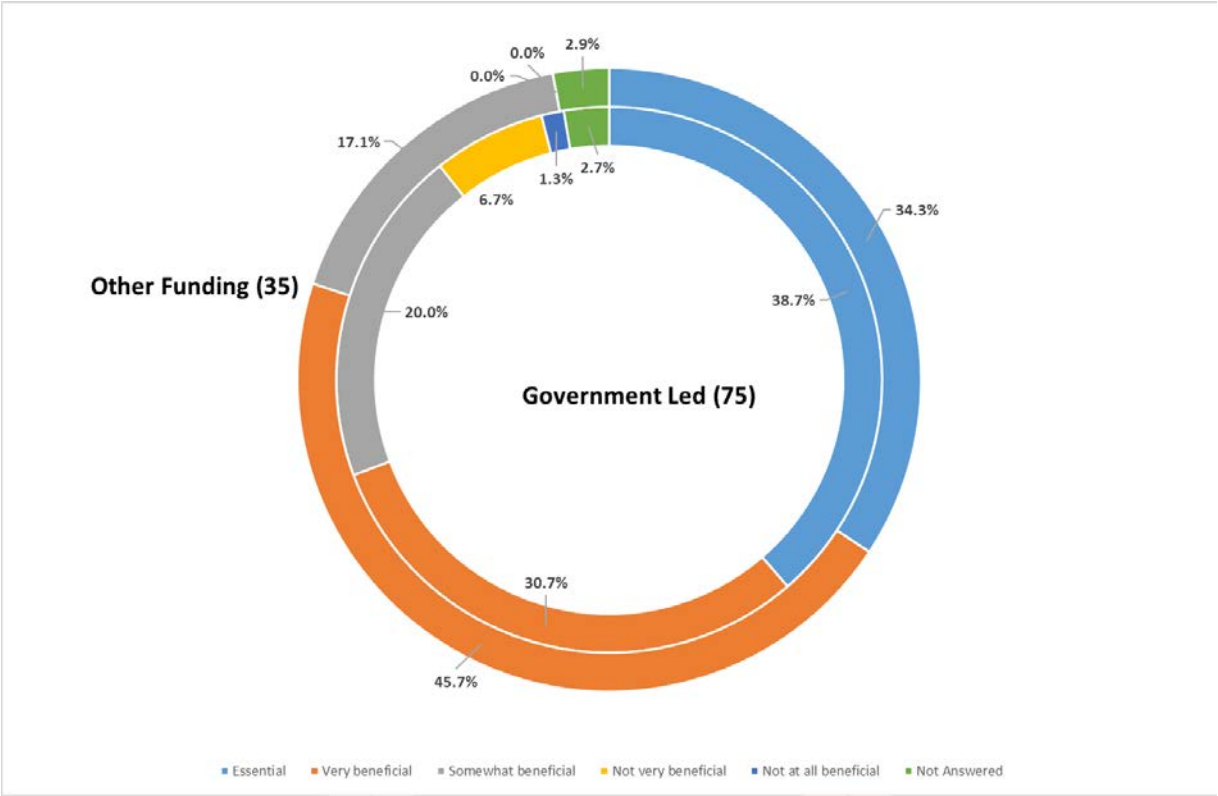
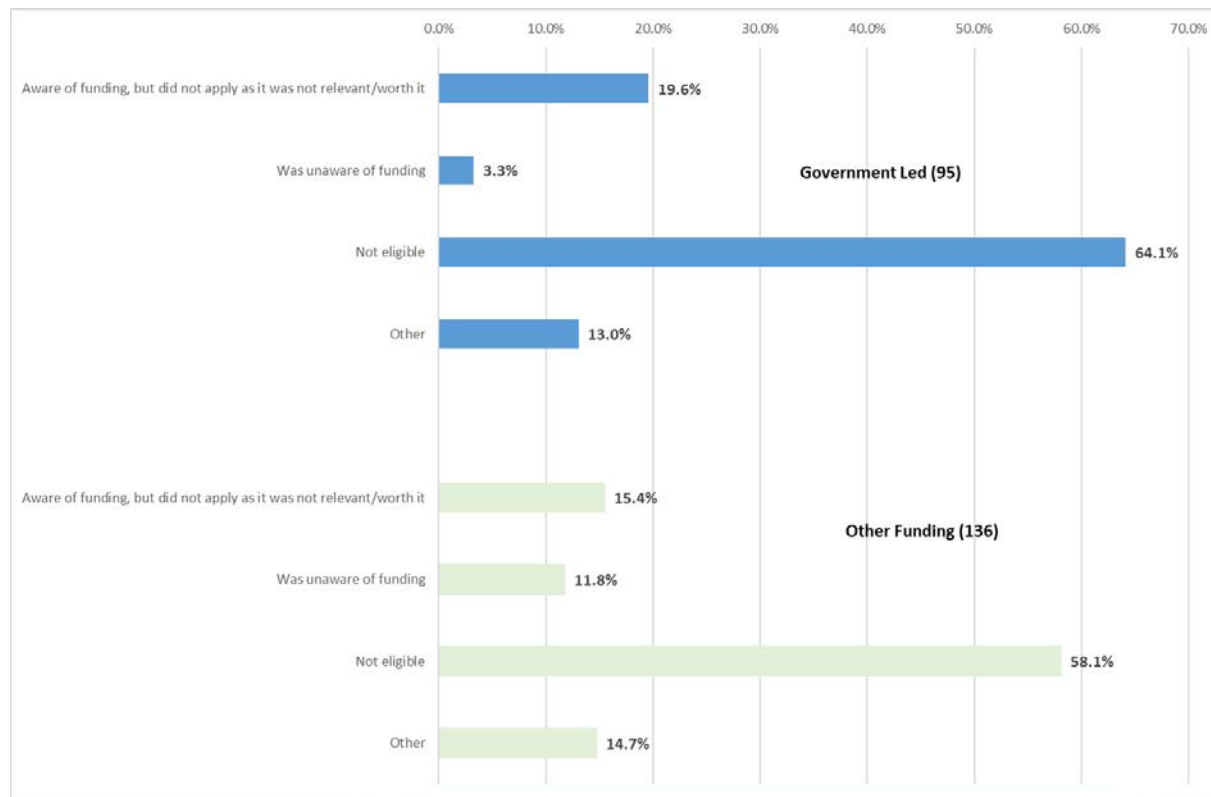


Figure 2.18 Coronavirus Funding – Reason(s) for not Benefitting for Scheme

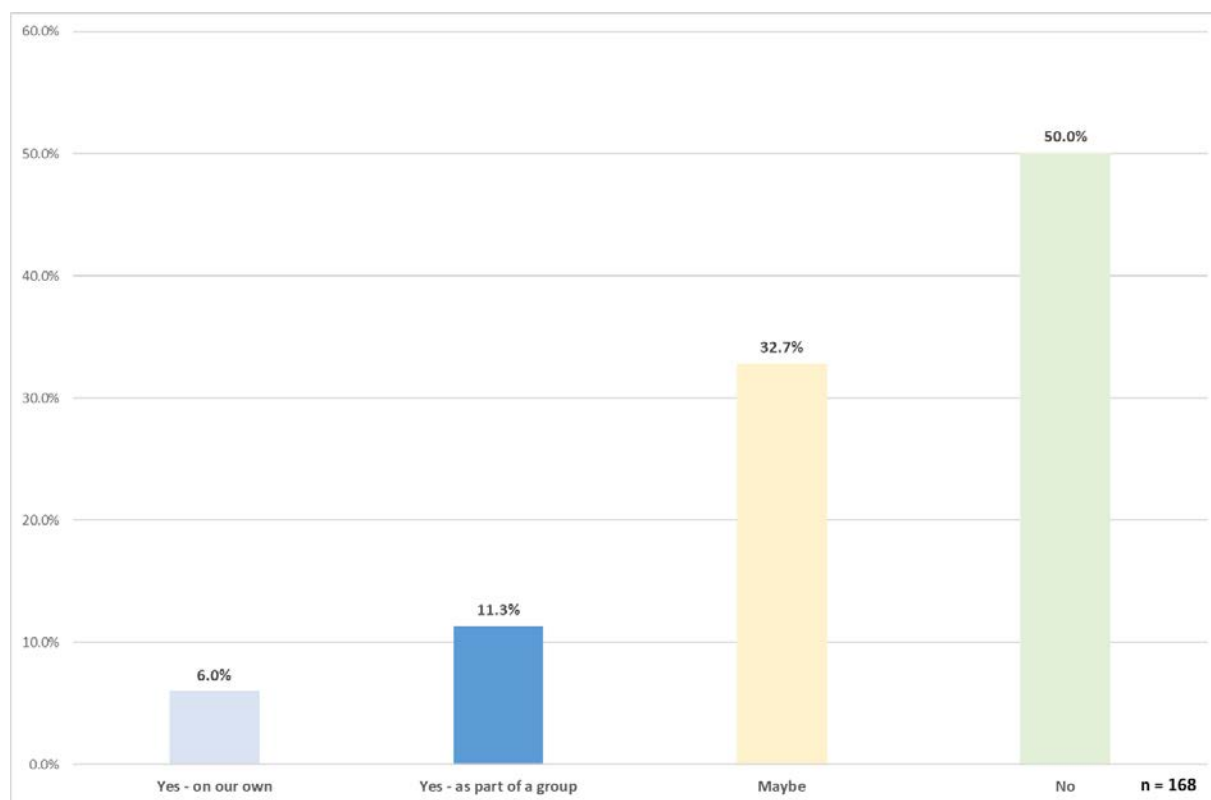


2.2.13 Kickstart Scheme

The respondents were asked if they would consider applying (or already have applied) for the UK Government led Kickstart Scheme. This scheme is aims to provide funding to employers to create job placements for 16 to 24 year olds on Universal Credit who are at risk of long term unemployment. Of the 168 respondents 17% indicated that they would apply with a further third unsure if they would apply. Further information about the scheme is available via the following link:

<https://www.gov.uk/government/collections/kickstart-scheme>.

