SCOTTISH VISITOR ATTRACTION MONITOR

2019

EDITION

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Hugh Sheridan
Moffat Centre for Travel and Tourism Business Development

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Definition of a Visitor Attraction

“An attraction whose primary purpose is sightseeing; a visitor attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. Also the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment, etc.”

Confidentiality

Visits figures are not published in the report if the tourist attraction operator/respondent indicated figures should remain confidential. However they are used in aggregate figures and other calculations.

Admission

Where there is no admission charge, ‘F’ denotes free entry to the main element of the attraction. Such attractions may include elements with an admission charge, but the majority of visits to an attraction noted ‘F’ will be free of charge.

Percentage Change

Percentage changes 2019/2018 are rounded to a maximum of two decimal points.

Monthly visits

Monthly breakdown of visits are only used to show the distribution of visits/seasonality across the year. Attractions providing monthly breakdown may provide exact figures to part of their operation and exclude estimated figures to the total site. Hence sometimes these figures do not reflect total visits.

Analysis Variables & Changes to Methodology

Variables used in this report to analyse 2019 data are he same as those used in the 2018 report. Further details isincluded in the Appendices.

HIGHLIGHTS 2019

2019 proved to be a good year for many Scottish visitor attractions, with an increase in visits of 4% compared with 2018.

Former VisitScotland Regions

The change in number of visits varied across Scotland, with attractions in Angus & City of Dundee experienced the greatest percentage increase in visits at 26% and Greater Glasgow & Clyde Valley experiencing the highest increase in terms of number of visits recorded compared to other Former VisitScotland Regions when comparing 2019 with 2018. Conversely visits to attractions in The Shetland Islands witnessed the greatest percentage reduction at -13% whilst Edinburgh & Lothian attractions experienced the greatest decrease in visits figures at -201,407.

Attraction Category

When exploring visits to attraction categories, the Museums/Art Galleries category experienced the greatest percentage increase in visits at 15% comparing 2019 with 2018. Those attractions in the Transport-Related Attractions category experienced the greatest decreases at -10%.

Admission

Once again Free admission attractions welcomed significantly more visits than Paid admission attractions in Scotland in 2019. Some 332 Free admission attractions welcomed over 44,688,034 visitors, over twice as many visits when comparing the visitor numbers to the 346 Paid admission attractions which welcomed 20,526,928 in 2019. Greater Glasgow & Clyde Valley boasted the highest percentage of free admission visitor attractions at 67% of all participating attractions. These free admission attractions witnessed 16.9 million visits in 2019. Those free admission attractions such as Outdoors/Nature attractions, Places of Worship/Spiritual attractions and Scottish Craft/Retail attractions, with over 100,000 annual visits, welcomed 60% of all visits to attractions in in 2019.

Child and School Visitation

Greater Glasgow & Clyde Valley welcomed the highest percentage of children in 2019, whilst the Shetland Islands welcomed the highest proportion of adult visitors. Visits to Distilleries/Breweries/Wineries were made predominantly by adults (96.1%) with Outdoors/Nature attractions welcoming the largest percentage of child visits in 2019 at 46.9% of all visits. Overall, school visits made up 2.4% of all reported visits to Scottish visitor attractions in 2019. Greater Glasgow, Museums/Art Galleries, Large Urban attractions, and those attracting over 100,000 visits recorded the greatest number of visits from schools in 2019. Kingdom of Fife, attractions welcoming between 5,000 and 9,999 annual visits, Accessible Small Towns and Wildlife/Animal Attractions recorded the greatest proportion of school visits in 2019.

Overseas and Domestic Visitation

Perthshire, Castles/Forts, Remote Rural areas and Islands-based Attractions welcomed the greatest proportion of Overseas visits in 2019. Visitors from England, Northern Ireland and Wales constituted the biggest group visiting attractions in Outer Hebrides, Industrial/Workplaces and Remote Small Towns. Kingdom of Fife, Outdoors/Nature attractions, Accessible Small Towns and attractions welcoming more than 100,000 visits per year received most of their visits from Locals.

Average Visits Spends

Visits to Transport-Related attractions, attractions in Argyll, Loch Lomond & The Forth Valley (ALLFV), attractions welcoming over 100,000 visits, Inland and Large Urban Area Attractions generated the highest Average Admission Spend per visit within their category. Distillery/ Breweries/ Wineries, attractions in the ALLFV region, attractions welcoming between 10,000 and 19,999 visits, Islands and Remote Small Towns attractions generated the highest Average Retail Spend per visit within their category. Distillery/Breweries/ Wineries, attractions in the Kingdom of Fife Area, attractions welcoming between 10,000 and 19,999 visits, those located on Islands and Remote Small Towns generated the highest Average Catering Spend per Visit within their category.

METHODOLOGY

From 1998 until 2009, the Visitor Attraction Monitor (VAM) research was undertaken and published on behalf of VisitScotland by the Moffat Centre for Travel and Tourism Business Development, Glasgow Caledonian University. From May 2010 the Moffat Centre has undertaken this valuable research independently.

For the VAM 2019, survey questionnaires were distributed to 822 visitor attractions across Scotland. Some 735 responses were received, providing an overall response rate of 89.4% (see Table 1 below). Attractions included in the 2017 VAM are those where visits can be reasonably accurately recorded.

To increase completion rates, the questionnaire was distributed via the Visitor Attraction Online Portal, by elecronic survey and via email in a staggered approach from September 2019 until December 2019 taking into account seasonal closure of attractions. A reminder questionnaire was issued at the end of January 2020 to all of those attraction operators who had not responded by the set deadline of 17th January 2020. Further reminders were undertaken by telephone and e-mail between February 2020 and March 2020, when books were closed.

Table 1 **Breakdown of Survey Responses**

RESPONSE TYPE	NO
Cannot complete	7
Completed	687
Does not want to/Refused to complete	0
Permanently Closed	4
Temporarily closed	37

This report provides valuable performance related information of visitor attractions in Scotland for the calendar year 2019.

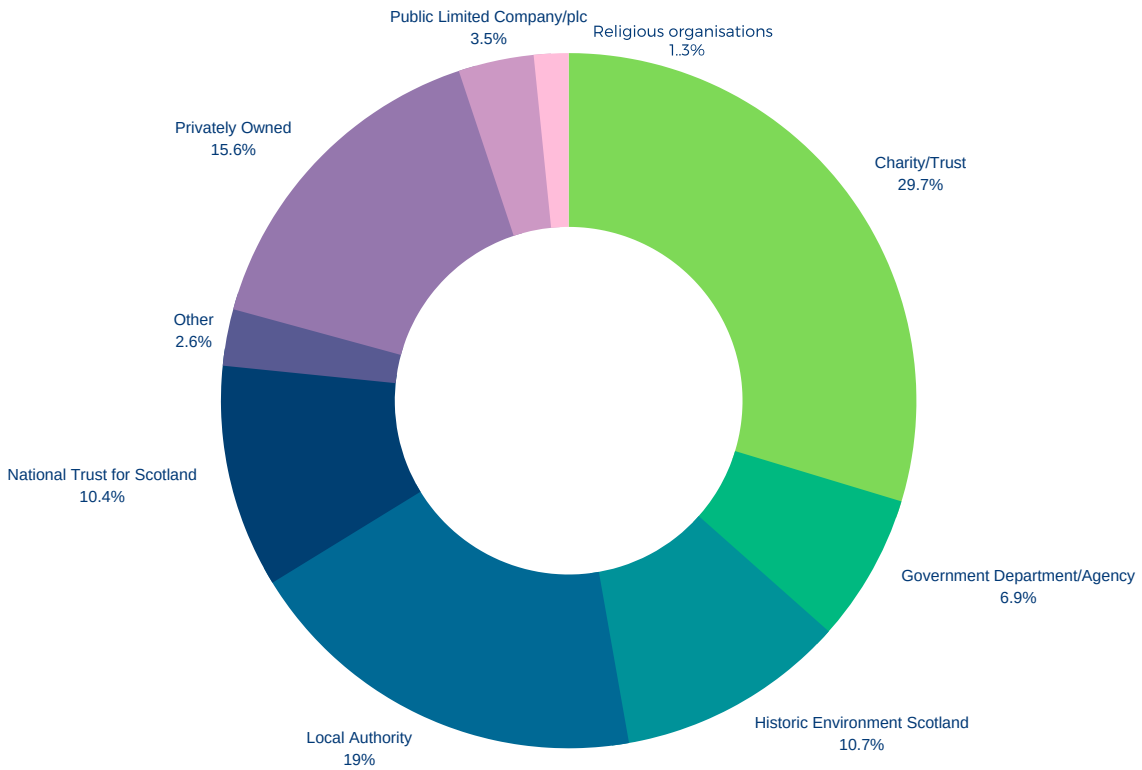
Some 208 attraction operators asked for their data to be kept confidential. This request is respected and at no point are such attractions individually identified or their data identifiable in this report.

Operators who provided visits figures that achieved 'most visited in Scotland' status were asked to confirm the accuracy of the visits figures they submitted prior to publication.

Ownership of responding attractions is illustrated in the graph Below .

As suggested in the graph above, the attraction sector is dominated by the not-for-profit sector with Charitable Organisations (29%) and Local Authorities (19%) accounting for just under 50% of ownership.

Figure 1 **Breakdown of Attractions by Ownership**



Comparative Analysis of Visits to Scottish Visitor Attractions 2019/2018

2019 2018

Some 678 attraction operators provided total visits figures for both years 2019 and 2018.

The following table compares visits performance in 2019 with 2018.

Visitor attractions in Scotland experienced an increase of 4.0% in visits when comparing 2019 with 2018.

Figure 2 Admission Policy 2019 - Overview

Admission Policy - Overview

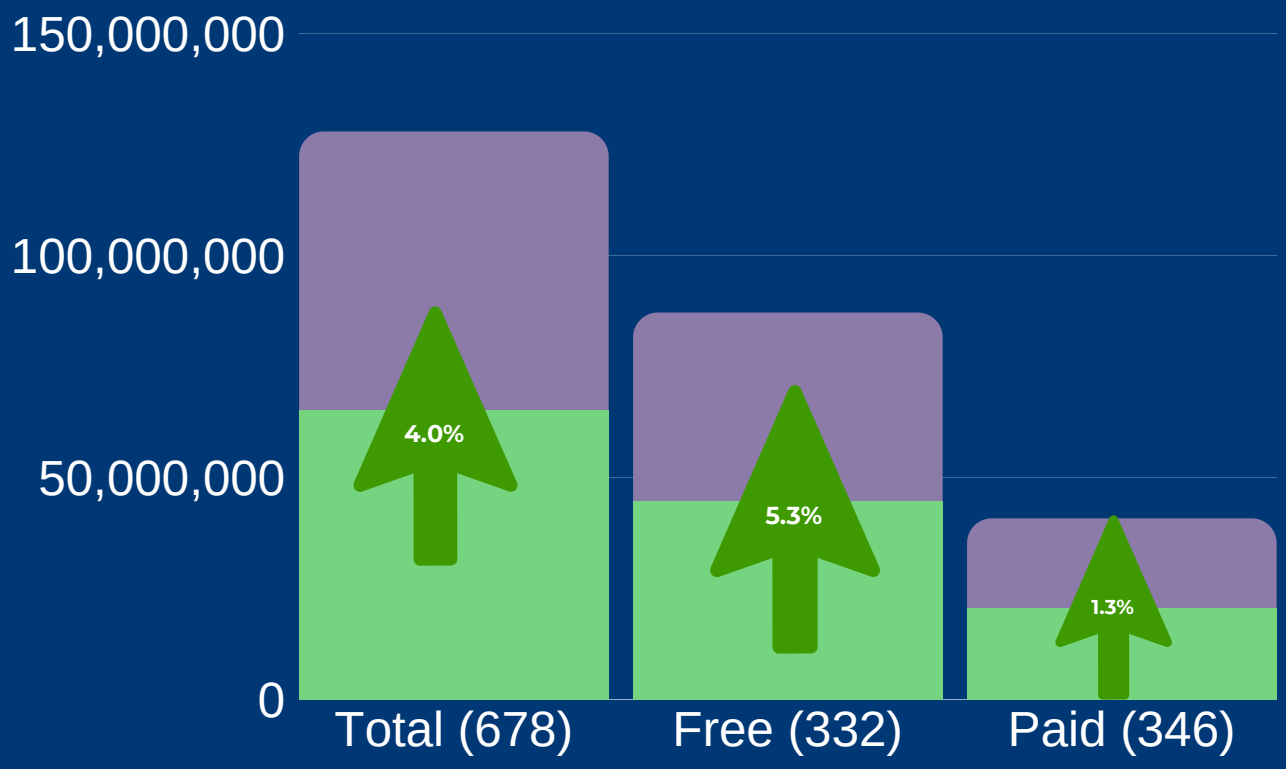


Figure 3 Total Visits 2019/2018 - Overview

Total Visits 2019/2018 - Overview

2019

65,214,962

2018

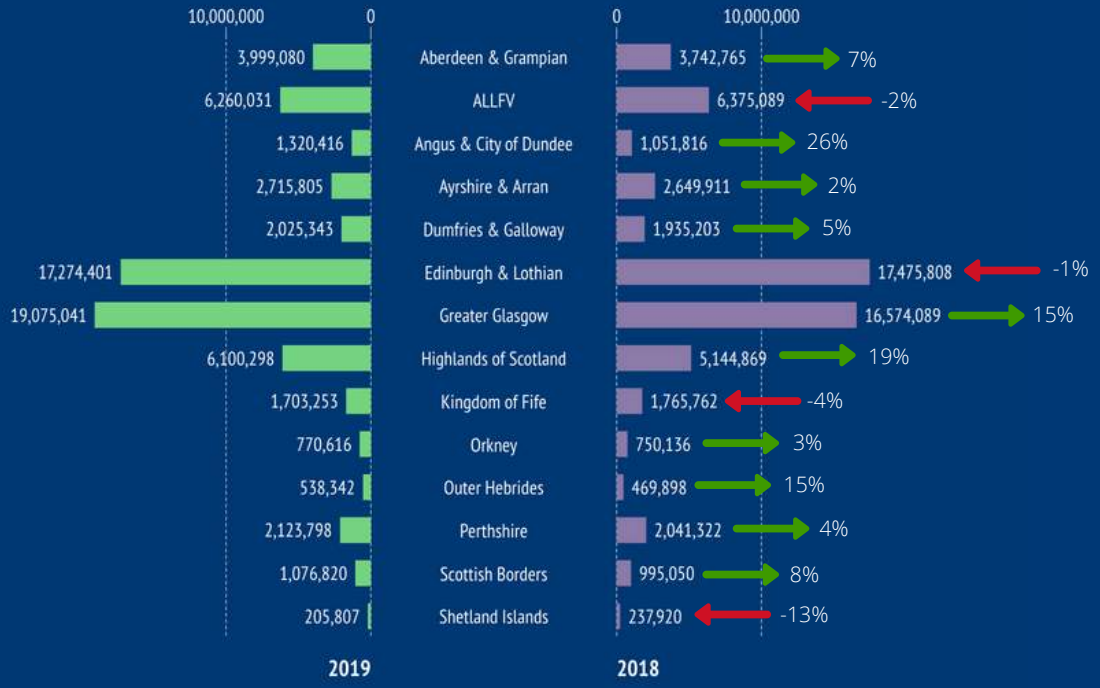
62,720,679

Figure 4 Comparative Analysis of Visits 2019/2018 by: Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location

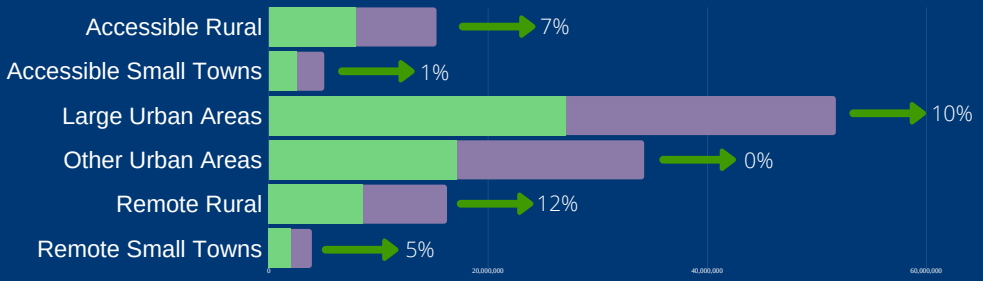
Comparative Analysis of Visits to Scottish Visitor Attractions 2019/2018

2019 2018

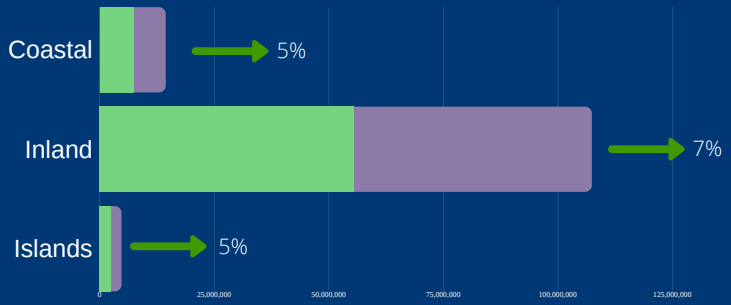
Former VisitScotland Area



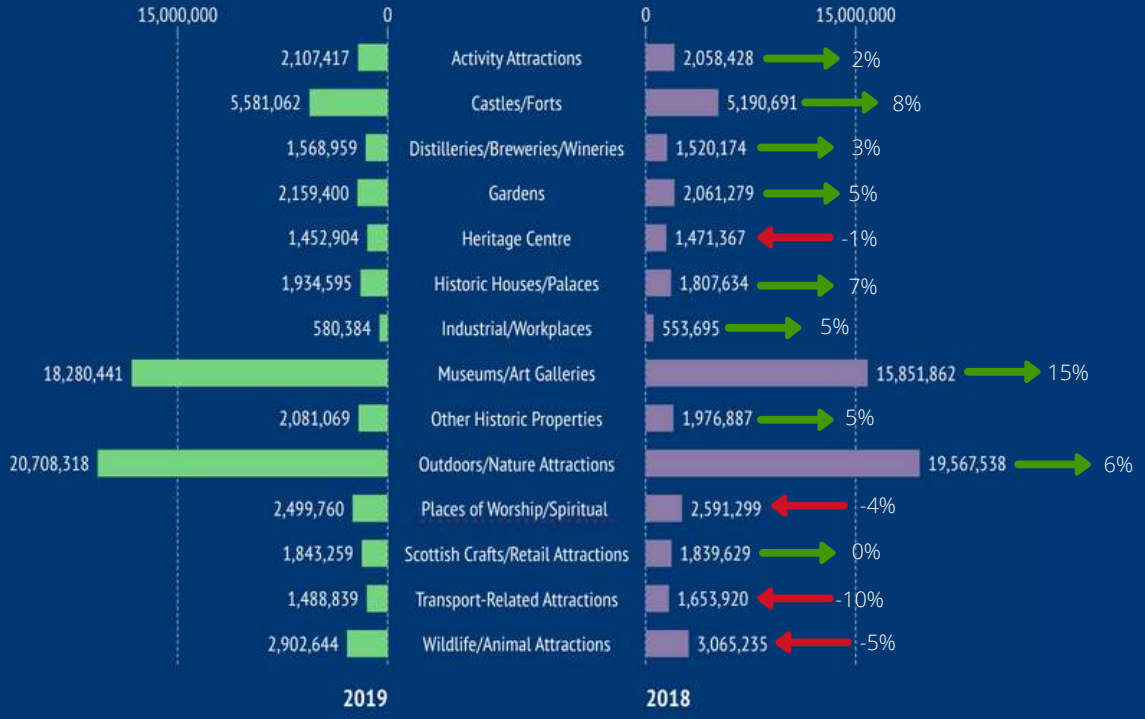
Urban/Rural



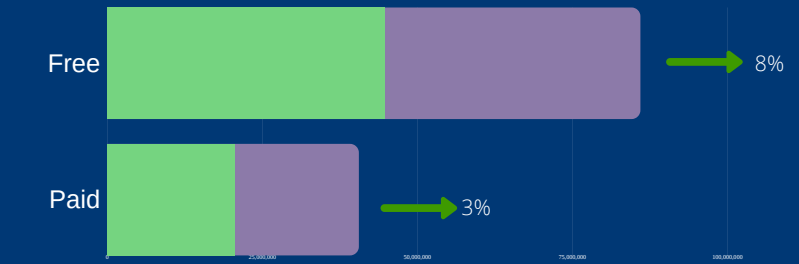
Geographic Location



Category



Admission Cost



Volume of Visits

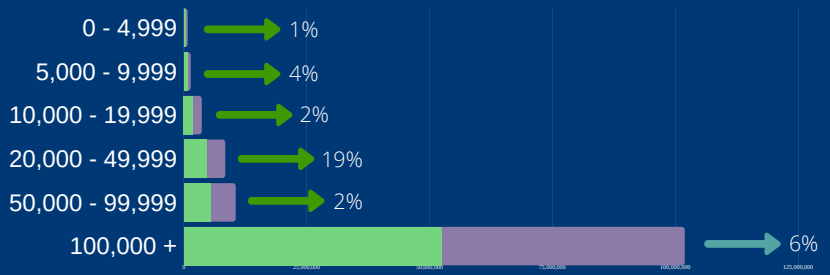


Figure 5 Monthly Distribution of Visits (%) by Admission

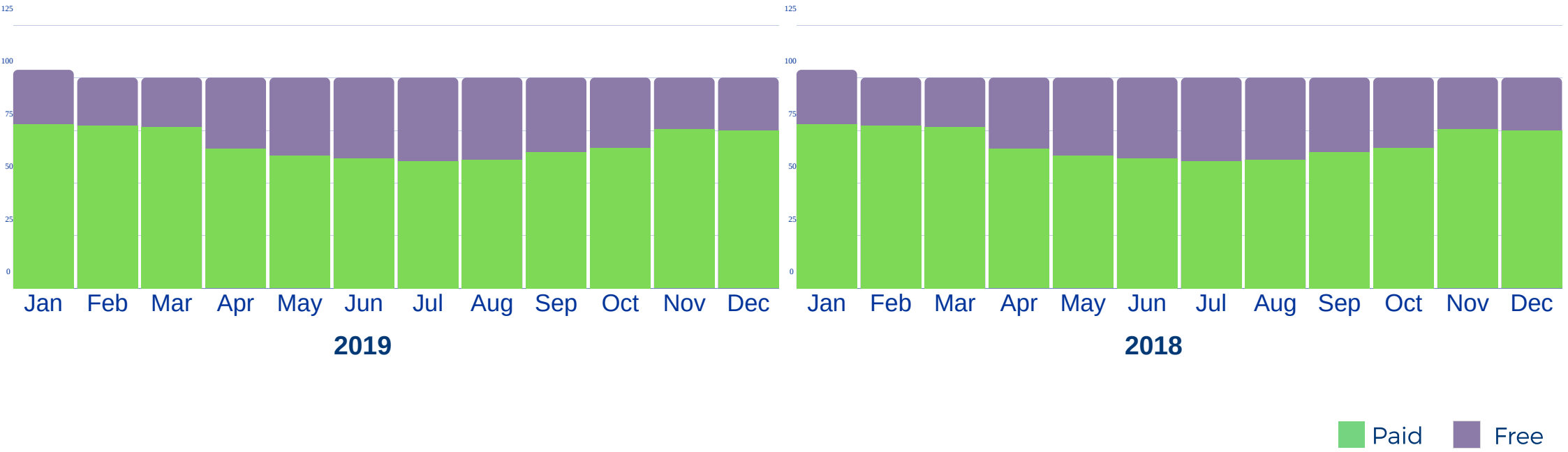
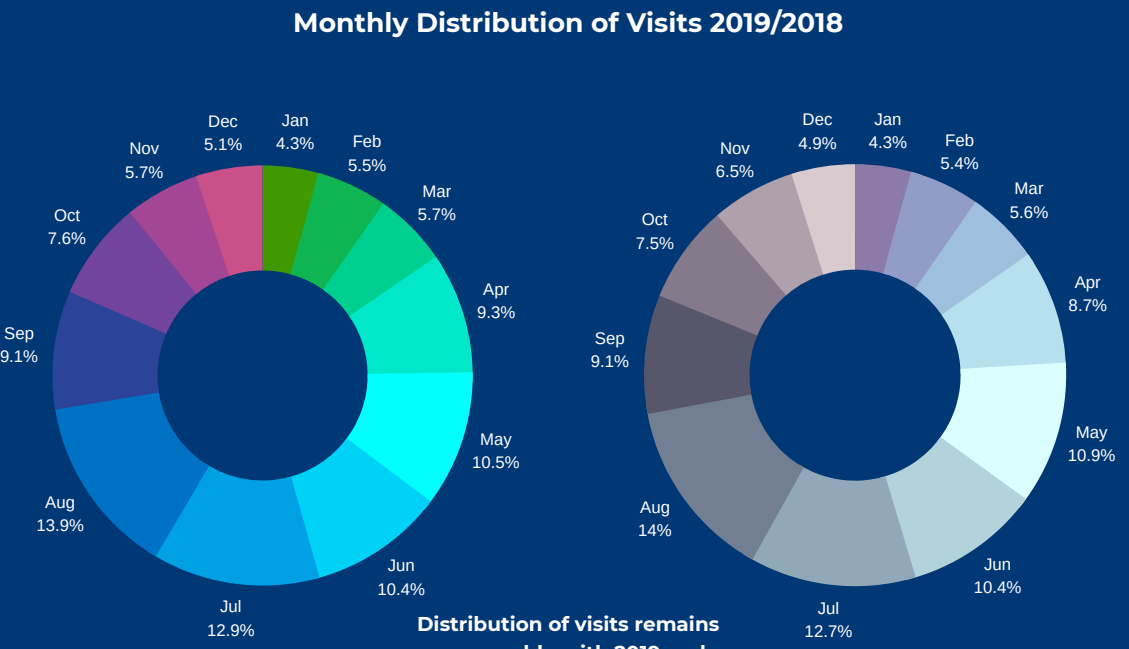
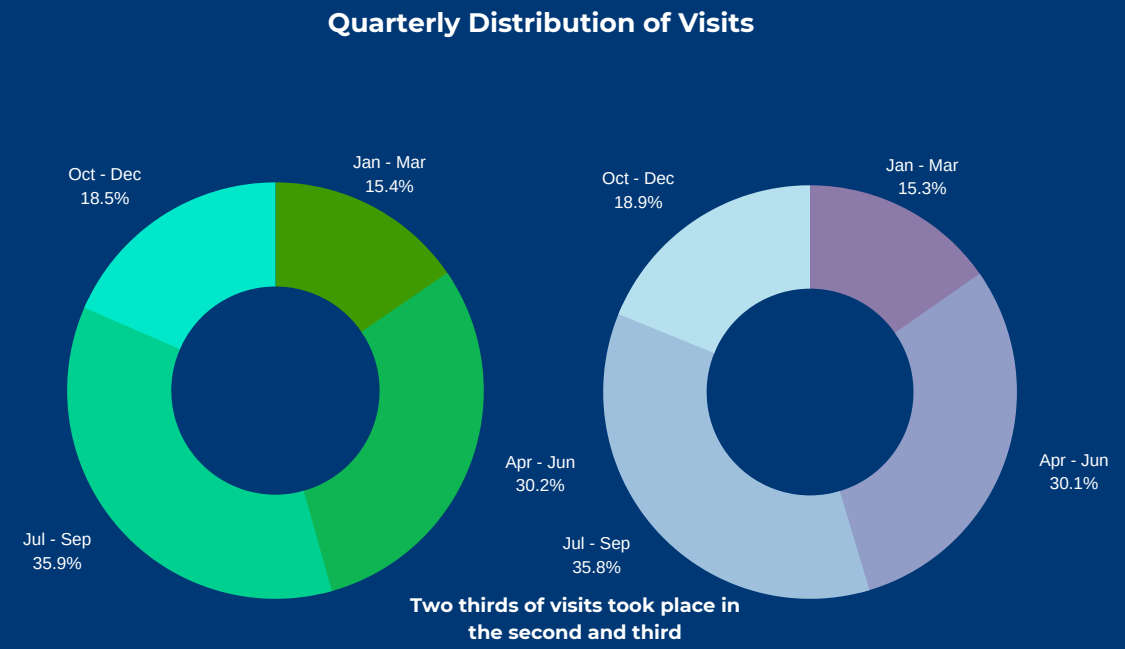


Figure 6 Monthly / Quarterly Distribution of Visits



Distribution of visits remains comparable with 2019 and 2018.



Two thirds of visits took place in the second and third quarters, July and August see visits peaking similar to that of 2019.

Table 2 Comparative Analysis of Visits 2019/2018 by: Category and Former VisitScotland Area

Quarterly Seasonal Analysis by Attraction Category

Category Long	Count	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Total
Activity Attractions	12	275579	728403	757897	348083	2109962
Castles/Forts	59	554583	1793710	2460069	797257	5605619
Distilleries/Breweries/Wineries	7	167189	510894	619147	263437	1560667
Gardens	47	320721	693386	749513	384976	2148596
Heritage Centre	30	69174	221056	261114	96665	648009
Historic Houses/Palaces	22	111385	645528	898878	255520	1911311
Industrial/Workplaces	49	81840	180440	208179	106301	576760
Museums/Art Galleries	248	3482728	4904279	5958692	3865762	18211461
Other Historic Properties	56	167309	707440	912722	303375	2090846
Outdoors/Nature Attractions	93	3151023	5240719	5611240	3350747	17353729
Places of Worship/Spiritual Attractions	7	266845	822349	1087440	389675	2566309
Scottish Crafts/Retail Attractions	11	279596	528631	637904	397128	1843259
Transport-Related Attractions	17	125808	466170	659280	249307	1500565
Wildlife/Animal Attractions	29	370512	976486	1079443	473374	2899815

2019

Category Long	Count	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Total
Activity Attractions	12	162977	131989	142930	32950	470846
Castles/Forts	59	482067	1578393	2237665	981028	5279153
Distilleries/Breweries/Wineries	7	240748	652670	831331	304535	2029284
Gardens	47	275872	619207	643989	330559	1869627
Heritage Centre	30	99888	299535	361302	157678	918403
Historic Houses/Palaces	22	96821	579736	821022	223707	1721286
Industrial/Workplaces	49	2190	15348	19336	4394	41268
Museums/Art Galleries	248	3031266	4705860	5849047	3740593	17326766
Other Historic Properties	56	185764	735512	893711	221819	2036806
Outdoors/Nature Attractions	93	2571070	4225314	4400382	2766642	13963408
Places of Worship/Spiritual Attractions	7	290724	785634	1029278	388905	2494541
Scottish Crafts/Retail Attractions	11	79815	173933	207351	114811	575910
Transport-Related Attractions	17	18017	64051	118392	48656	249116
Wildlife/Animal Attractions	29	469386	1163457	1171734	549242	3353819

2018

Quarterly Seasonal Analysis by Former VS Region

Vs Region Long	Count	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Total
Aberdeen & Grampian	89	802444	1577674	1792226	1162578	5334922
ALLFV	86	423463	1283323	1780169	851196	4338151
Angus & City of Dundee	26	157462	236891	304554	178487	877394
Ayrshire & Arran	31	372604	883295	1029473	619502	2904874
Dumfries & Galloway	48	80229	200578	261386	131226	673419
Edinburgh & Lothian	86	2511204	4404308	5545174	3127367	15588053
Greater Glasgow	74	2826120	4254439	4257751	2648190	13986500
Highlands of Scotland	77	334004	1260800	1801899	469462	3866165
Kingdom of Fife	37	215594	486888	575030	231980	1509492
Orkney	23	37373	304514	380979	45340	768206
Outer Hebrides	12	67684	158593	157675	89349	473301
Perthshire	41	131969	443329	534095	233594	1342987
Scottish Borders	37	26914	165238	212085	64054	468291
Shetland Islands	20	19541	70769	94974	13194	198478

2019

Vs Region Long	Count	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Total
Aberdeen & Grampian	89	586908	1095425	1341526	736339	3760198
ALLFV	86	564794	1816153	2293936	833691	5508574
Angus & City of Dundee	26	270702	382976	438710	220679	1313067
Ayrshire & Arran	31	393076	789760	1008005	588184	2779025
Dumfries & Galloway	48	58298	234601	313716	108172	714787
Edinburgh & Lothian	86	2880272	4991473	5971655	3419556	17262956
Greater Glasgow	74	3674684	5567126	5847060	3712157	18801027
Highlands of Scotland	77	385633	1737670	2460825	740268	5324396
Kingdom of Fife	37	236092	486407	592263	277121	1591883
Orkney	23	28265	292036	397832	54876	773009
Outer Hebrides	12	56260	144475	209342	127817	537894
Perthshire	41	204746	585693	642029	331924	1764392
Scottish Borders	37	74058	224978	275832	115325	690193
Shetland Islands	20	10504	70718	108787	15498	205507

2018

2019

Orkney Islands recorded the most marked seasonal pattern, with half of all recorded visits occurring during the third quarter and low levels of visitation in the first and fourth quarters.