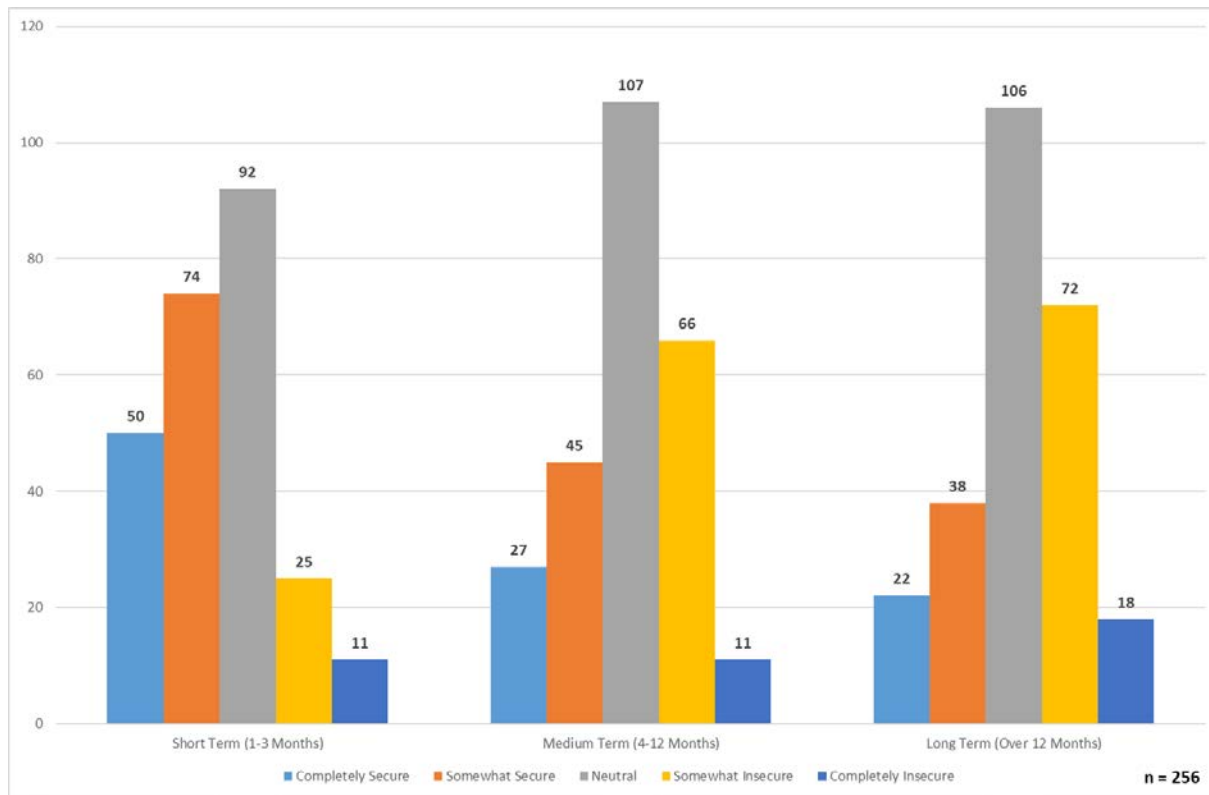
Figure 2.19 Kickstart Scheme



2.2.14 Security of Business

Of the 256 respondents, just under 50% believe their business is secure in the short term. However, this number significantly declines to under 25% when looking at the long term security of the business.

Figure 2.20 Security of Business



2.2.15 Staffing Levels

Some 226 respondents answered this question regarding overall manning levels prior to lockdown and the revised staffing levels when re-opening. As shown in Table 2.2 there is a significant impact on all types of staffing levels. Survey results further highlighted that many Unpaid volunteers were in the 'Shielding' or 'high risk' groups and therefore it was not viable to utilise this group of staff.

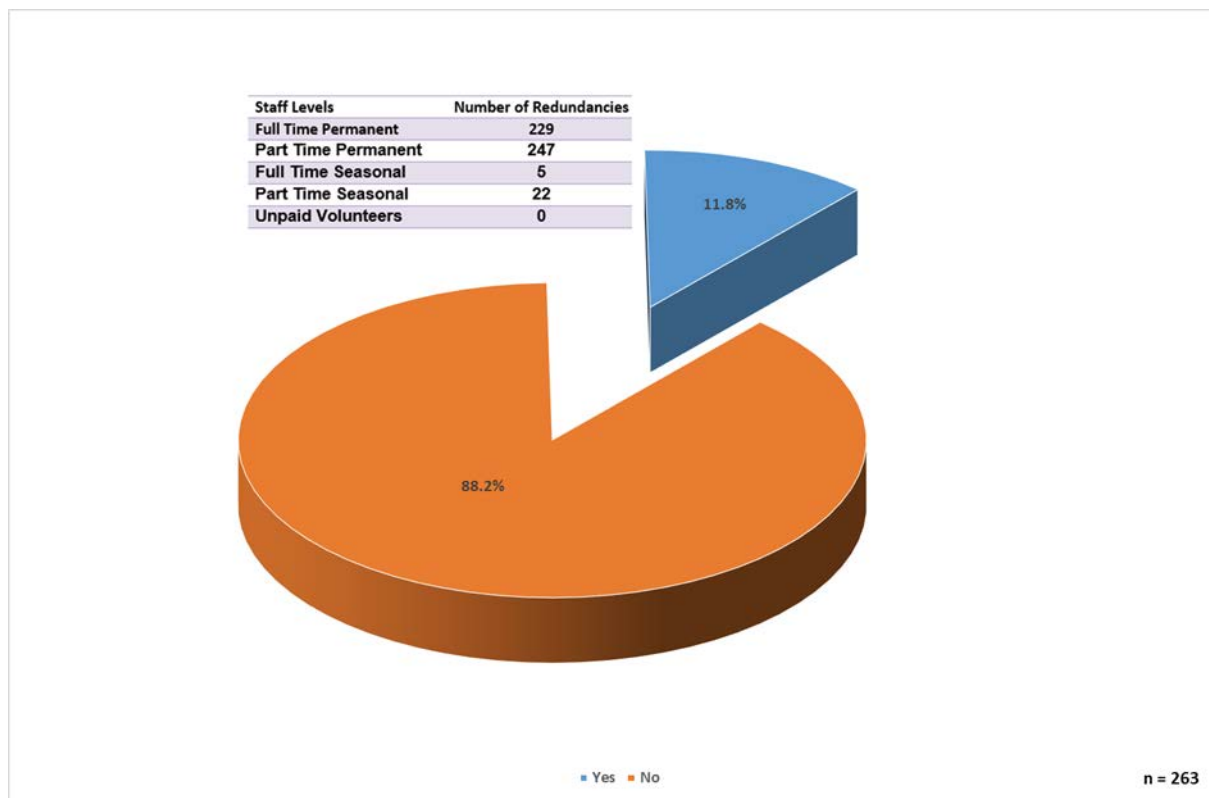
Table 2.4 Staffing Levels Prior to Lockdown and after Re-opening

Staff Levels	Prior to Lockdown	After Re-Opening	+/- Staffing Levels	% Diff
Full Time Permanent	2150	1831	-319	-15%
Part Time Permanent	961	812	-149	-16%
Full Time Seasonal	590	346	-244	-41%
Part Time Seasonal	1194	553	-641	-54%
Unpaid Volunteers	5906	4349	-1557	-26%

2.2.16 Redundancies

Of the 263 respondents who answered this question, 31 business (11.8%) had made redundancies. This totalled 503 staff, a breakdown is shown in Figure 2.21.

Figure 2.21 Redundancies



2.2.17 Future Redundancies

The vast majority of respondents do not envisage making any future redundancies, as shown in Figure 2.22. A further breakdown by staffing levels can be seen in Table 2.5, containing the number of redundancies by type for those stated that believe that they will be required to make redundancies.