Greater Glasgow & Clyde Valley region saw high seasonal levels of visitors in the first quarters with Aberdeen & Grampian seeing high seasonal in the fourth quarter.

2018

Historic Houses/Palaces recorded the most significant quarterly visitation pattern, with the majority of visits occurring in the second and third quarters whilst seeing low levels of visitation in the first and fourth quarters.

The Visitation Analysis identified that Castles/Forts, Heritage Centres, Other Historic Properties and Transport-Related attractions continued to see 40%+ of all recorded visits occurring during the third quarter of the year, a similar pattern to 2018.

VISITS 2019

This section analyses visits using the data supplied by attractions that submitted completed questionnaires for 2019. Some 687 operators provided visits figures for 2019. The following tables compare visits performance between both Paid and Free Admission attractions.

·Highlights:

· Free Admission attractions welcomed over twice as many visits in 2019 as Paid Admission Attractions.

· Just over 67% of all participating Greater Glasgow & Clyde Valley attractions are free admission attractions.

· Greater Glasgow & Clyde Valley's free attractions welcomed the highest number of visits at over 16.9 million.

· Although attractions welcoming up to 4,999 annual visits constitute just under a quarter of the sample, they welcomed just over 0.5% of reported visits.

· Free Attractions with 100,000 + annual visits welcomed just under 60% of all reported visits to attractions in 2019.

· Castles/Forts, Distilleries/Breweries/Wineries, Historic Houses/Palaces, Other Historic Properties,Transport-Related and Wildlife/Animal Attractions, remain predominantly paid attractions while the reverse is true of Outdoors/Nature Attractions , Places of Worship/Spiritual Attractions and Scottish Craft/Retail Attractions.

· Free Attractions in Accessible Small Towns welcomed just over 83% of all visits with only 17% of visits to Paid Attractions in the equivalent areas.

· The sample size of the Inland Attractions Paid (213) and Free (208) Admission Attractions are very similar. However, Free Admission Inland Attractions welcomed over double the amount of visits, compared to Paid Admission Inland Attractions.

Figure 7 Analysis of Visits 2019 by Admission Policy - Overview

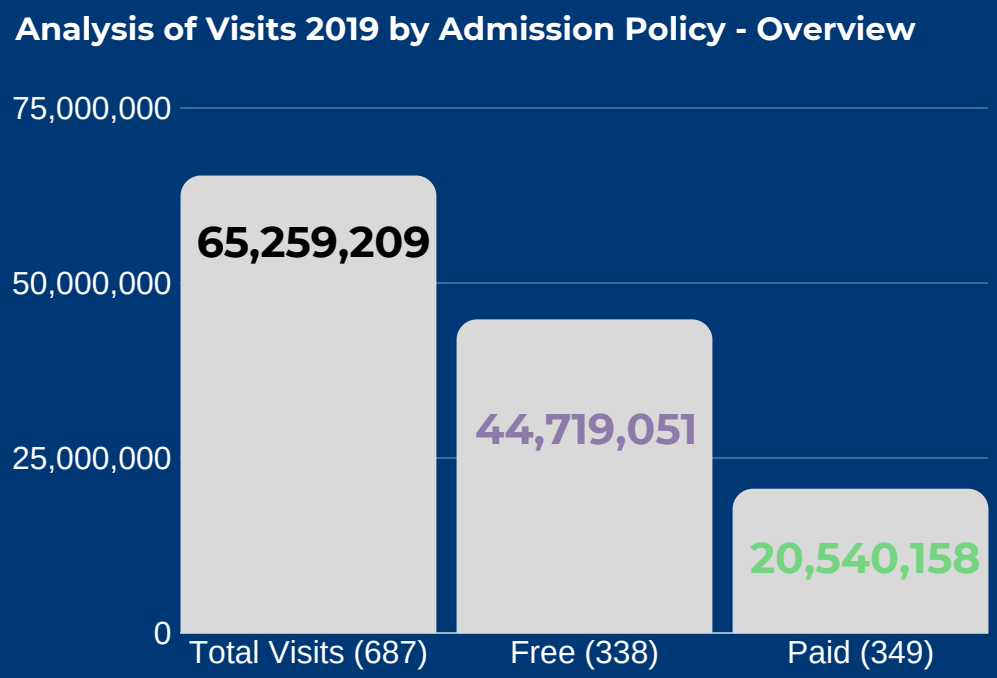
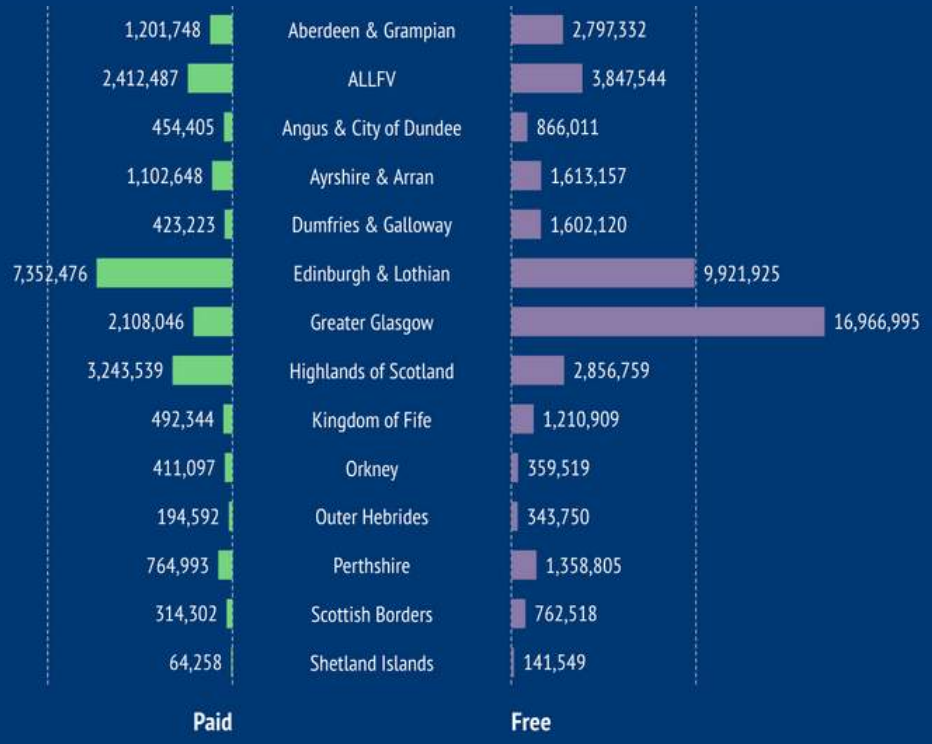


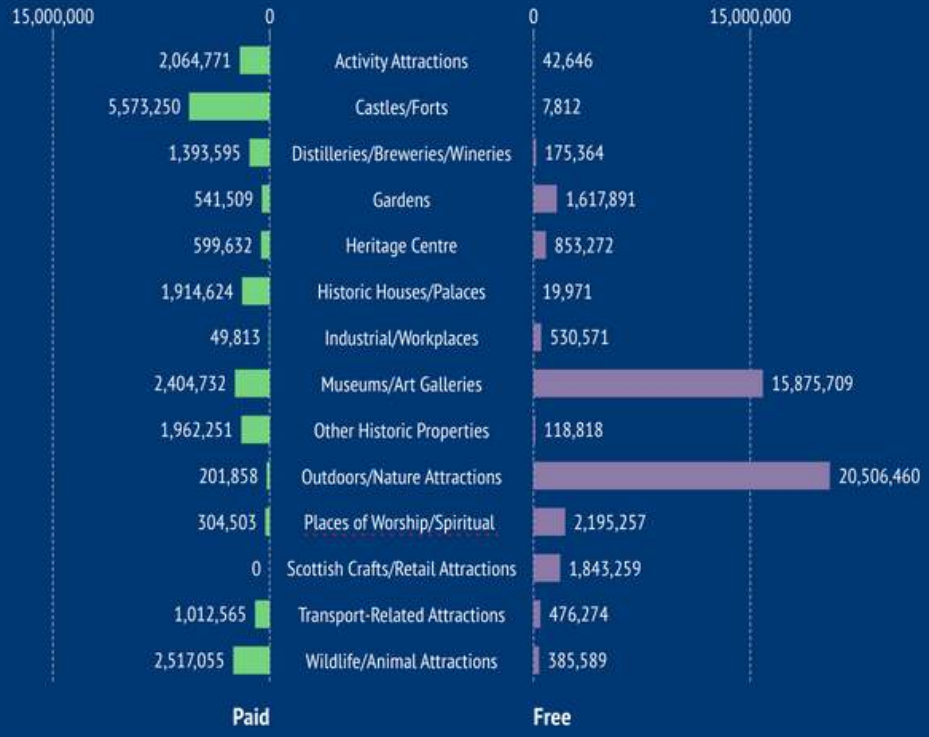
Figure 8 Comparative Analysis of Visits 2019 by: Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location

Analysis of Visits 2019 by Admission Policy

Former VisitScotland Area



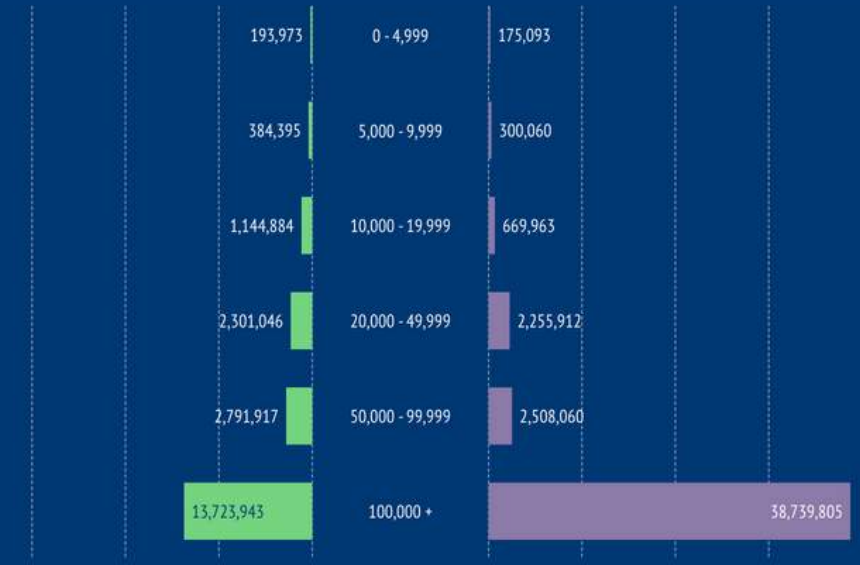
Category



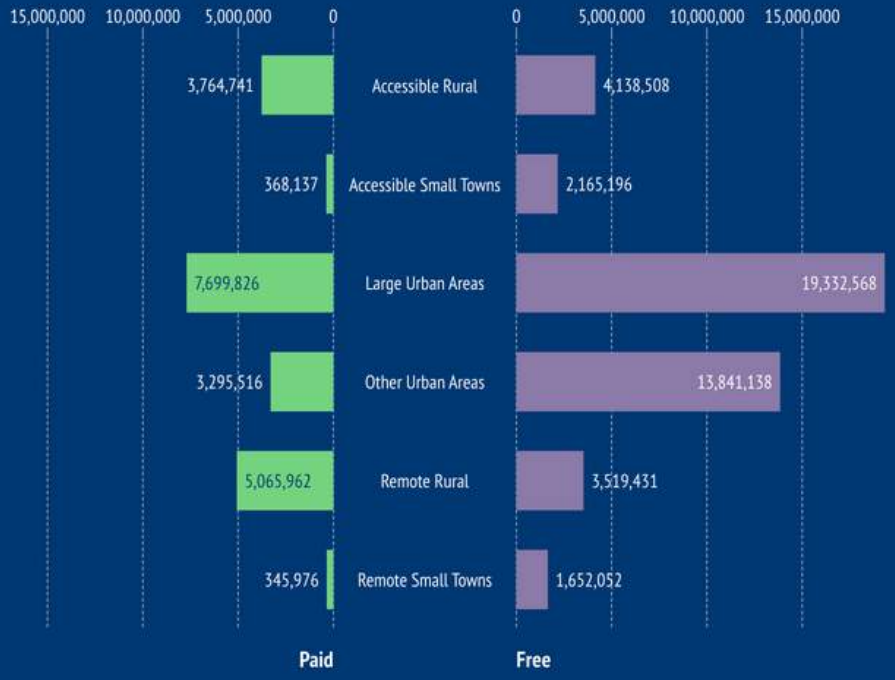
Paid Free

Analysis of Visits 2019 by Admission Policy

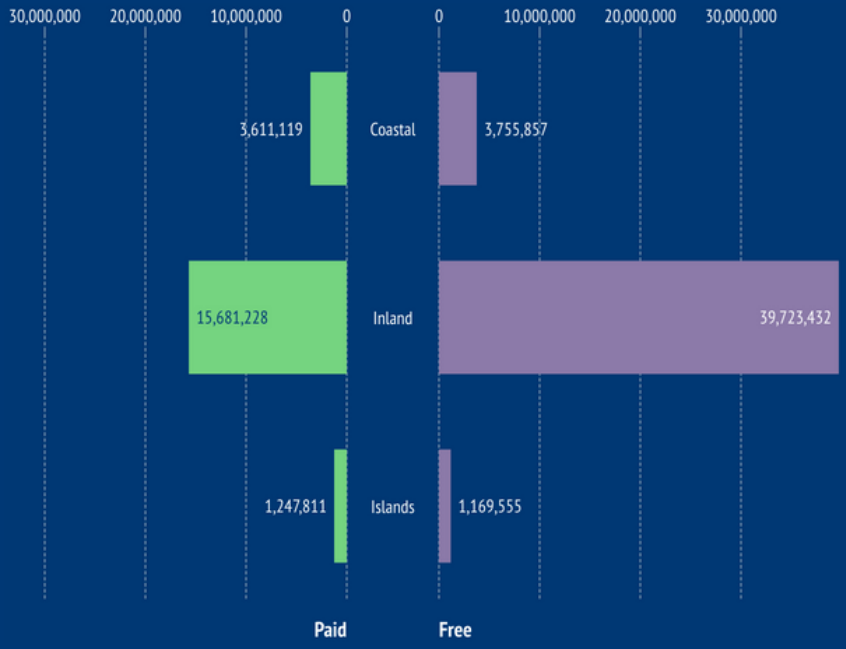
Volume of Visits



Urban/Rural

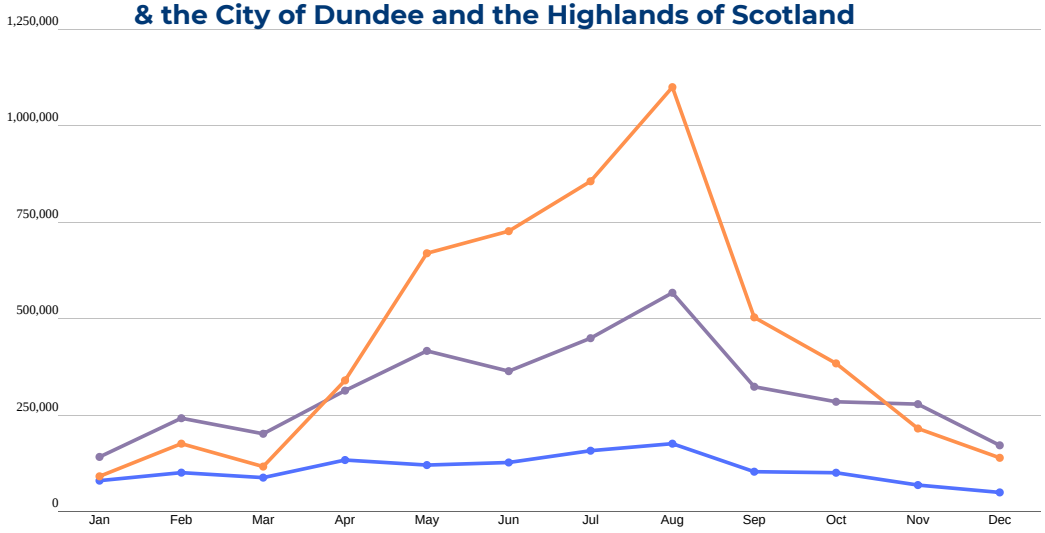


Geographic Location



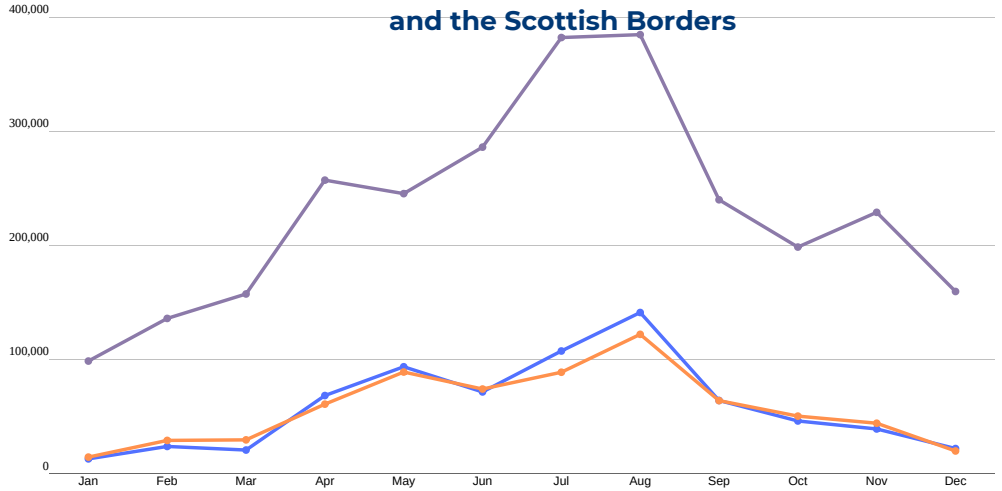
Paid Free

Monthly Visitation Patterns to Aberdeen & Grampian, Angus & the City of Dundee and the Highlands of Scotland



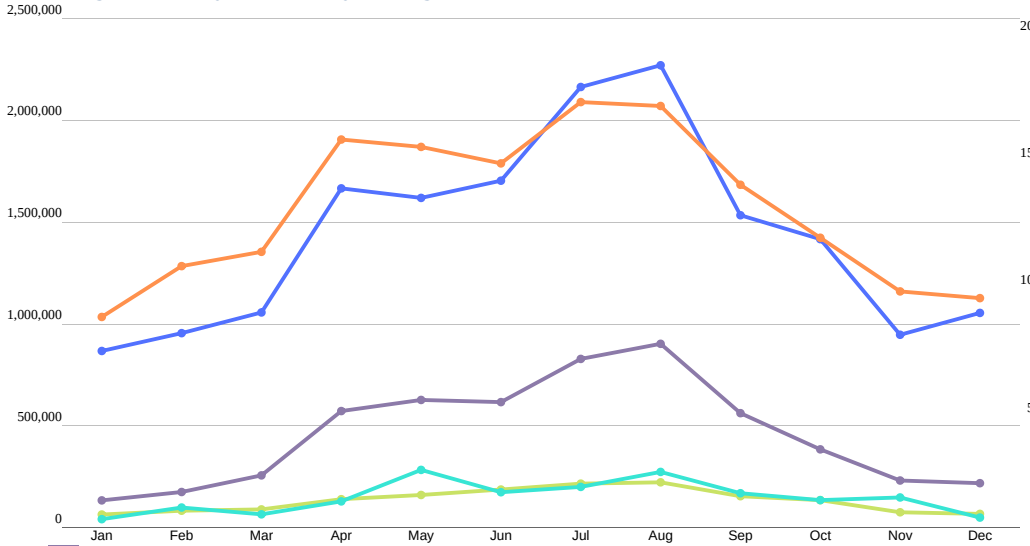
- Aberdeen & Grampian
- Angus & the City of Dundee
- Highlands of Scotland

Monthly Visitation Patterns to Ayrshire & Arran, Dumfries & Galloway and the Scottish Borders



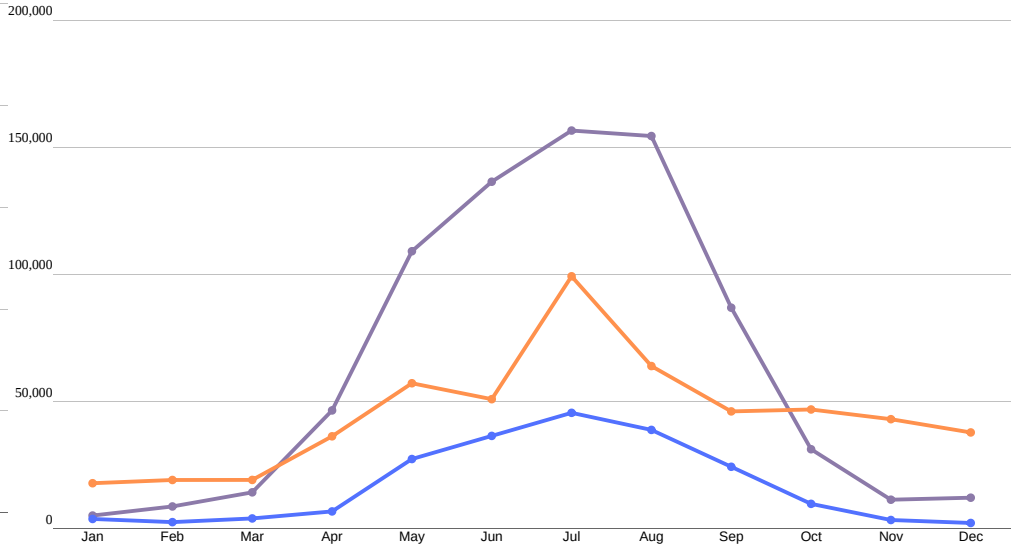
- Ayrshire & Arran
- Dumfries & Galloway
- Scottish Borders

Monthly Visitation Patterns to Edinburgh & Lothians and Greater Glasgow & Clyde Valley, Kingdom of Fife, Perthshire and ALLFV



- ALLFV
- Edinburgh & Lothians
- Greater Glasgow & Clyde Valley
- Kingdom of Fife
- Perthshire

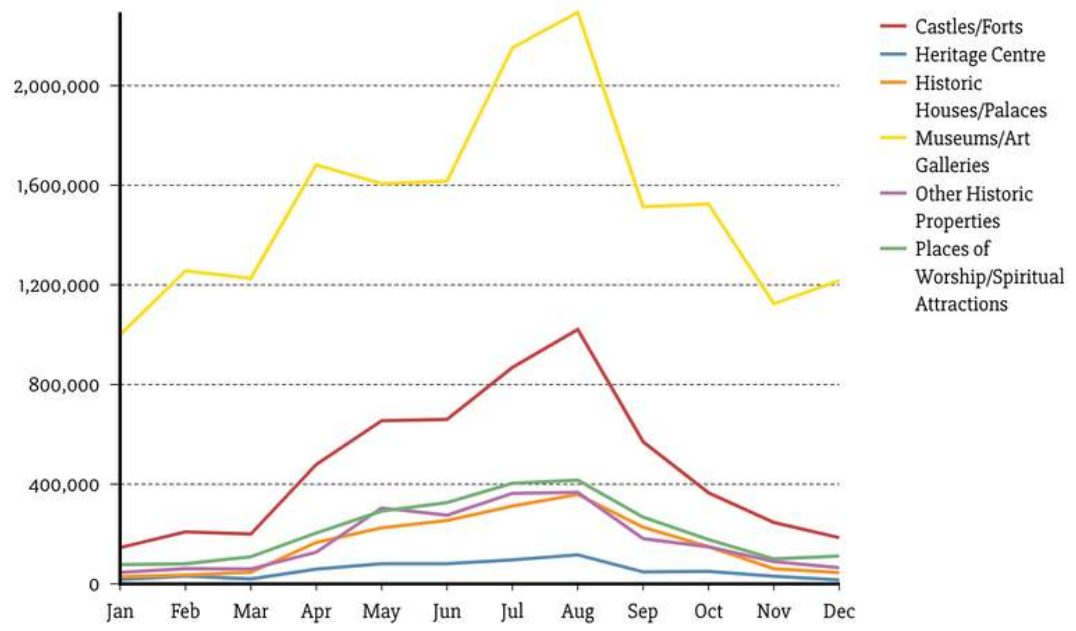
Monthly Visitation Patterns to Orkney, Shetland and the Outer Hebrides



- Orkney
- Shetland
- Outer Hebrides

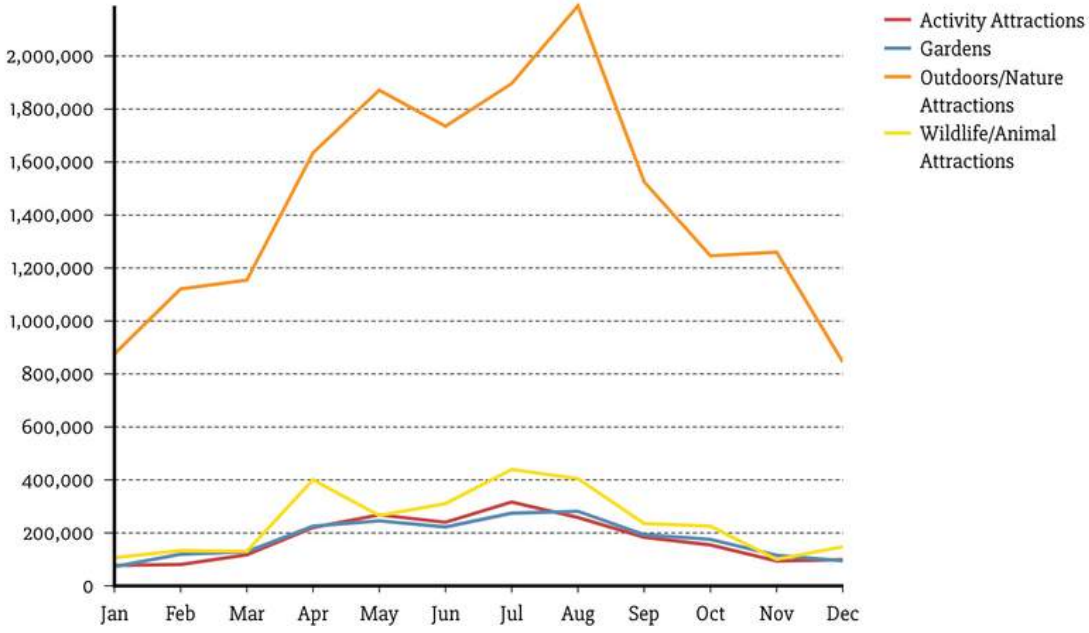
Figure 10 Monthly Visitation Patterns by: Category

Monthly Visitation Patterns to Heritage-Related Attractions



Monthly Visitation Patterns to Industrial/Workplaces, Retail-Oriented Attractions and Transport-Related Attractions

Monthly Visitation Patterns to Outdoors Attractions



VISITOR PROFILE INFORMATION 2019

Highlights:

- Greater Glasgow welcomed the highest percentage of children in 2019, while the Shetland Islands welcomed the highest proportion of adult visitors.
- Visits to Distilleries/Breweries/Wineries were made predominantly by adults (96.1%), with Outdoors/Nature Attractions having the largest percentage of child visits in 2019 at 46.9%.
- Overall, school visits made up 2.4% of all reported visits to Scottish visitor attractions in 2019.
- Greater Glasgow, Museums/Art Galleries, Large Urban Attractions, and those attracting over 100,000 visits recorded the greatest number of visits from schools in 2019 this follows the trend seen in 2018.
- Kingdom of Fife, attractions welcoming between 5,000 & 9,999 annual visits, Accessible Small Towns and Wildlife/Animal Attractions recorded the greatest proportion of school visits in 2019.
- Perthshire, Castles/Forts, Remote Rural areas and Islands-based Attractions welcomed the greatest proportion of Overseas visits in 2019.
- Kingdom of Fife, Outdoors/Nature attractions, Accessible Small Towns and attractions welcoming more than 100,000 visits per year received most of their visits from Locals.
- Visitors from England, Northern Ireland and Wales constituted the biggest segment to attractions in Outer Hebrides, Industrial/Workplaces and Remote Small Towns Attractions.