Figure 2.22 Future Redundancies

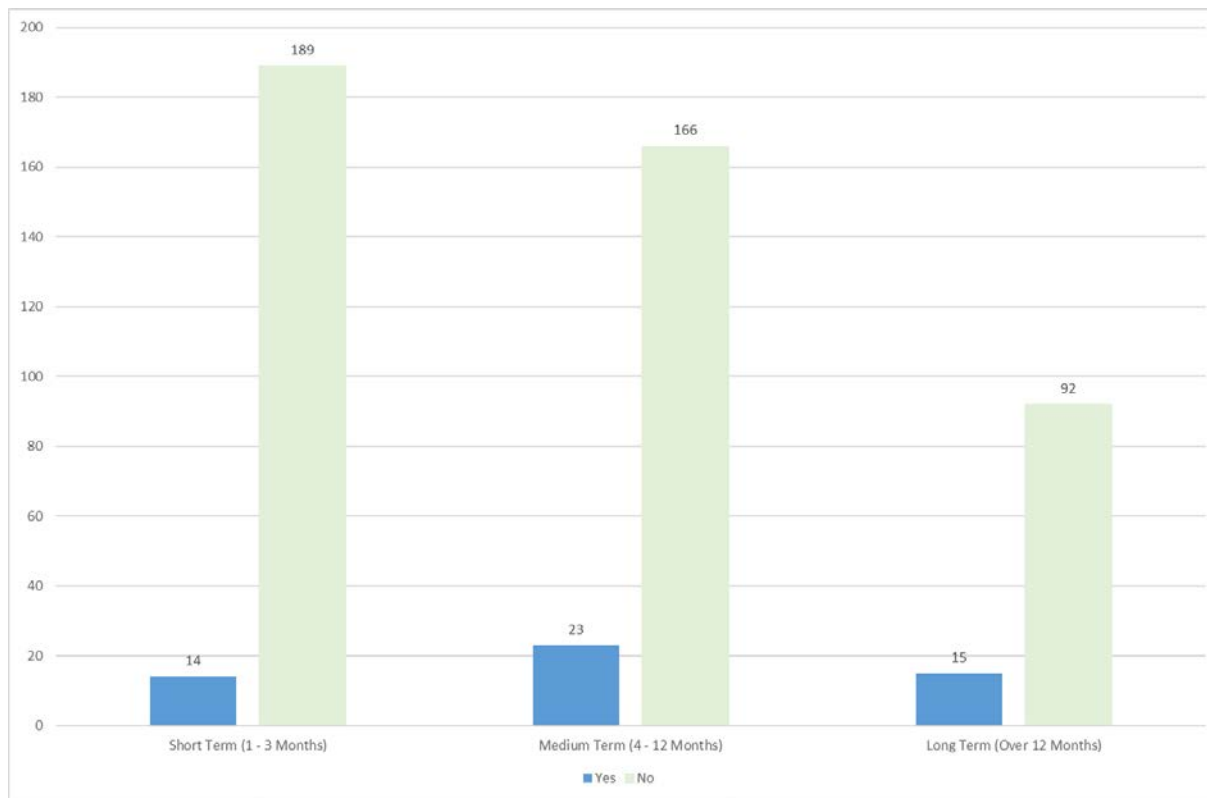


Table 2.5 Staffing Levels - Future Redundancies

Staff Levels	Short Term (1 - 3 Months)	Medium Term (4 - 12 Months)	Long Term (Over 12 Months)
Full Time Permanent	27	17	8
Part Time Permanent	17	20	16
Full Time Seasonal	3	0	10
Part Time Seasonal	31	13	11
Unpaid Volunteers	0	10	10

2.2.18 Key Ask of the Scottish Government and/or the UK Government

All Respondents were asked the following question ‘What is your ONE key ask of the Scottish Government and/or the UK Government at this stage, either for your organisation specifically or on behalf of the sector as a whole?’ 216 responded with their comments shown in Table 2.6.

Table 2.6 Key Asks

Reason	Reason
To provide funding to retain jobs and a scheme aimed at providing jobs / traineeships for young people in the sector.	Get together and work out a strategy that benefits the UK rather than each of them showboating on TV about how good they are!
Clarity of information, especially when changes occur in such a rapid way.	Need to encourage consumer confidence - you can still safely visit attractions and support the visitor economy.
Continued financial support during 2021 to aid recovery back to normal business levels.	To recognise the importance of the environmental charity sector which provides a safe place for people to connect with nature at such an important time for wellbeing.
More support from Police Scotland and local authorities when dealing with the antisocial behaviour issues arising from massively increased use of the Scottish countryside post-lockdown.	Think about long-term implications not just short-term funding gaps.
Testing at airports to see our European and International visitors return safely and with confidence.	Provide each Visitor Attraction with Core Equipment and Skills to enable each venue to produce a short promo film for use in promoting the venue to a fresh market via a variety of innovative events
Keep fighting the virus so we can open again. Until then, we are fine. Building is secure, bills can be met, volunteers are protected.	General support for the sector.

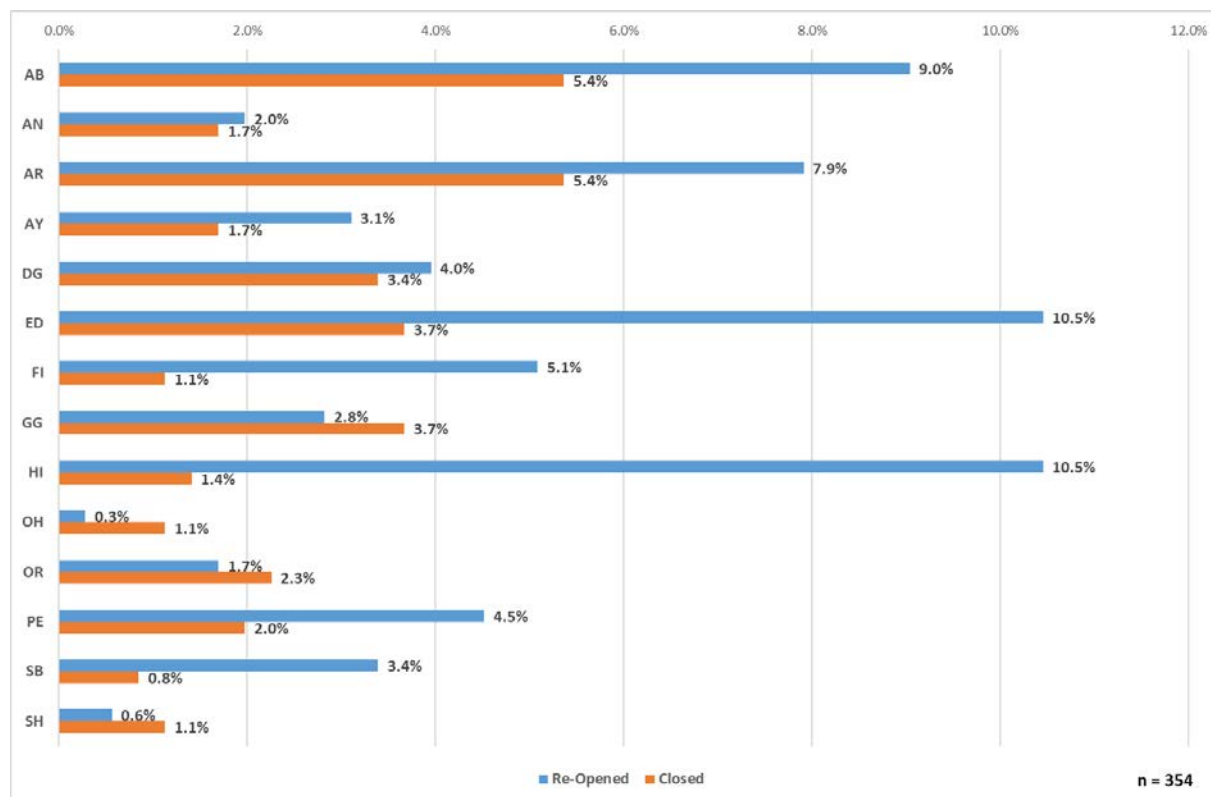
We are just looking forward to opening again, hopefully at Easter as usual.	
Recognise voluntary sector.	Make Covid-19 decisions clear, sensible, and fair.
To provide funds for building insurance.	Funding schemes should not punish museums (particularly charities) which have, through strict financial control, accumulated financial reserves to cushion the charity against rent rises and other running cost escalation. It is the duty of a charity to maintain a strong financial base to protect it. That is correct financial forward planning.
To make it possible when applying for grant funding to do so based on the turnover of the visitor centre itself as oppose to the entire company. Us, like many other attractions are attached to a large organisation but make up only a fraction of the total turnover. We need to be able to apply as an individual entity. Also, I went to the expense of paying our accountants to prepare a set of accounts solely for the visitor centre and a week before the deadline to apply, the website crashed and no-one was able to assist in my grant application getting processed More support. The tourism industry has been hard hit by this pandemic. Things like introducing a 1-meter social distancing rule in tourist attractions would make a huge difference specially to places like us where space can be limited in certain parts. It would also be good to get a bit more warning about certain new measures being introduced. For example, announcing the day before attractions were allowed to open that we had to collect customer details for test and protect and announcing on the 7th of August that face masks were to become mandatory from the 8th. Making these announcements last minute is incredibly unhelpful to places with a small team like us as it takes a lot to put measures into place.	

2.2.19 Location of Attractions by VisitScotland Region

Of the 354 respondents, 231 (65.3%) attractions stated they would be re-opening either fully or partially whilst 123 (34.7%) attractions stated they would be remaining closed.

The VisitScotland Region of Aberdeen & Grampian (AB) submitted the highest number of responses (51). Edinburgh & Lothian and the Highlands of Scotland had the highest percentage (10.5%) of attractions that re-opened. The VisitScotland Regions of Aberdeen & Grampian (AB) and Argyll, Loch Lomond & Forth Valley had the highest percentage (5.4%) of attractions not opening again in 2020.

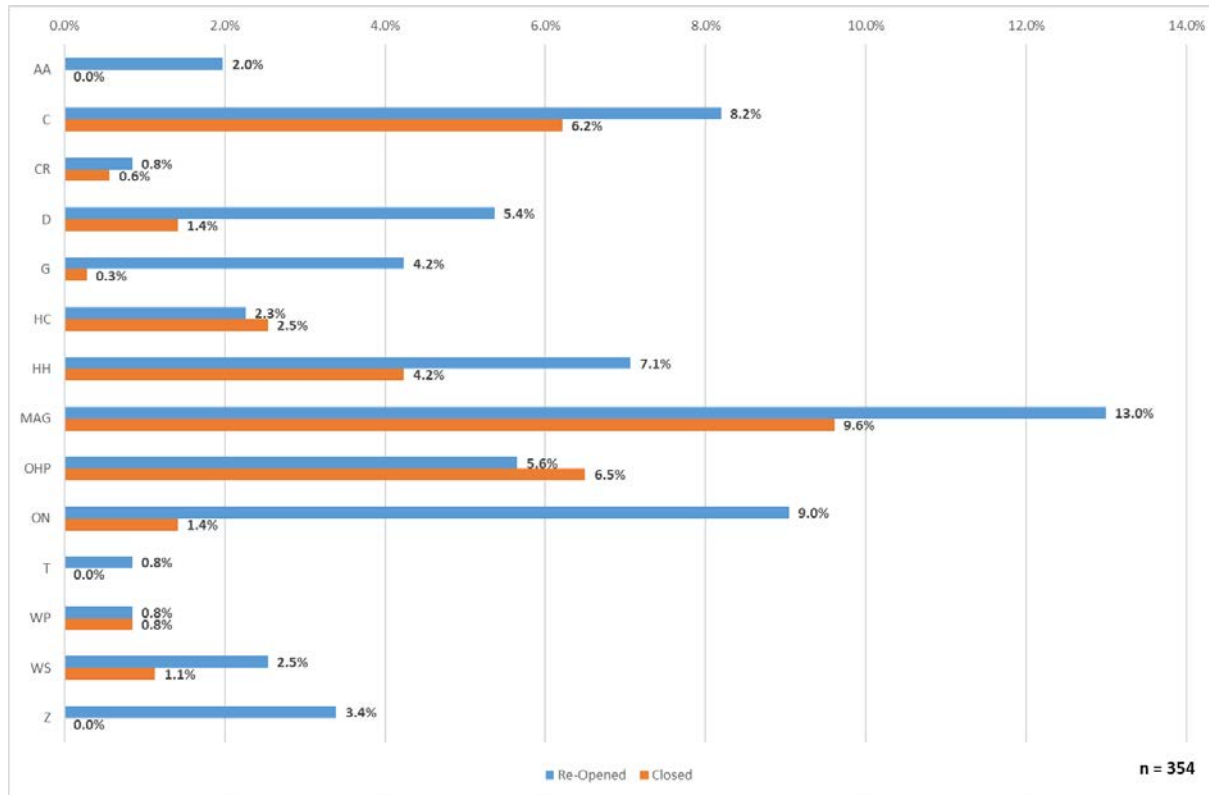
Figure 2.23 Location of Attractions by VisitScotland Region



2.2.20 Attraction Category

The Attraction Category of Museums/Art Galleries submitted the highest number of responses (80) and also had the highest percentage (13.0%) of attractions that re-opened, however it also had the highest percentage (9.6%) of attractions not opening again in 2020.

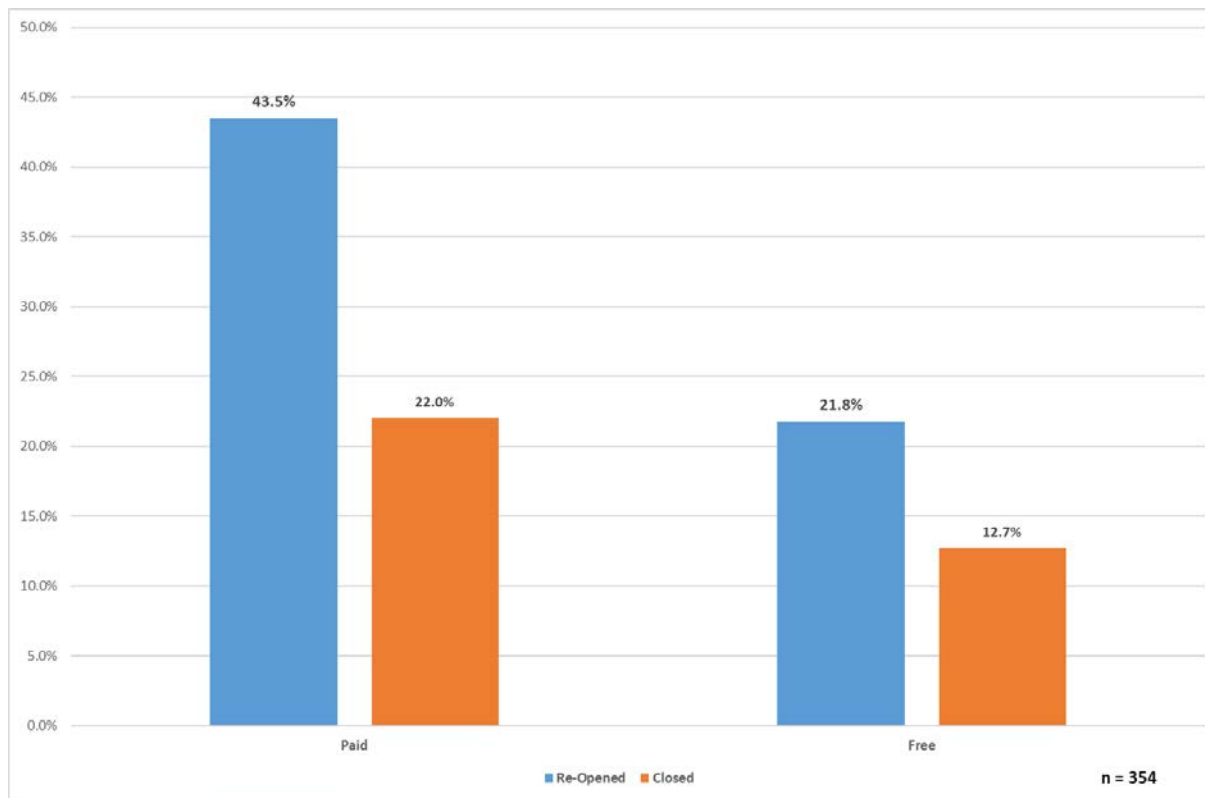
Figure 2.24 Attraction Category



2.2.21 Paid & Free Attractions

Of the 354 Respondents, 232 of these are a paid attraction, of this just 154 of paid attractions re-opening. Of the 122 Free attractions that responded 77 re-opened this year.