Adult & Child Visitation 2019

Figure 11 School Visits 2019 by: Admission Policy

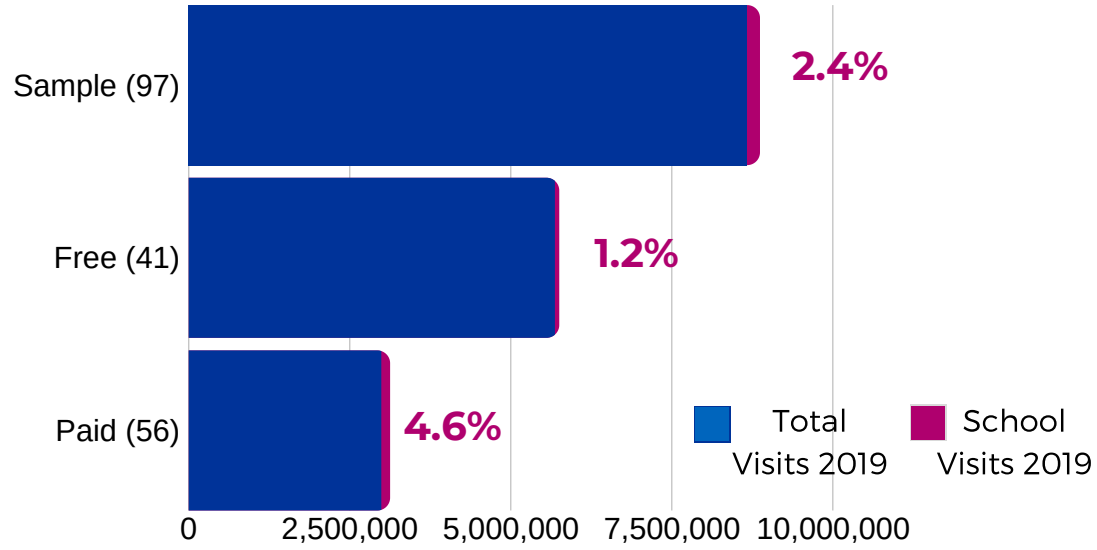
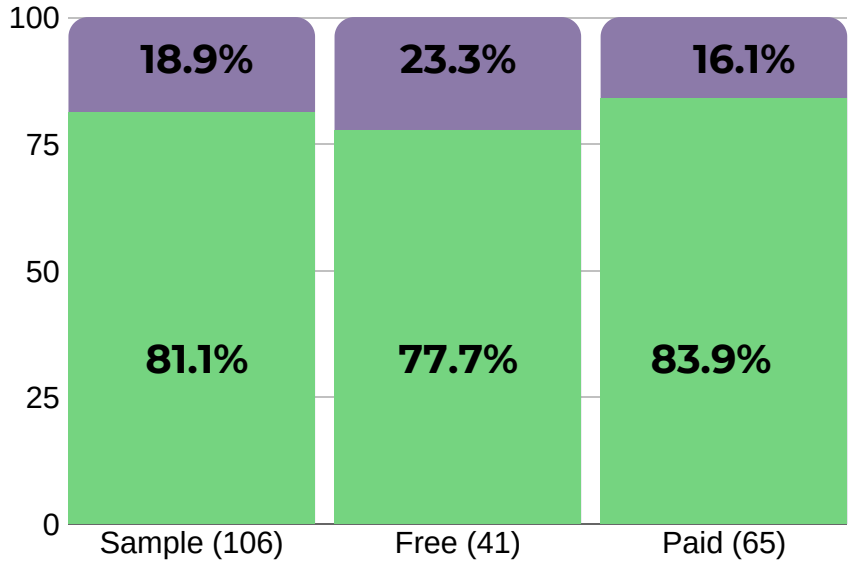
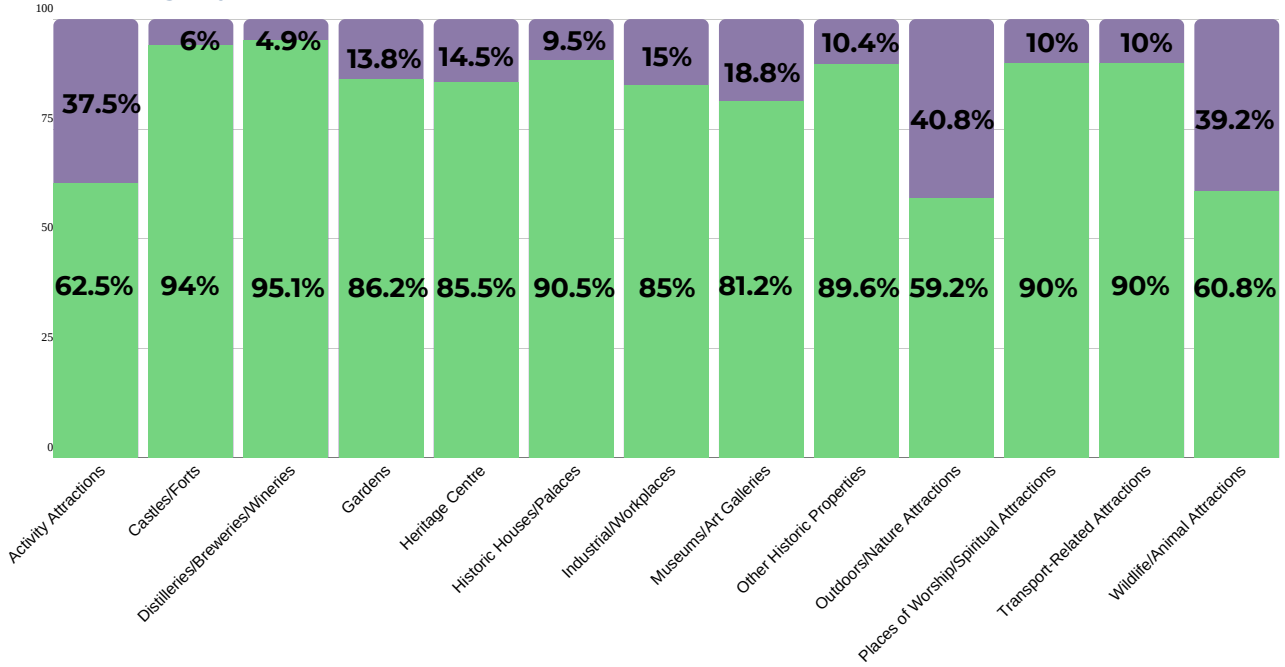


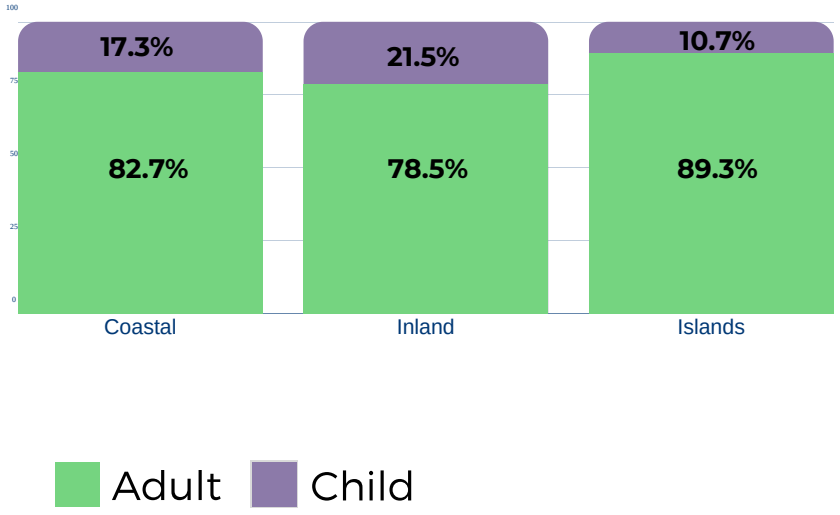
Figure 12 Adult & Child Visitation by: Admission Policy, Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location



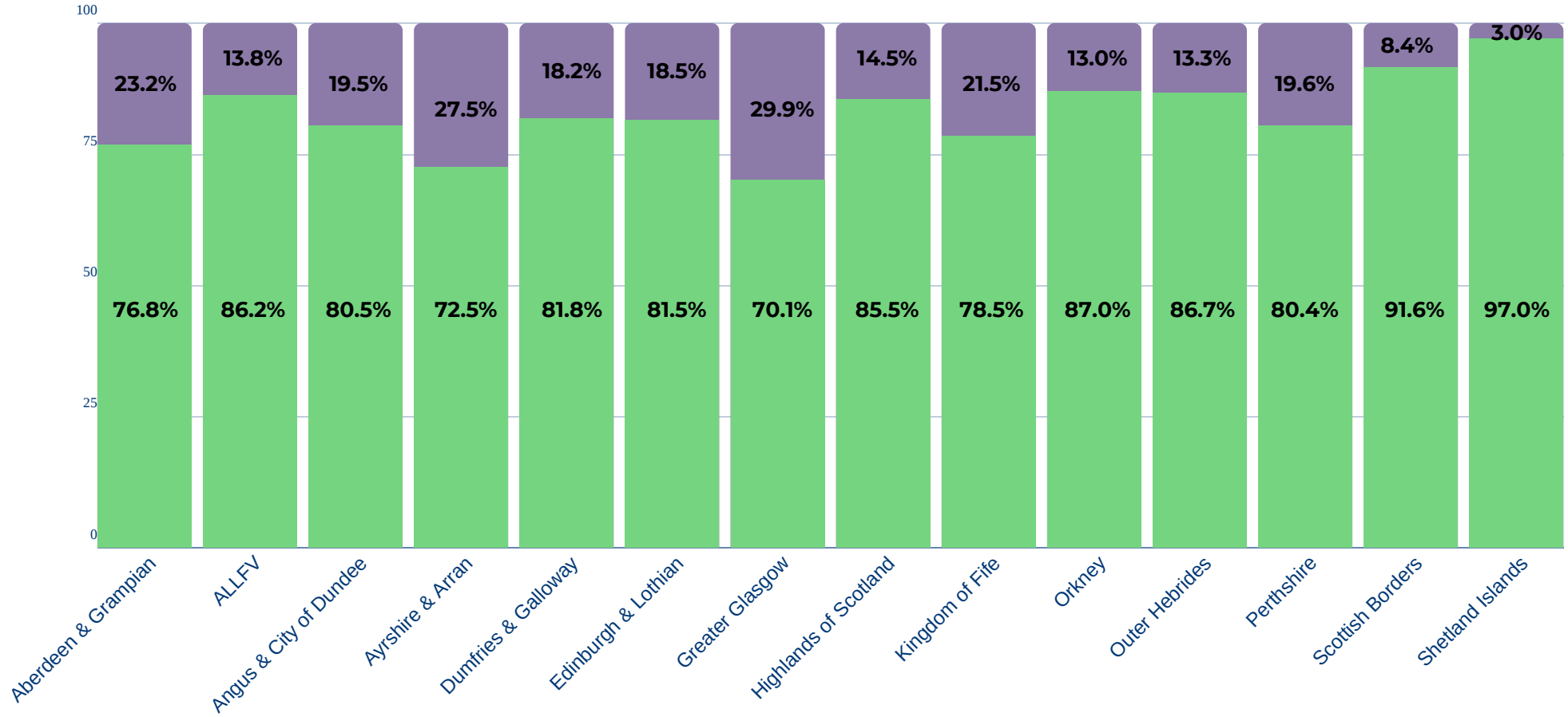
Category



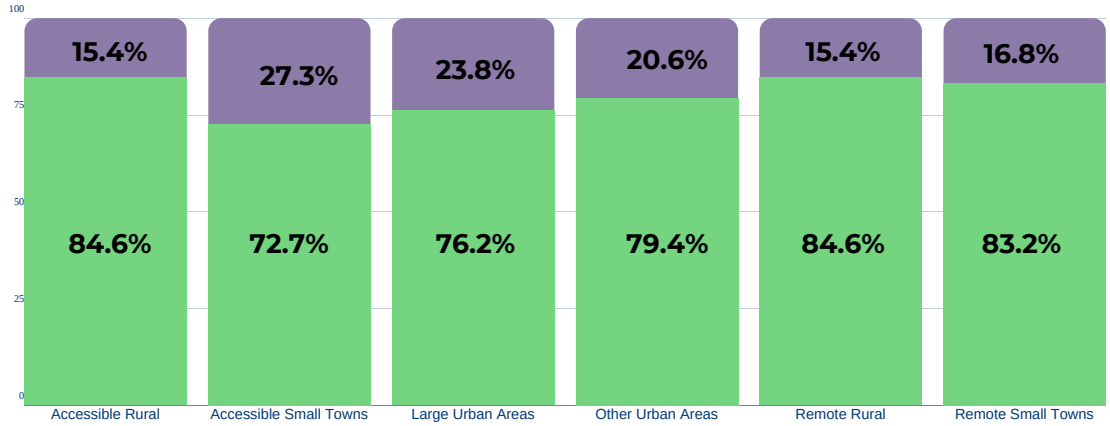
Geographic Location



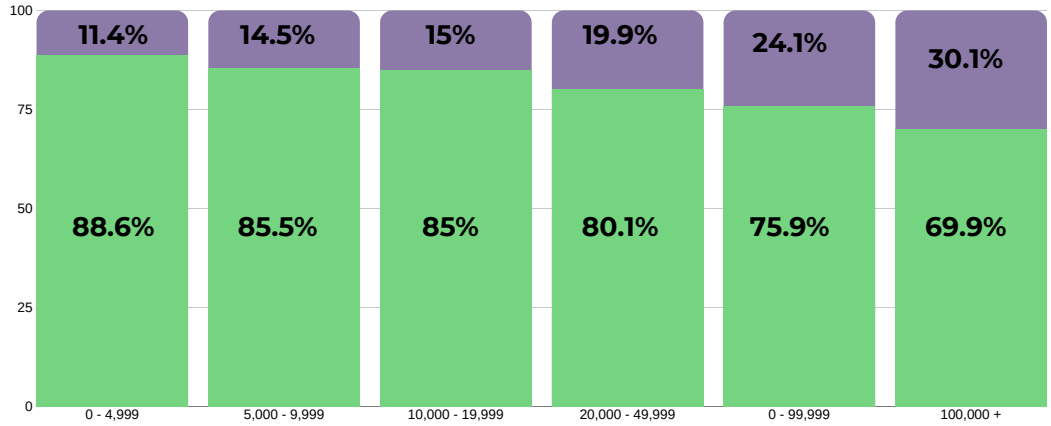
Former VisitScotland Area



Urban/ Rural



Volume of Visits

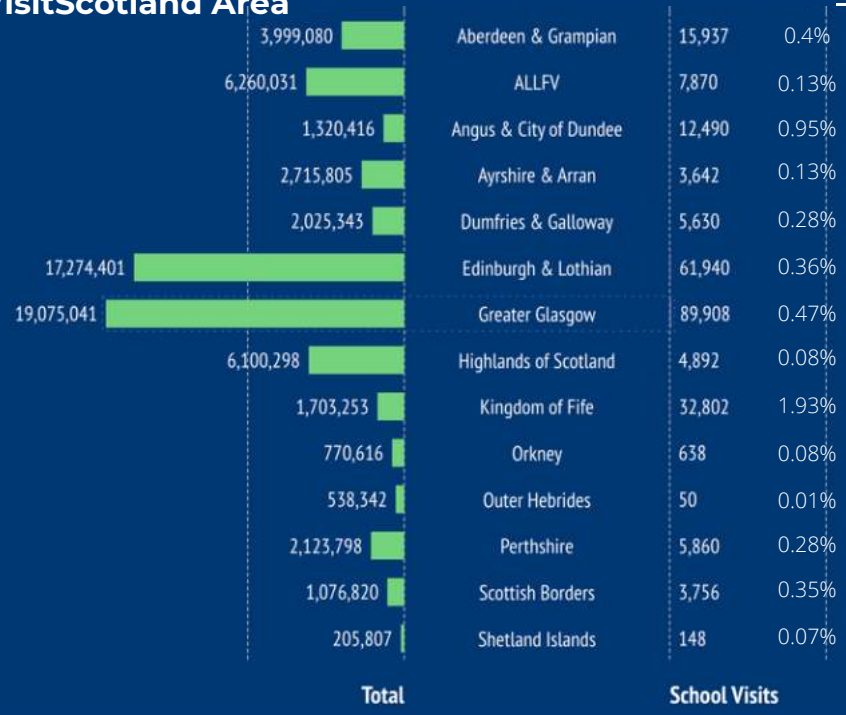


Adult Child

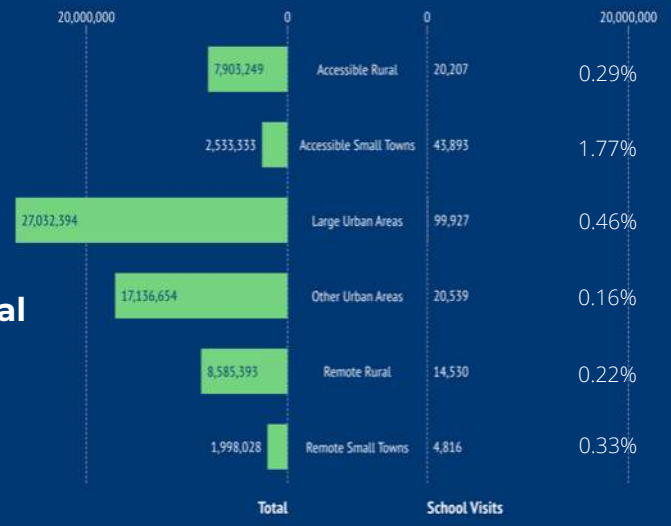
Figure 13 School Visits 2019 by: Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location