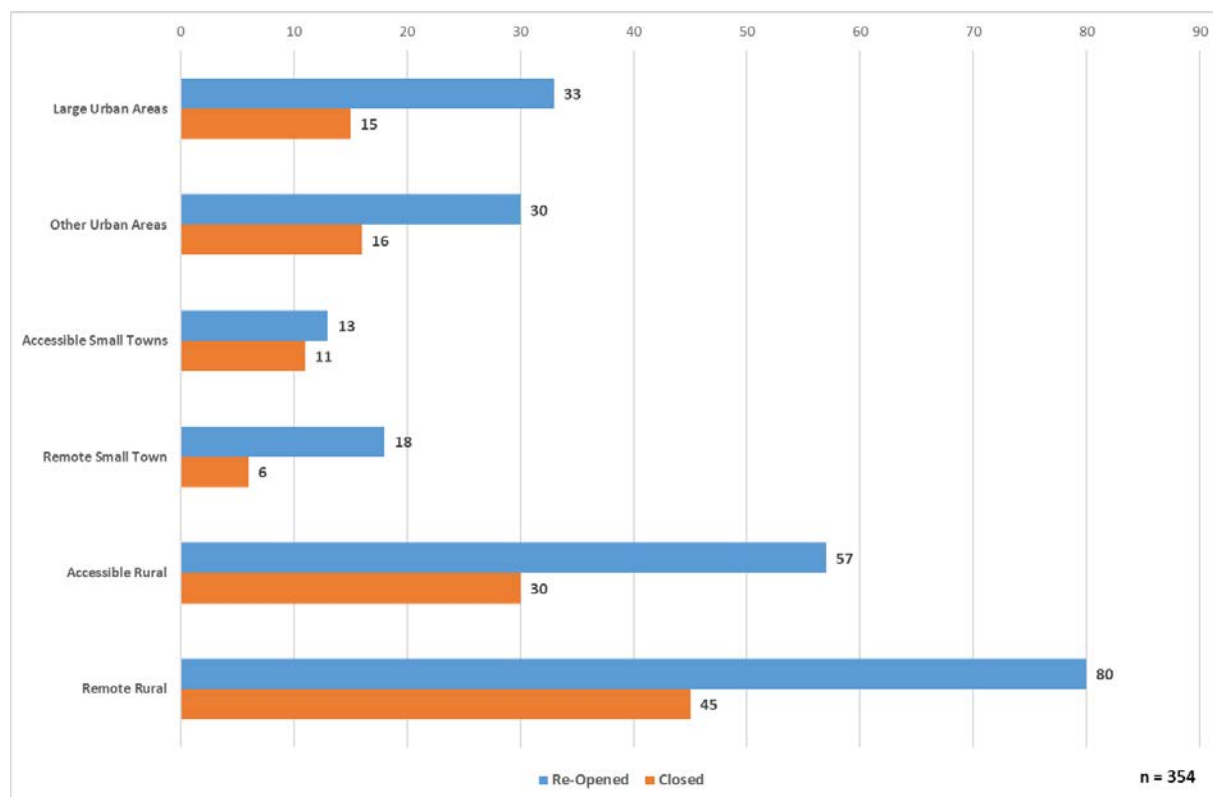
Figure 2.25 Paid & Free Attractions



2.2.22 Geographical Location of Attractions

Of the 254 Respondents, over a half are located in Accessible Rural (87) or Remote Rural (125) locations, with just over a quarter of all attractions located in Large or Other Urban Areas (48 and 46 respectively). Attractions in the Remote Rural Areas had the highest number of attractions (80) that re-opened again in 2020, however it also had the highest number (45) of attractions not opening again in 2020.

Figure 2.26 Location of Attractions

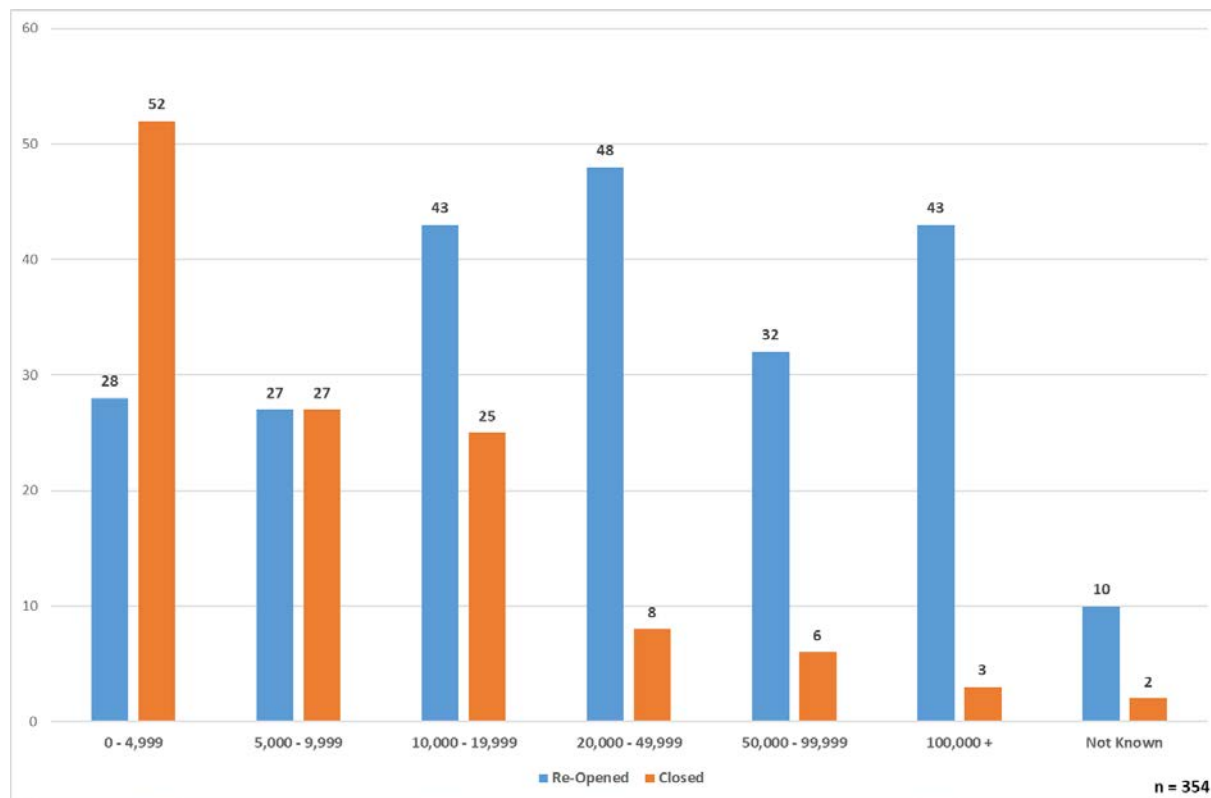


Scottish Government's 2013-2014 Urban Rural Classification

2.2.23 Volume of Visits

43 of the 46 Respondent attractions with over 100,000 visits yearly re-opened again in 2020. Of the 80 Respondents with up to 4,999 visits yearly 52 attractions would not be opening again in 2020. Clearly smaller attractions who have lost 50% or more of their season cannot afford to re-open, also as seen in Table 2.1 many volunteers are in the vulnerable age-group and also sourcing staff overall is problematic this late in season.

Figure 2.27 Volume of Visits



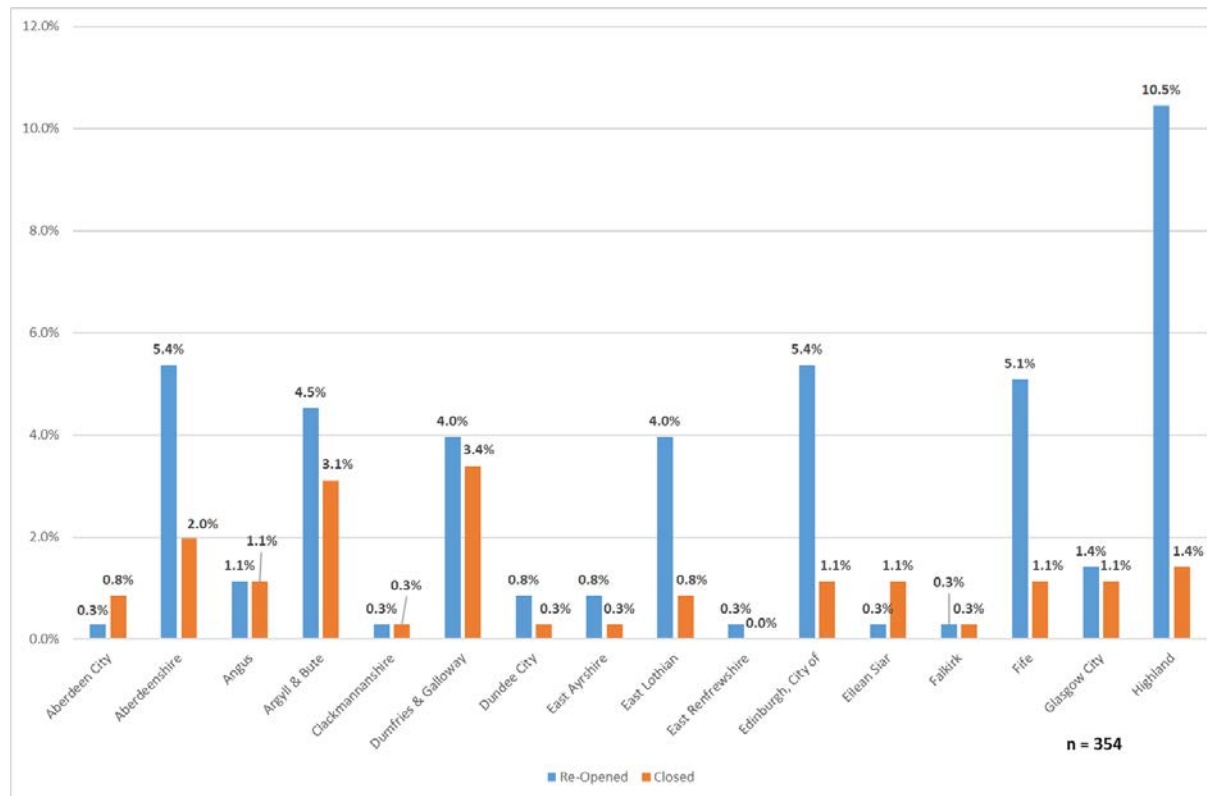
**Updated using the Moffat Centre Scottish Visitor Attraction Monitor 2019*

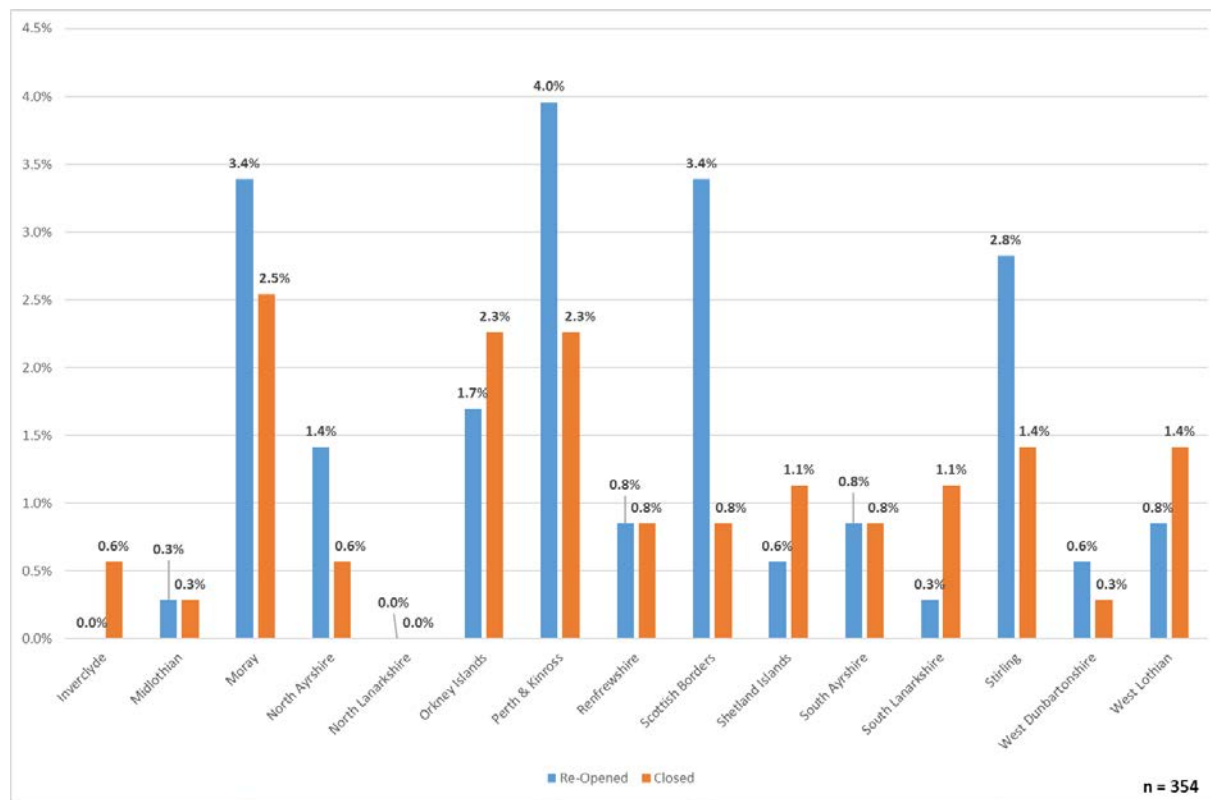
2.2.24 Location of Attractions by Local Authority Area

The Highland Local Authority submitted the highest number of responses (42) and also had the highest percentage (11.9%) of attractions that have re-opened again in 2020.

The Local Authority area of Dumfries & Galloway had the highest percentage (3.4%) of attractions not opening again in 2020. It should be noted that the Local Authority graph has been split into two for ease of reading.

Figure 2.28 Location of Attractions by Local Authority Area





2.2.25 List by Status of Scottish Visitor Attractions in 2020

This section contains listings of attractions according to whether they are reopening or remaining closed for the remainder of 2020. Attractions are arranged in alphabetical order. Please note that the following tables do not include attractions that requested to remain confidential.

Table 2.4 Scottish Visitor Attractions Re-Opened Post Lockdown in 2020 (in alphabetical order)

Owner	Attraction Name	Re-Opened Post Lockdown	Category	VS Region	Council	Free/Paid
HES	Aberdour Castle	Yes - Fully	C	FI	Fife	P
NTS	Alloa Tower	Yes - Partially	C	AB	Aberdeenshire	P
CT	Almond Valley Heritage Centre	Yes - Partially	Z	ED	West Lothian	P
HES	Arbroath Abbey	Yes - Partially	OHP	AN	Angus	P
NTS	Arduaine Garden	Yes - Partially	HH	HI	Highland	F
CT	Atholl Country Life Museum	Yes - Fully	MAG	PE	Perth & Kinross	P
P	Attadale Gardens	Yes - Partially	G	HI	Highland	P
NTS	Balmacara Estate & Lochalsh Woodland Garden	Yes - Fully	HH	AN	Angus	P
NTS	Balmerino Abbey	Yes - Fully	G	DG	Dumfries & Galloway	P
CT	Balranald Nature Reserve RSPB	Yes - Partially	Z	OH	Eilean Siar	F
NTS	Barry Mill	Yes - Partially	OHP	AN	Angus	P
NTS	Ben Lawers Visitor Centre	Yes - Fully	ON	HI	Highland	F
NTS	Ben Lomond	Yes - Fully	WP	SB	Scottish Borders	P
CT	Bennie Museum	Yes - Partially	MAG	ED	West Lothian	F
HES	Blackness Castle	Yes - Partially	C	AR	Falkirk	P
P	Braemar Castle	Yes - Partially	C	AB	Aberdeenshire	P
NTS	Branklyn Garden	Yes - Fully	WP	AN	Angus	P
NTS	Brodrick Castle & Country Park	Yes - Partially	C	FI	Fife	P
NTS	Brodie Castle	Yes - Partially	C	AB	Aberdeenshire	P
NTS	Broughton House & Garden	Yes - Partially	OHP	HI	Highland	P
NTS	Burg	Yes - Fully	ON	HI	Highland	F
P	Bute Museum	Yes - Partially	MAG	AR	Argyll & Bute	P
HES	Caerlaverock Castle	Yes - Partially	C	DG	Dumfries & Galloway	P
G	Caledonian Canal Visitor Centre	Yes - Partially	ON	HI	Highland	F
NTS	Canna	Yes - Partially	HC	AY	South Ayrshire	P

NTS	Castle Fraser	Yes - Partially	ON	HI	Highland	F
P	Cluny Activities	Yes - Partially	AA	FI	Fife	P
NTS	Corrieshalloch Gorge	Yes - Fully	WP	ED	East Lothian	P
P	Craig Highland Farm	Yes - Fully	Z	HI	Highland	F
NTS	Craigievar Castle	Yes - Partially	C	AB	Aberdeenshire	P
HES	Craigmillar Castle	Yes - Fully	C	ED	Edinburgh, City of	P
LA	Craigtoun Country Park	Yes - Partially	ON	FI	Fife	F
NTS	Crarae Garden	Yes - Partially	HC	AR	Stirling	P
NTS	Crathes Castle	Yes - Fully	C	AB	Aberdeenshire	P
P	Cream o' Galloway	Yes - Partially	AA	DG	Dumfries & Galloway	P
CT	Cromarty Courthouse Museum	Yes - Partially	MAG	HI	Highland	F
NTS	Culloden Visitor Centre	Yes - Fully	OHP	PE	Perth & Kinross	F
NTS	Culross Palace	Yes - Partially	HH	GG	Glasgow City	P
NTS	Culzean Castle and Country Park	Yes - Partially	OHP	AR	Clackmannanshire	P
P	Dalkeith Country Park	Yes - Partially	ON	ED	Midlothian	F
LA	Dean Castle Country Park	Yes - Fully	ON	AY	East Ayrshire	F
P	Delgatie Castle	Yes - Fully	C	AB	Aberdeenshire	P
PLC	Dewar's Aberfeldy Distillery	Yes - Partially	D	PE	Perth & Kinross	P
HES	Dirleton Castle	Yes - Fully	C	ED	East Lothian	P
HES	Doune Castle	Yes - Partially	C	AR	Stirling	P
NTS	Drum Castle	Yes - Partially	HC	HI	Highland	P
HES	Dryburgh Abbey	Yes - Fully	OHP	SB	Scottish Borders	P
HES	Dumbarton Castle	Yes - Partially	C	AR	West Dunbartonshire	P
LA	Dumfries Museum	Yes - Partially	MAG	DG	Dumfries & Galloway	F
LA	Dunbar Town House Museum and Gallery	Yes - Partially	MAG	ED	East Lothian	F
HES	Dunblane Cathedral	Yes - Fully	WS	AR	Stirling	F
CT	Dundee Museum of Transport	Yes - Fully	MAG	AN	Dundee City	P
HES	Dunfermline Abbey and Palace	Yes - Partially	WS	FI	Fife	P
P	Dunnottar Castle	Yes - Partially	C	AB	Aberdeenshire	P
HES	Dunstaffnage Castle	Yes - Fully	C	AR	Argyll & Bute	P
HES	Edinburgh Castle	Yes - Partially	C	ED	Edinburgh, City of	P
CT	Eilean Donan Castle and Visitor Centre	Yes - Partially	C	HI	Highland	F
HES	Elgin Cathedral	Yes - Partially	OHP	AB	Moray	P
NTS	Elli House (Dunkeld)	Yes - Partially	ON	PE	Perth & Kinross	F