School Visits 2019

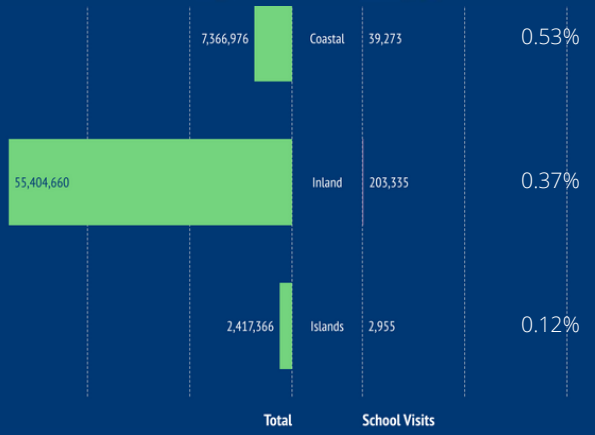
Former VisitScotland Area



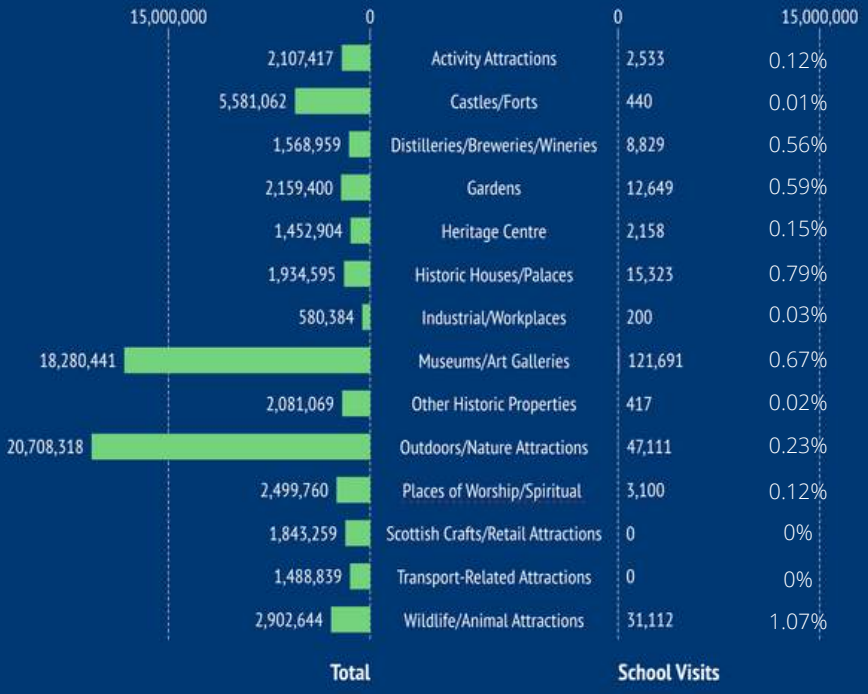
Urban/Rural



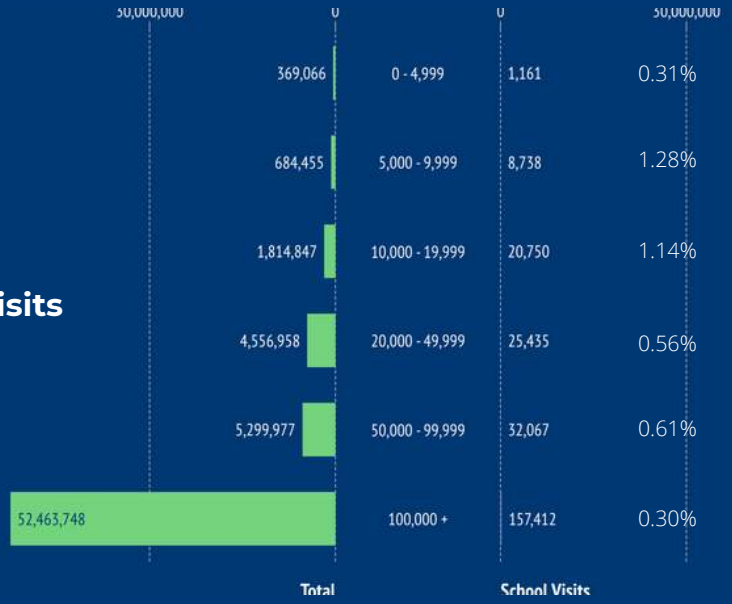
Geographic Location



Category



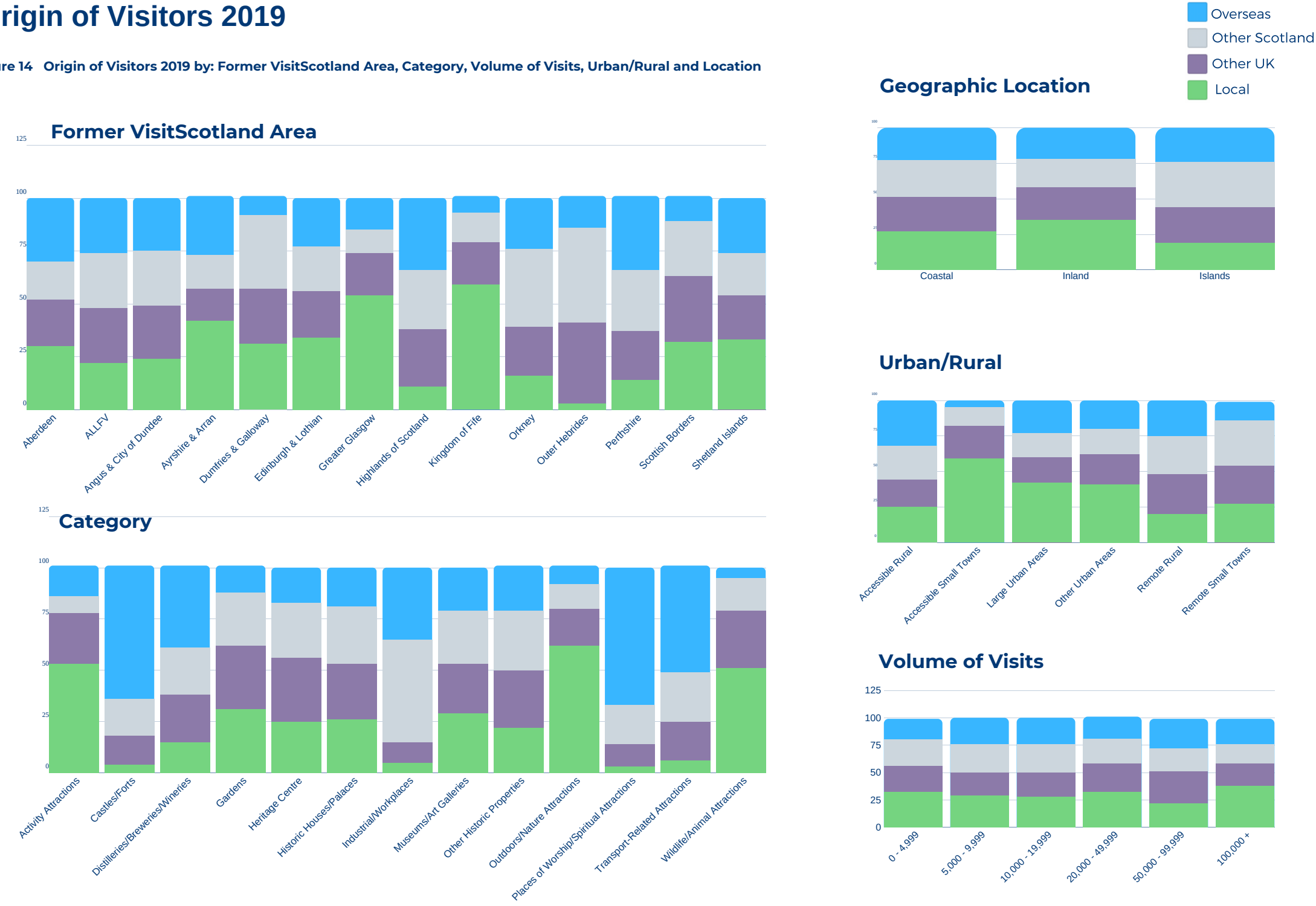
Volume of Visits



Total Visits School Visits

Origin of Visitors 2019

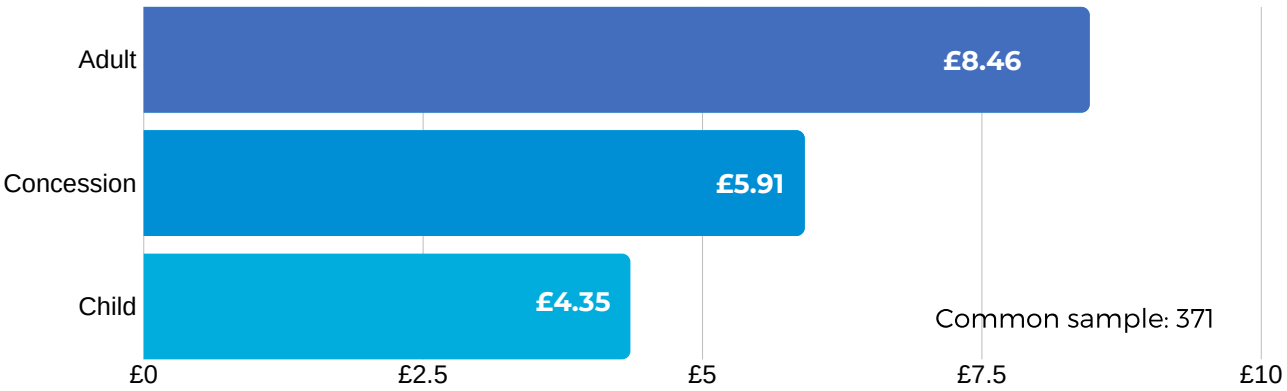
Figure 14 Origin of Visitors 2019 by: Former VisitScotland Area, Category, Volume of Visits, Urban/Rural and Location



Sample = 103

ADMISSIONS CHARGES 2019

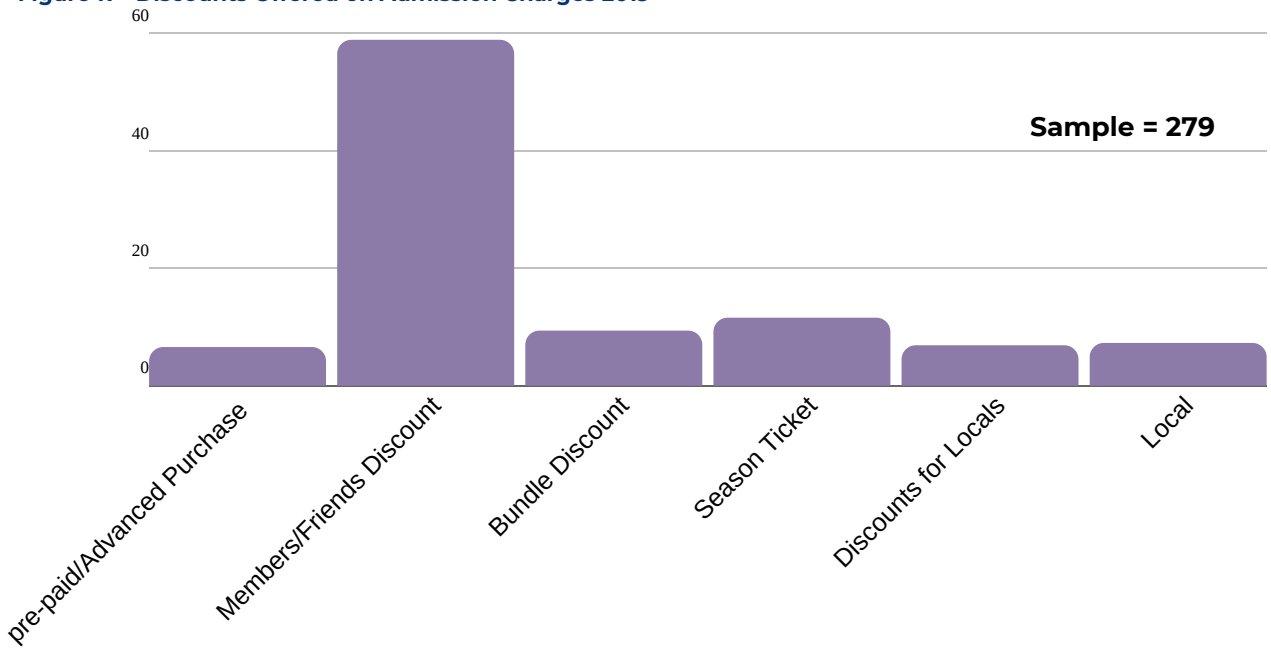
Figure 15 Average Admission Charges 2019



*Based on admission charge to the main element of the attraction. This does not include additional charges such as those for temporary exhibitions or special events.

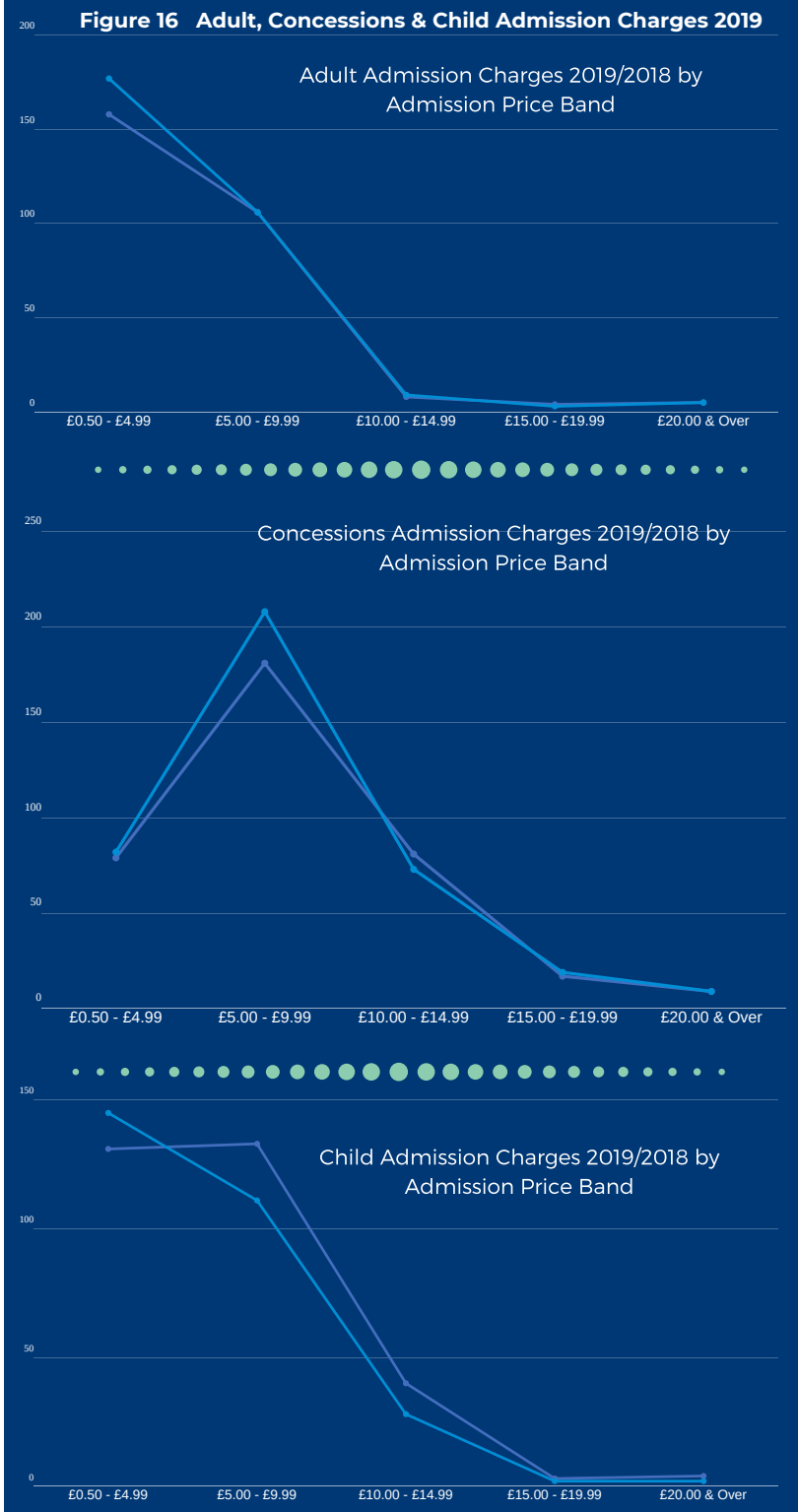
DISCOUNTS OFFERED ON ADMISSION CHARGES

Figure 17 Discounts Offered on Admission Charges 2019



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

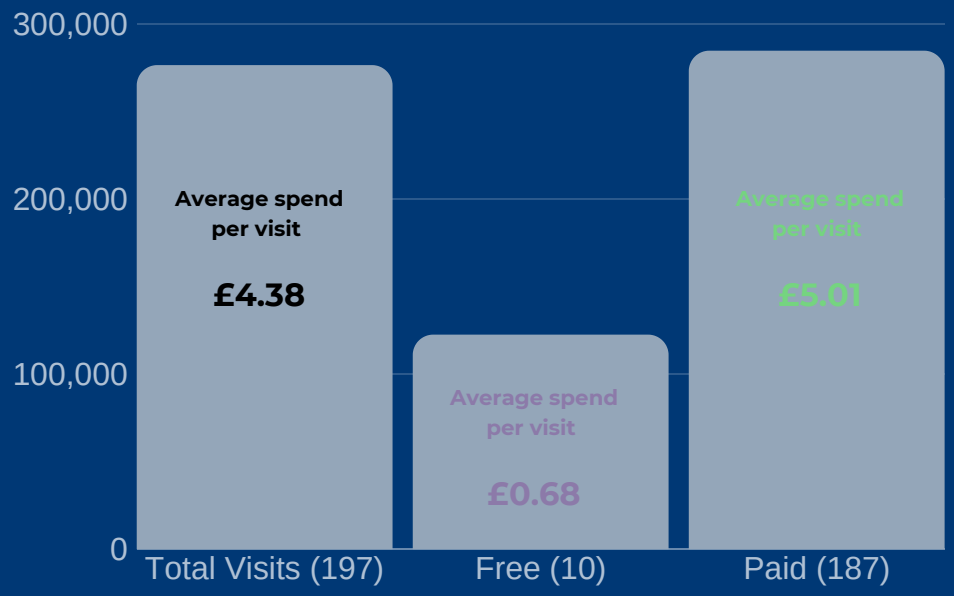
Figure 16 Adult, Concessions & Child Admission Charges 2019