NTS	Fair Isle	Yes - Partially	HH	GG	Glasgow City	P
NTS	Falkland Palace	Yes - Partially	HH	DG	Dumfries & Galloway	P
HES	Fort George	Yes - Fully	C	HI	Highland	P
G	Forvie National Nature Reserve	Yes - Partially	ON	AB	Aberdeenshire	F
P	Fursbreck Pottery	Yes - Fully	CR	OR	Orkney Islands	F
NTS	Fyvie Castle	Yes - Partially	HH	FI	Fife	P
CT	Gairloch Museum	Yes - Fully	MAG	HI	Highland	P
NTS	Geilston Garden	Yes - Fully	ON	HI	Highland	F
NTS	Georgian House	Yes - Partially	G	AR	Argyll & Bute	P
P	Gilnockie Tower	Yes - Fully	OHP	DG	Dumfries & Galloway	P
HES	Glasgow Cathedral	Yes - Fully	WS	GG	Glasgow City	F
CT	Glasgow Science Centre	Yes - Partially	MAG	GG	Glasgow City	P
NTS	Glencoe Visitor Centre	Yes - Fully	G	AR	Argyll & Bute	P
NTS	Glenfinnan Monument	Yes - Fully	ON	HI	Highland	F
NTS	Goatfell	Yes - Fully	HH	AY	South Ayrshire	F
CT	Grampian Transport Museum	Yes - Partially	MAG	AB	Aberdeenshire	P
NTS	Greenbank Garden	Yes - Partially	HH	AB	Aberdeenshire	P
NTS	Grey Mare's Tail	Yes - Fully	HH	AB	Aberdeenshire	P
RO	Greyfriars Kirk, Edinburgh	Yes - Partially	WS	ED	Edinburgh, City of	F
CT	Groam House Museum	Yes - Partially	MAG	HI	Highland	F
NTS	Haddo House	Yes - Partially	C	AB	Aberdeenshire	P
G	Hermaness NNR	Yes - Partially	ON	SH	Shetland Islands	F
NTS	Hermitage	Yes - Fully	HH	GG	Glasgow City	P
NTS	Hill House	Yes - Fully	ON	PE	Perth & Kinross	F
NTS	Hill of Tarvit	Yes - Partially	ON	AR	Argyll & Bute	F
CT	Historylinks Museum	Yes - Fully	MAG	HI	Highland	P
NTS	Holmwood House	Yes - Partially	HH	AR	Argyll & Bute	P
HES	Huntly Castle	Yes - Fully	C	AB	Aberdeenshire	P
HES	Inchcolm Abbey	Yes - Partially	OHP	FI	Fife	P
NTS	Inveresk Lodge Garden	Yes - Partially	G	ED	Edinburgh, City of	P
NTS	Inverewe Garden	Yes - Partially	HH	FI	Fife	P
HES	Jedburgh Abbey	Yes - Partially	OHP	SB	Scottish Borders	P
LA	John Gray Centre Museum	Yes - Partially	MAG	ED	East Lothian	F
CT	John Muir's Birthplace	Yes - Partially	MAG	ED	East Lothian	F

NTS	Killiecrankie Visitor Centre	Yes - Partially	ON	AR	Argyll & Bute	F
P	King Robert the Bruce's Cave	Yes - Fully	OHP	DG	Dumfries & Galloway	P
P	Kingsbarns Distillery & Visitor Centre and Darnley's Gin Distillery	Yes - Partially	D	FI	Fife	P
NTS	Kintail Estate	Yes - Fully	OHP	OH	Eilean Siar	F
NTS	Leith Hall	Yes - Partially	C	AY	South Ayrshire	P
HES	Linlithgow Palace	Yes - Partially	HH	ED	West Lothian	P
P	Loch Shiel Cruises	Yes - Partially	T	HI	Highland	P
P	Logie Steading Visitor Centre	Yes - Fully	ON	AB	Moray	F
LA	Macduff Marine Aquarium	Yes - Fully	Z	AB	Aberdeenshire	P
NTS	Malleny Garden	Yes - Fully	HH	ED	Edinburgh, City of	P
NTS	Mar Lodge Estate	Yes - Partially	HH	ED	East Lothian	P
HES	Melrose Abbey	Yes - Partially	OHP	SB	Scottish Borders	P
CT	Mill on the Fleet	Yes - Fully	HC	DG	Dumfries & Galloway	F
NTS	Moirlanich Longhouse	Yes - Fully	ON	AB	Aberdeenshire	F
CT	Montrose Basin visitor centre	Yes - Partially	Z	AN	Angus	P
CT	Museum of Islay Life	Yes - Partially	MAG	AR	Argyll & Bute	P
LA	Musselburgh Museum	Yes - Partially	MAG	ED	East Lothian	F
LA	National Wallace Monument	Yes - Fully	OHP	AR	Stirling	P
NTS	Newhailes	Yes - Partially	HH	AR	Stirling	P
CT	Newton Stewart Museum	Yes - Partially	MAG	DG	Dumfries & Galloway	P
LA	Orkney Museum	Yes - Partially	MAG	OR	Orkney Islands	F
RO	Paisley Abbey	Yes - Partially	WS	GG	Renfrewshire	F
NTS	Pitmedden Garden & Museum of Farm Life	Yes - Partially	G	ED	East Lothian	P
NTS	Pollok House	Yes - Fully	ON	PE	Stirling	F
NTS	Preston Mill & Phantassie Doocot	Yes - Fully	ON	DG	Dumfries & Galloway	F
LA	Prestongrange Museum	Yes - Partially	MAG	ED	East Lothian	F
NTS	Robert Burns Birthplace Museum	Yes - Fully	ON	AR	Stirling	F
NTS	Robert Smail's Printing Works	Yes - Fully	G	PE	Perth & Kinross	P
P	Scotland's Secret Bunker	Yes - Fully	MAG	FI	Fife	P
CT	Scottish Crannog Centre	Yes - Fully	MAG	PE	Perth & Kinross	P
CT	Scottish Fisheries Museum Trust Ltd	Yes - Fully	MAG	FI	Fife	P
CT	Scottish Maritime Museum	Yes - Fully	MAG	AY	North Ayrshire	P
CT	Scottish Seabird Centre	Yes - Partially	Z	ED	East Lothian	P

CT	Scottish Wildlife Trust - Loch of the Lowes	Yes - Partially	Z	PE	Perth & Kinross	P
P	Skaill House	Yes - Partially	HH	OR	Orkney Islands	P
HES	Skara Brae	Yes - Partially	OHP	OR	Orkney Islands	P
P	Speyside Cooperage Visitor Centre	Yes - Fully	HC	AB	Moray	P
NTS	St Abb's Head	Yes - Partially	HH	HI	Highland	P
HES	St Andrews Castle	Yes - Partially	C	FI	Fife	P
HES	St Andrews Cathedral	Yes - Partially	OHP	FI	Fife	P
CT	St Andrews Preservation Trust Museum	Yes - Partially	MAG	FI	Fife	F
G	St Cyrus Nature Reserve	Yes - Partially	ON	AB	Aberdeenshire	F
HES	Stirling Castle	Yes - Partially	C	AR	Stirling	P
LA	Stirling Old Town Jail	Yes - Fully	OHP	AR	Stirling	P
CT	Strachur Smiddy Museum	Yes - Partially	MAG	AR	Argyll & Bute	P
CT	Tain Through Time	Yes - Partially	MAG	HI	Highland	P
HES	Tantallon Castle	Yes - Fully	C	ED	East Lothian	P
LA	The Biblical Garden Elgin	Yes - Fully	G	AB	Moray	F
CT	The Devil's Porridge Museum	Yes - Fully	MAG	DG	Dumfries & Galloway	P
PLC	The Funhouse	Yes - Partially	AA	HI	Highland	P
NTS	Threave Garden	Yes - Fully	G	GG	East Renfrewshire	P
LA	Tomintoul Museum & Visitor Centre	Yes - Partially	MAG	AB	Moray	F
NTS	Torridon Countryside Centre	Yes - Partially	G	HI	Highland	P
P	Traquair House	Yes - Partially	HH	SB	Scottish Borders	P
O	University of Dundee Botanic Garden	Yes - Partially	G	AN	Dundee City	P
HES	Urquhart Castle	Yes - Partially	C	HI	Highland	P
CT	Water of Leith Visitor Centre	Yes - Partially	ON	ED	Edinburgh, City of	F
CT	West Highland Museum Trust	Yes - Partially	MAG	HI	Highland	F
P	Winton Castle	Yes - Fully	HH	ED	East Lothian	P
RO	Yester Parish Church	Yes - Partially	WS	ED	East Lothian	F