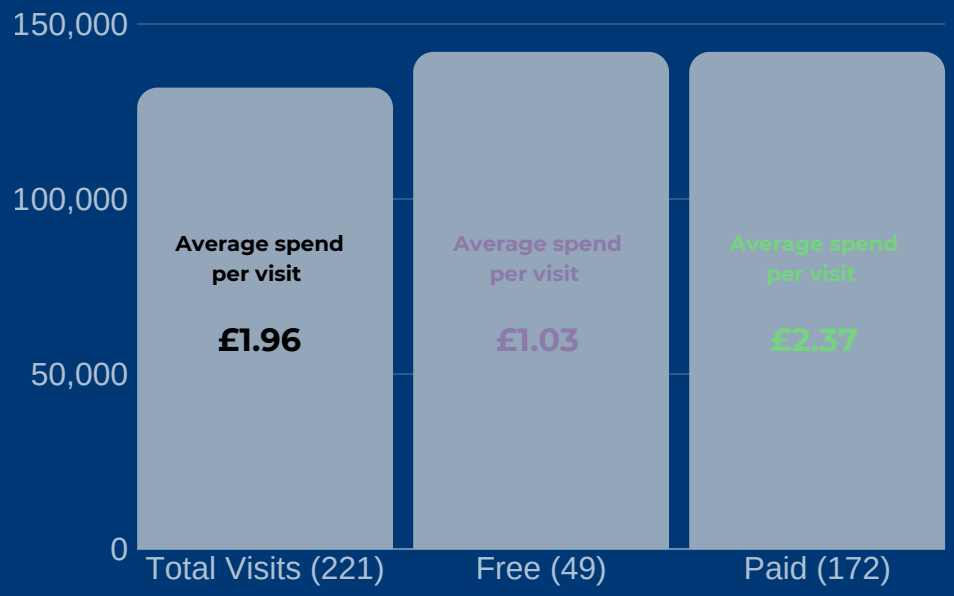
REVENUE 2019

Figure 18 Average Visitor Spends 2019

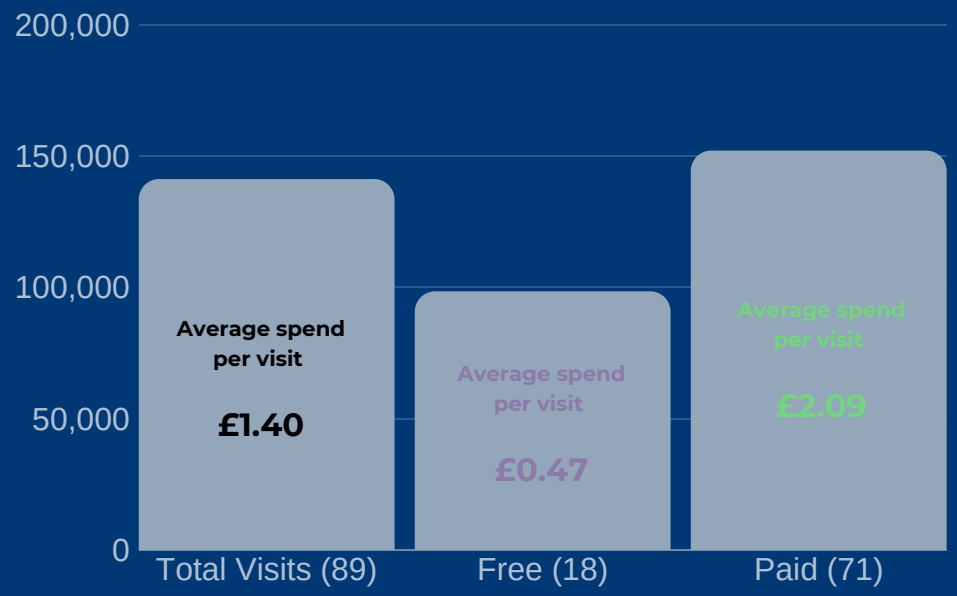
Average Visitor Spend on Admission



Average Visitor Spend on Retail



Average Visitor Spend on Catering



Revenue from Admissions 2019

Table 3 Average Visitor Spend on Admissions by Former VisitScotland Area, Volume of Visits, Category, Urban/Rural and Location

Category

Category	Sample	Total Spend	Total Visits 2019	Avg Admissions (£)	Avg Admissions Spend Per Visit (£)
Activity Attractions	2	£ 797,020.00	149970	£ 398,510.00	£ 5.31
Castles/Forts	45	£ 23,924,489.00	4951472	£ 531,655.31	£ 4.83
Distilleries/Breweries/Wineries	9	£ 1,211,569.00	142342	£ 134,618.78	£ 8.51
Gardens	17	£ 1,331,128.00	1378889	£ 78,301.65	£ 0.97
Heritage Centre	6	£ 1,510,850.00	582952	£ 251,808.33	£ 2.59
Historic Houses/Palaces	29	£ 11,479,203.00	1442992	£ 395,834.59	£ 7.96
Industrial/Workplaces	4	£ 87,584.00	49743	£ 21,896.00	£ 1.76
Museums/Art Galleries	31	£ 2,140,148.00	704008	£ 69,037.03	£ 3.04
Other Historic Properties	34	£ 2,430,627.00	1106168	£ 71,489.03	£ 2.20
Outdoors/Nature Attractions	5	£ 397,819.00	157362	£ 79,563.80	£ 2.53
Places of Worship/Spiritual Attractions	4	£ 48,370.00	634294	£ 12,092.50	£ 0.08
Transport-Related Attractions	2	£ 5,771,973.00	382802	£ 2,885,986.50	£ 15.08
Wildlife/Animal Attractions	9	£ 3,266,659.00	736995	£ 362,962.11	£ 4.43

Former VisitScotland Area

Vs Region	Sample	Total Spend	Total Visits 2019	Avg Admissions	Avg Admissions Spend Per Visit
Aberdeen & Grampian	27	£ 1,240,047.00	839493	£ 45,927.67	£ 1.48
ALLFV	31	£ 9,723,120.00	1723676	£ 313,649.03	£ 5.64
Angus & City of Dundee	14	£ 1,210,756.00	277360	£ 86,482.57	£ 4.37
Ayrshire & Arran	4	£ 680,012.00	664900	£ 170,003.00	£ 1.02
Dumfries & Galloway	17	£ 556,778.00	306012	£ 32,751.65	£ 1.82
Edinburgh & Lothian	24	£ 24,805,526.00	4471252	£ 1,033,563.58	£ 5.55
Greater Glasgow	13	£ 834,237.00	795222	£ 64,172.08	£ 1.05
Highlands of Scotland	18	£ 11,178,600.00	2073238	£ 621,033.33	£ 5.39
Kingdom of Fife	12	£ 1,298,169.00	420403	£ 108,180.75	£ 3.09
Orkney	6	£ 625,746.00	190877	£ 104,291.00	£ 3.28
Outer Hebrides	4	£ 77,368.00	26912	£ 19,342.00	£ 2.87
Perthshire	11	£ 1,569,778.00	393527	£ 142,707.09	£ 3.99
Scottish Borders	12	£ 549,555.00	209213	£ 45,796.25	£ 2.63
Shetland Islands	4	£ 47,747.00	27904	£ 11,936.75	£ 1.71

Urban/Rural

Urban Rural	Sample	Total Spend	Total Visits 2019	Avg Admissions	Avg Admissions Spend Per Visit
Accessible Rural	50	£ 8,627,631.00	1825243	£ 172,552.62	£ 4.73
Accessible Small Towns	10	£ 1,658,947.00	360763	£ 165,894.70	£ 4.60
Large Urban Areas	28	£ 24,634,461.00	4959773	£ 879,802.18	£ 4.97
Other Urban Areas	31	£ 9,994,953.00	2263428	£ 322,417.84	£ 4.42
Remote Rural	68	£ 8,546,468.00	2821325	£ 125,683.35	£ 3.03
Remote Small Towns	10	£ 934,979.00	189457	£ 93,497.90	£ 4.94

Volume of Visits

Volume Visits	Sample	Total Spend	Total Visits 2019	Avg Admissions	Avg Admissions Spend Per Visit
0 - 4,999	43	£ 311,361.00	97686	£ 7,240.95	£ 3.19
5,000 - 9,999	29	£ 472,115.00	250587	£ 16,279.83	£ 1.88
10,000 - 19,999	41	£ 1,597,120.00	674130	£ 38,954.15	£ 2.37
20,000 - 49,999	36	£ 3,682,500.00	1305052	£ 102,291.67	£ 2.82
50,000 - 99,999	25	£ 5,705,906.00	1672359	£ 228,236.24	£ 3.41
100,000 +	23	£ 42,628,437.00	8420175	£ 1,853,410.30	£ 5.06

Geographic Location

Location	Sample	Total Spend	Total Visits 2019	Avg Admissions	Avg Admissions Spend Per Visit
Coastal	52	£ 7,206,842.00	2960502	£ 138,593.12	£ 2.43
Inland	125	£ 45,640,474.00	9019044	£ 365,123.79	£ 5.06
Islands	20	£ 1,550,123.00	440443	£ 77,506.15	£ 3.52

Revenue from Retail 2019

Table 4 Average Visitor Spend on Retail by Former VisitScotland Area, Volume of Visits, Category, Urban/Rural and Location

Category

Category	Sample	Total Spend	Total Visits 2019	Avg Retail	Avg Retail Spend Per Visit
Activity Attractions	3	£ 199,038.00	192616	£ 66,346.00	£ 1.03
Castles/Forts	44	£ 10,535,358.00	4951304	£ 239,439.95	£ 2.13
Distilleries/Breweries/Wineries	9	£ 2,450,150.00	142342	£ 272,238.89	£ 17.21
Gardens	12	£ 1,978,108.00	1302011	£ 164,842.33	£ 1.52
Heritage Centre	8	£ 2,381,677.00	588682	£ 297,709.63	£ 4.05
Historic Houses/Palaces	30	£ 3,582,190.00	1339667	£ 119,406.33	£ 2.67
Industrial/Workplaces	5	£ 1,064,324.00	68526	£ 212,864.80	£ 15.53
Museums/Art Galleries	56	£ 1,247,280.00	1346555	£ 22,272.86	£ 0.93
Other Historic Properties	32	£ 2,231,607.00	1105996	£ 69,737.72	£ 2.02
Outdoors/Nature Attractions	7	£ 1,196,539.00	2086354	£ 170,934.14	£ 0.57
Places of Worship/Spiritual Attractions	4	£ 198,025.00	634294	£ 49,506.25	£ 0.31
Transport-Related Attractions	2	£ 369,621.00	382802	£ 184,810.50	£ 0.97
Wildlife/Animal Attractions	9	£ 1,659,016.00	736995	£ 184,335.11	£ 2.25

Former VisitScotland Area

Region	Sample	Total Spend	Total Visits 2019	Avg Retail	Avg Retail Spend Per Visit
Aberdeen & Grampian	31	£ 1,423,372.00	994359	£ 45,915.23	£ 1.43
ALLFV	29	£ 4,917,706.00	1658993	£ 169,576.07	£ 2.96
Angus & City of Dundee	13	£ 457,971.00	275048	£ 35,228.54	£ 1.67
Ayrshire & Arran	7	£ 676,694.00	2034255	£ 96,670.57	£ 0.33
Dumfries & Galloway	20	£ 386,503.00	384334	£ 19,325.15	£ 1.01
Edinburgh & Lothian	24	£ 9,602,417.00	4393684	£ 400,100.71	£ 2.19
Greater Glasgow	15	£ 1,141,919.00	934629	£ 76,127.93	£ 1.22
Highlands of Scotland	24	£ 7,256,747.00	2607554	£ 302,364.46	£ 2.78
Kingdom of Fife	13	£ 1,086,239.00	427426	£ 83,556.85	£ 2.54
Orkney	11	£ 622,495.00	299290	£ 56,590.45	£ 2.08
Outer Hebrides	3	£ 44,337.00	21899	£ 14,779.00	£ 2.02
Perthshire	14	£ 1,095,867.00	548964	£ 78,276.21	£ 2.00
Scottish Borders	13	£ 312,180.00	264571	£ 24,013.85	£ 1.18
Shetland Islands	4	£ 68,486.00	33138	£ 17,121.50	£ 2.07

Urban/Rural

Urban Rural	Sample	Total Spend	Total Visits 2019	Avg Retail	Avg Retail Spend Per Visit
Accessible Rural	51	£ 3,307,558.00	1857952	£ 64,854.08	£ 1.78
Accessible Small Towns	15	£ 754,851.00	435212	£ 50,323.40	£ 1.73
Large Urban Areas	28	£ 10,319,309.00	4912462	£ 368,546.75	£ 2.10
Other Urban Areas	40	£ 6,560,934.00	3980659	£ 164,023.35	£ 1.65
Remote Rural	74	£ 7,280,656.00	3436406	£ 98,387.24	£ 2.12
Remote Small Towns	13	£ 869,625.00	255453	£ 66,894.23	£ 3.40

Volume of Visits

Volume Visits	Sample	Total Spend	Total Visits 2019	Avg Retail	Avg Retail Spend Per Visit
0 - 4,999	43	£ 392,296.00	104158	£ 9,123.16	£ 3.77
5,000 - 9,999	34	£ 374,696.00	286790	£ 11,020.47	£ 1.31
10,000 - 19,999	49	£ 3,600,179.00	780922	£ 73,473.04	£ 4.61
20,000 - 49,999	43	£ 2,704,114.00	1567226	£ 62,886.37	£ 1.73
50,000 - 99,999	25	£ 3,060,731.00	1663853	£ 122,429.24	£ 1.84
100,000 +	27	£ 18,960,917.00	10475195	£ 702,256.19	£ 1.81

Geographic Location

Location	Sample	Total Spend	Total Visits 2019	Avg Retail	Avg Retail Spend Per Visit
Coastal	58	£ 4,867,500.00	3069717	£ 83,922.41	£ 1.59
Inland	137	£ 22,145,913.00	11237015	£ 161,649.00	£ 1.97
Islands	26	£ 2,079,520.00	571412	£ 79,981.54	£ 3.64

Revenue from Catering 2019

Table 5 Average Visitor Spend on Catering by Former VisitScotland Area, Volume of Visits, Category, Urban/Rural and Location