Table 2.2 Scottish Visitor Attractions Remaining Closed in 2020 (in alphabetical order)

<i>Owner</i>	<i>Attraction Name</i>	<i>Category</i>	<i>VS Region</i>	<i>Council</i>	<i>Free/Paid</i>
NTS	Abertarff House	HH	GG	Renfrewshire	P
HES	Argyll's Lodging	HH	AR	Stirling	P
NTS	Bachelors Club	OHP	FI	Fife	F
HES	Balvenie Castle	C	AB	Moray	P
NTS	Bannockburn Heritage Centre	ON	SH	Shetland Islands	F
NTS	Barrie's Birthplace	C	AB	Moray	P
HES	Bishop's and Earl's Palaces	HH	OR	Orkney Islands	P
HES	Blackhouse, Arnol	HH	OH	Eilean Siar	P
HES	Bonawe Iron Furnace	OHP	AR	Argyll & Bute	P
HES	Bothwell Castle	C	GG	South Lanarkshire	P
HES	Broch of Gurness	OHP	OR	Orkney Islands	P
HES	Brough of Birsay	OHP	OR	Orkney Islands	P
HES	Cairnpapple Hill	OHP	ED	West Lothian	P
HES	Cardoness Castle	C	DG	Dumfries & Galloway	P
NTS	Carlyle's Birthplace	ON	AY	North Ayrshire	P
HES	Castle Campbell	C	AR	Clackmannanshire	P
CT	Clan Cameron Museum	MAG	HI	Highland	P
CT	Coastal Communities Museum	MAG	ED	East Lothian	F
HES	Corgarff Castle	C	AB	Aberdeenshire	P
HES	Craignethan Castle	C	GG	South Lanarkshire	P
CT	Crawfordjohn heritage venture	MAG	GG	South Lanarkshire	P
CT	Creetown Heritage Museum	MAG	DG	Dumfries & Galloway	P
HES	Crichton Castle	C	ED	Midlothian	P
HES	Crossraguel Abbey	OHP	AY	South Ayrshire	P
HES	Dallas Dhu	D	AB	Moray	P
CT	Douglas Heritage Museum	MAG	GG	South Lanarkshire	F
HES	Duff House Gallery	MAG	AB	Aberdeenshire	P
G	Dufftown Whisky and Heritage Centre	MAG	AB	Moray	F
HES	Dundrennan Abbey	OHP	DG	Dumfries & Galloway	P
HES	Edzell Castle	C	AN	Angus	P
HES	Elcho Castle	C	PE	Perth & Kinross	P

CT	Elgin Museum	MAG	AB	Moray	F
CT	Findhorn Heritage Centre & Ice House	HC	AB	Moray	F
CT	Fraserburgh Heritage Centre	MAG	AB	Aberdeenshire	P
NTS	Gladstone's Land	ON	AY	North Ayrshire	F
CT	Glen Tanar Visitor Centre	ON	AB	Aberdeenshire	F
HES	Glenluce Abbey	OHP	DG	Dumfries & Galloway	P
CT	Grangemouth Heritage Trust	MAG	AR	Falkirk	F
HES	Hackness Battery & Martello Tower	OHP	OR	Orkney Islands	P
HES	Hermitage Castle	C	SB	Scottish Borders	P
NTS	House of Binns	G	AR	Argyll & Bute	P
NTS	House of Dun	ON	HI	Highland	F
NTS	Hugh Miller's Cottage	HH	ED	Edinburgh, City of	P
HES	Huntingtower Castle	C	PE	Perth & Kinross	P
HES	Inchmahome Priory	OHP	AR	Stirling	P
NTS	Iona	ON	AR	Argyll & Bute	F
HES	Iona Abbey & St Columba Centre (Mull)	HC	AR	Argyll & Bute	P
HES	Jarlshof	OHP	SH	Shetland Islands	P
NTS	Kellie Castle	HH	DG	Dumfries & Galloway	P
HES	Kildrummy Castle	C	AB	Aberdeenshire	P
HES	Kisimul Castle	C	OH	Eilean Siar	P
CT	Linlithgow Canal Centre	ON	ED	West Lothian	F
CT	Linlithgow Museum	MAG	ED	West Lothian	F
HES	Loch Leven Castle	C	PE	Perth & Kinross	P
HES	Maclellan's Castle	C	DG	Dumfries & Galloway	P
HES	Maeshowe	OHP	OR	Orkney Islands	P
HES	Meikle Sculptured Stone Museum	MAG	AN	Perth & Kinross	P
CT	Museum of Abernethy	MAG	PE	Perth & Kinross	F
HES	New Abbey Corn Mill	OHP	DG	Dumfries & Galloway	P
HES	Newark Castle	C	GG	Inverclyde	P
CT	Old Haa	MAG	SH	Shetland Islands	F
P	Quendale Watermill Visitor Attraction	OHP	SH	Shetland Islands	P
HES	Rothsay Castle	C	AR	Argyll & Bute	P
PLC	Savings Banks Museum	MAG	DG	Dumfries & Galloway	F

LA	Scottish Fire and Rescue Service Museum and Heritage Centre	MAG	GG	Inverclyde	F
HES	Seton Collegiate Church	OHP	ED	East Lothian	P
CT	Sma` Shot Cottages	HC	GG	Renfrewshire	F
HES	Smailholm Tower	OHP	SB	Scottish Borders	P
NTS	Souter Johnnies Cottage	HH	AY	South Ayrshire	F
HES	Spynie Palace	HH	AB	Moray	P
LA	St Athernase Norman Church	WS	FI	Fife	F
NTS	St Kilda	G	AB	Aberdeenshire	P
RO	St Mary's Parish Church	WS	ED	East Lothian	F
HES	St Serfs	OHP	PE	Perth & Kinross	F
HES	St Vigean's Museum	MAG	AN	Angus	P
NTS	Staffa National Nature Reserve	ON	SB	Scottish Borders	F
HES	Stanley Mills	OHP	PE	Perth & Kinross	P
CT	Strathnaver Museum	MAG	HI	Highland	P
HES	Sweetheart Abbey	OHP	DG	Dumfries & Galloway	P
NTS	Tenement House	G	FI	Fife	P
HES	Threave Castle	C	DG	Dumfries & Galloway	P
HES	Tolquhon Castle	C	AB	Aberdeen City	P
CT	Trades Hall	HH	GG	Glasgow City	F
HES	Trinity House Maritime Museum	MAG	ED	Edinburgh, City of	F
O	Uig Heritage Centre	HC	OH	Eilean Siar	P
O	University of Dundee Museums	MAG	AN	Dundee City	F
NTS	Weaver's Cottage	HH	ED	West Lothian	P

2.3. Additional Analysis

The information below has been included to illustrate 2019 Scottish visitor attraction numbers, potentially the last 'normal' year in tourism for the next couple at least, and to demonstrate the extent of 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.

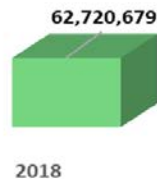
The following tables consider attraction operators who provided comparable visitor statistics for 2019 and 2018.

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: August 2020 - Overview

Some 548 attraction operators provided figures for the month of May 2020 with 538 attractions providing comparable visits figures. The total number of visits for the responding 538 barometer attractions in Scotland for the period May 2020 was 123,937. When compared to data from the previous year of 3,939,468 visits, this shows a visits decrease of -96.8%.

The following tables consider attraction operators who provided comparable visitor statistics for January-May 2020 and January-May 2019.

Table 2.3 Scottish Visitor Attraction Barometer August 2020 – Overview

Admission	Sample	Visits August 2020	Visits August 2019	% 20/19	Diff (20-19)
Free	238	1,036,647	3,396,192	-69.5	-2,359,545
Paid	305	679,316	2,771,969	-75.5	-2,092,653
Total	543	1,715,963	6,168,161	-72.2	-4,452,198

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Table 2.4 Scottish Visitor Attraction Barometer January - August 2020 – Overview

Admission	Sample	Visits Jan – Aug 2020	Visits Jan – Aug 2019	% 20/19	Diff (20-19)
Free	238	6,388,777	17,613,703	-63.7	-11,224,926
Paid	305	2,376,082	12,544,961	-81.1	-10,168,879
Total	543	8,764,859	30,158,664	-70.9	-21,393,805

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Information extracted from the Moffat Centre Scottish Visitor Attraction Barometer – August 2020