Category

Category	Sample	Total Spend	Total Visits 2019	Avg Catering	Avg Catering Spend Per Visit
Activity Attractions	3	£ 965,211.00	192616	£ 321,737.00	£ 5.01
Castles/Forts	10	£ 1,633,682.00	827731	£ 163,368.20	£ 1.97
Distilleries/Breweries/Wineries	2	£ 236,847.00	46756	£ 118,423.50	£ 5.07
Gardens	14	£ 1,110,528.00	1358172	£ 79,323.43	£ 0.82
Heritage Centre	6	£ 1,204,218.00	519814	£ 200,703.00	£ 2.32
Historic Houses/Palaces	17	£ 2,622,698.00	1178198	£ 154,276.35	£ 2.23
Industrial/Workplaces	3	£ 116,402.00	64210	£ 38,800.67	£ 1.81
Museums/Art Galleries	16	£ 564,186.00	534743	£ 35,261.63	£ 1.06
Other Historic Properties	4	£ 588,112.00	612281	£ 147,028.00	£ 0.96
Outdoors/Nature Attractions	7	£ 1,360,625.00	2624154	£ 194,375.00	£ 0.52
Transport-Related Attractions	2	£ 743,372.00	382802	£ 371,686.00	£ 1.94
Wildlife/Animal Attractions	5	£ 1,399,532.00	599427	£ 279,906.40	£ 2.33

Former VisitScotland Area

Vs Region	Sample	Total Spend	Total Visits 2019	Avg Catering	Avg Catering Spend Per Visit
Aberdeen & Grampian	14	£ 1,150,207.00	689757	£ 82,157.64	£ 1.67
ALLFV	15	£ 1,689,955.00	1214004	£ 112,663.67	£ 1.39
Angus & City of Dundee	7	£ 176,473.00	223315	£ 25,210.43	£ 0.79
Ayrshire & Arran	6	£ 1,532,921.00	2033026	£ 255,486.83	£ 0.75
Dumfries & Galloway	5	£ 554,996.00	208140	£ 110,999.20	£ 2.67
Edinburgh & Lothian	7	£ 2,316,058.00	1839538	£ 330,865.43	£ 1.26
Greater Glasgow	4	£ 313,326.00	120930	£ 78,331.50	£ 2.59
Highlands of Scotland	11	£ 3,177,156.00	1837976	£ 288,832.36	£ 1.73
Kingdom of Fife	6	£ 548,135.00	185020	£ 91,355.83	£ 2.96
Perthshire	7	£ 1,022,511.00	497372	£ 146,073.00	£ 2.06
Scottish Borders	4	£ 54,484.00	81127	£ 13,621.00	£ 0.67
Shetland Islands	3	£ 9,191.00	10699	£ 3,063.67	£ 0.86

Urban/Rural

Urban Rural	Sample	Total Spend	Total Visits 2019	Avg Catering	Avg Catering Spend Per Visit
Accessible Rural	20	£ 2,579,436.00	1261552	£ 128,971.80	£ 2.04
Accessible Small Towns	4	£ 666,736.00	246181	£ 166,684.00	£ 2.71
Large Urban Areas	14	£ 1,925,992.00	1923715	£ 137,570.86	£ 1.00
Other Urban Areas	16	£ 3,456,041.00	3175174	£ 216,002.56	£ 1.09
Remote Rural	34	£ 3,865,208.00	2322523	£ 113,682.59	£ 1.66
Remote Small Towns	1	£ 52,000.00	11759	£ 52,000.00	£ 4.42

Volume of Visits

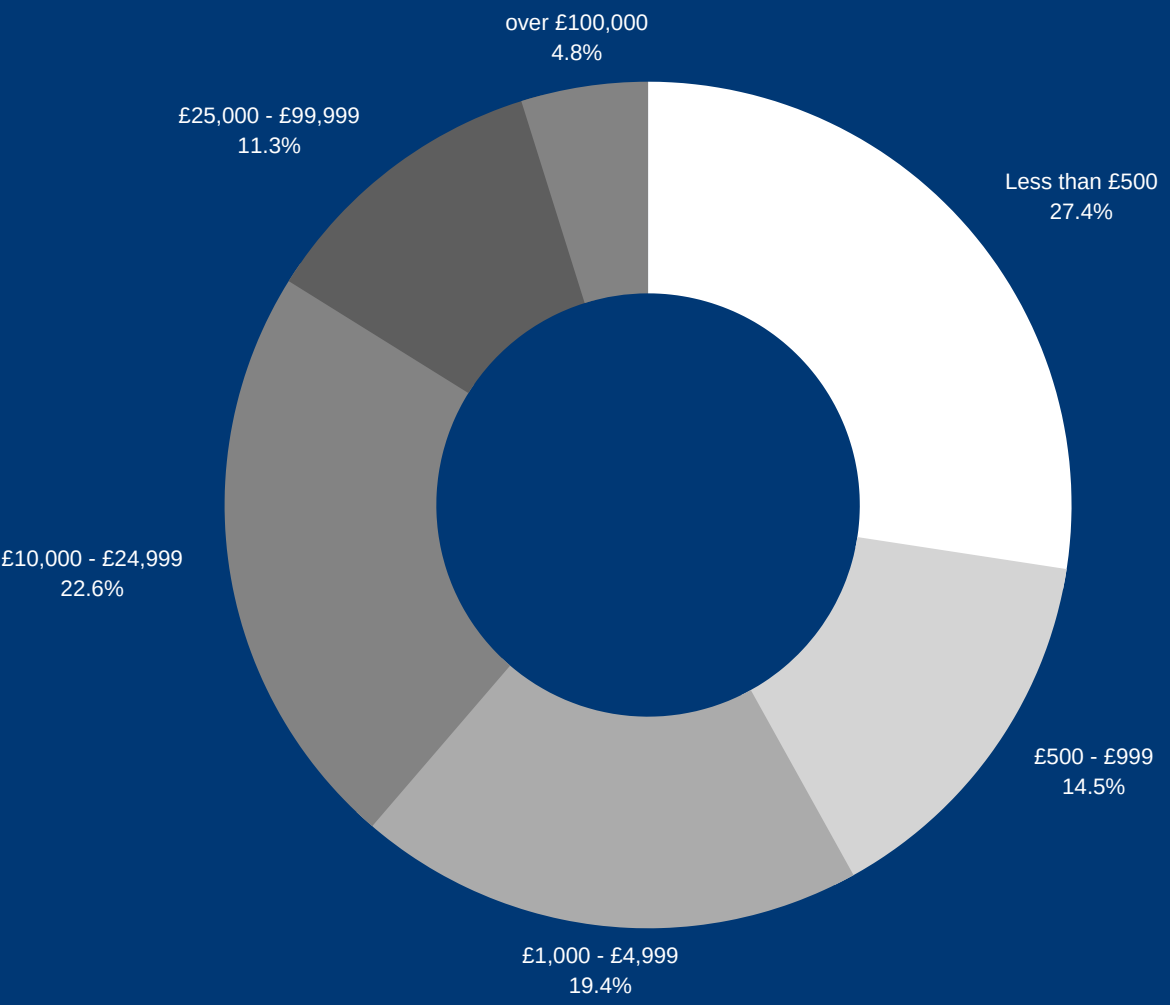
Volume Visits	Sample	Total Spend	Total Visits 2019	Avg Catering	Avg Catering Spend Per Visit
0 - 4,999	11	£ 32,923.00	27814	£ 2,993.00	£ 1.18
5,000 - 9,999	9	£ 202,424.00	125396	£ 22,491.56	£ 1.61
10,000 - 19,999	14	£ 973,520.00	231447	£ 69,537.14	£ 4.21
20,000 - 49,999	17	£ 1,309,947.00	654659	£ 77,055.71	£ 2.00
50,000 - 99,999	18	£ 2,053,120.00	1218511	£ 114,062.22	£ 1.68
100,000 +	20	£ 7,973,479.00	6683077	£ 398,673.95	£ 1.19

Geographic Location

Location	Sample	Total Spend	Total Visits 2019	Avg Catering	Avg Catering Spend Per Visit
Coastal	22	£ 3,000,179.00	2295442	£ 136,371.77	£ 1.31
Inland	59	£ 9,132,232.00	6497580	£ 154,783.59	£ 1.41
Islands	8	£ 413,002.00	147882	£ 51,625.25	£ 2.79

Range of Marketing Budgets 2019 – All Responding Attractions

Figure 19 Range of Marketing Budgets 2019 – All Responding Attractions

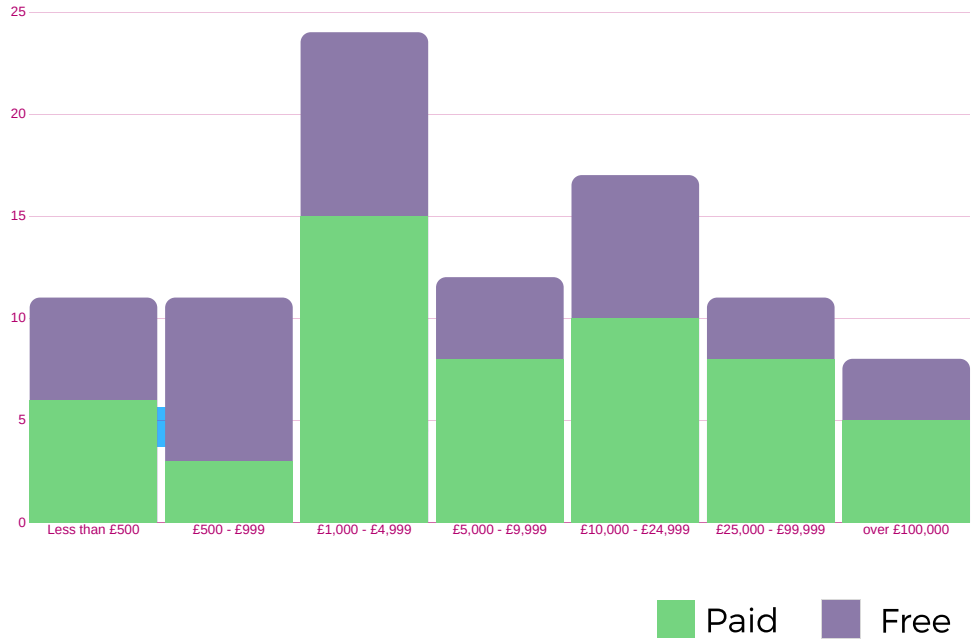


Just over 47% of attraction operators have a marketing budget of under £5,000; and just over a fifth of the operators have a marketing budget of between £10,000 and £24,999.

RANGE OF MARKETING BUDGETS BY ADMISSION 2019

66 attraction operators provided us with their marketing budget for 2019; these are divided into budget ranges in the graph below.

Figure 20 Range of Marketing Budgets by Admission 2019



Paid admission attractions tend to have higher marketing budgets than **Free admission attractions.**

Figure 21 Range of Marketing Activities Undertaken in 2019

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

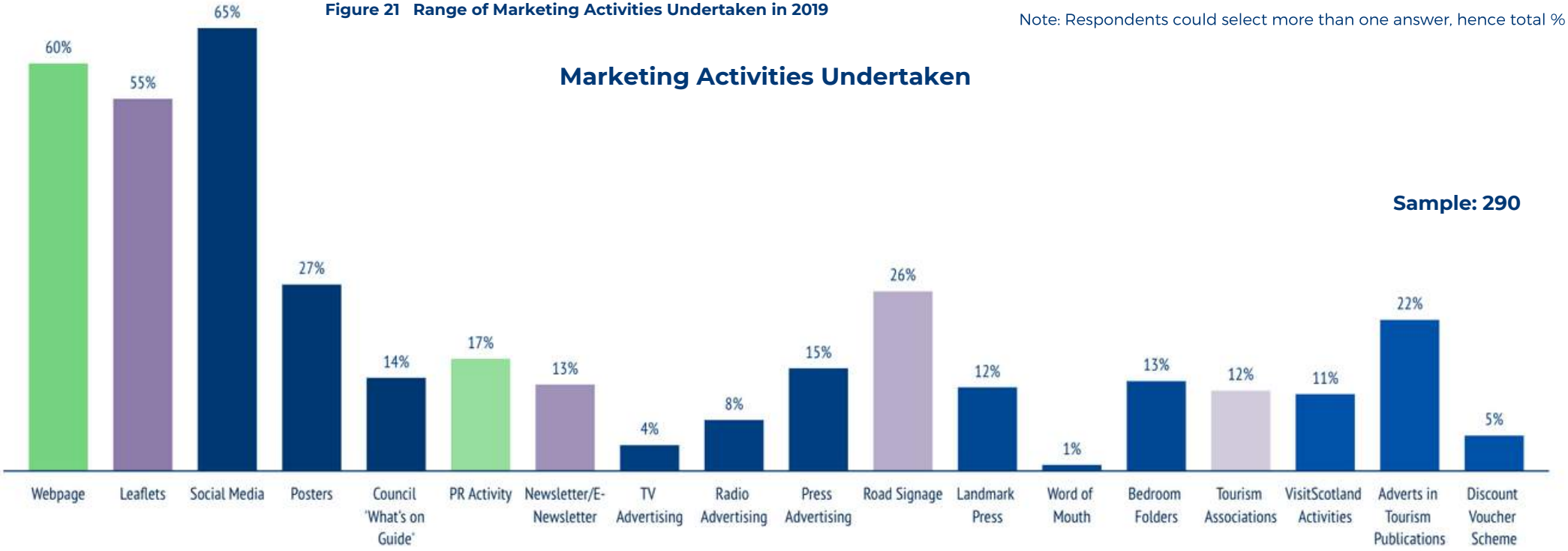


Figure 22 Most Effective Marketing Activities in 2019

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

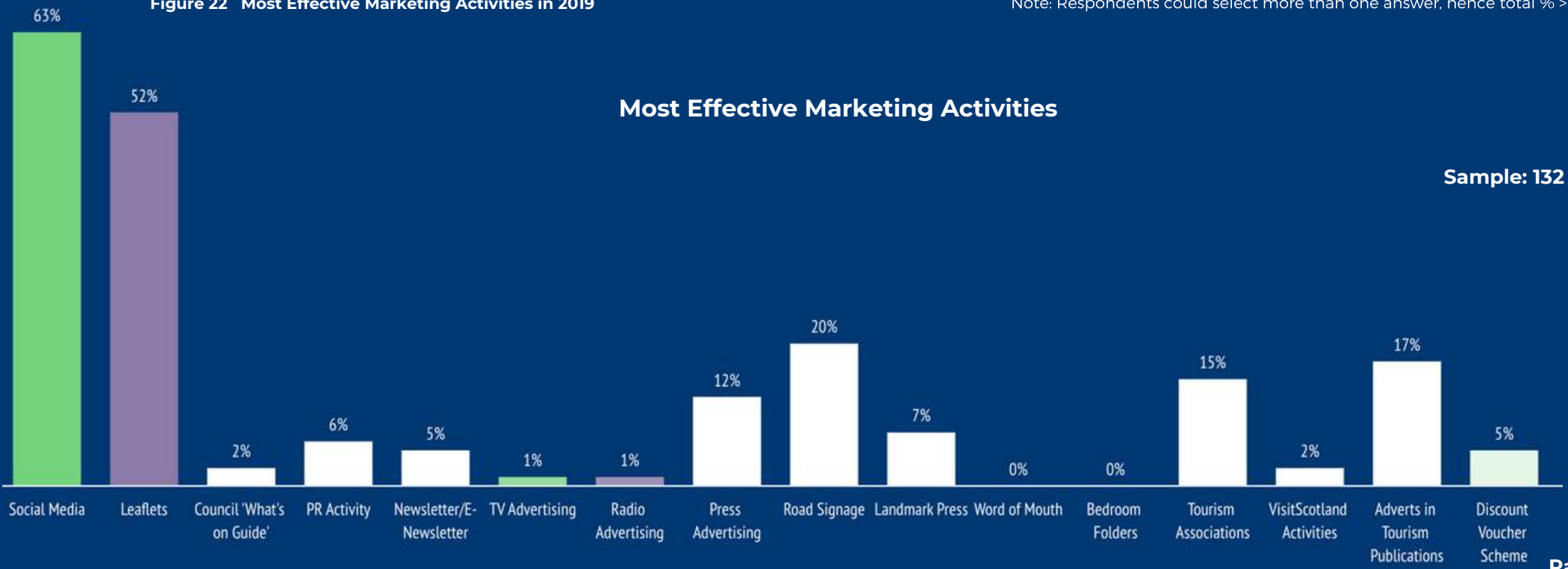
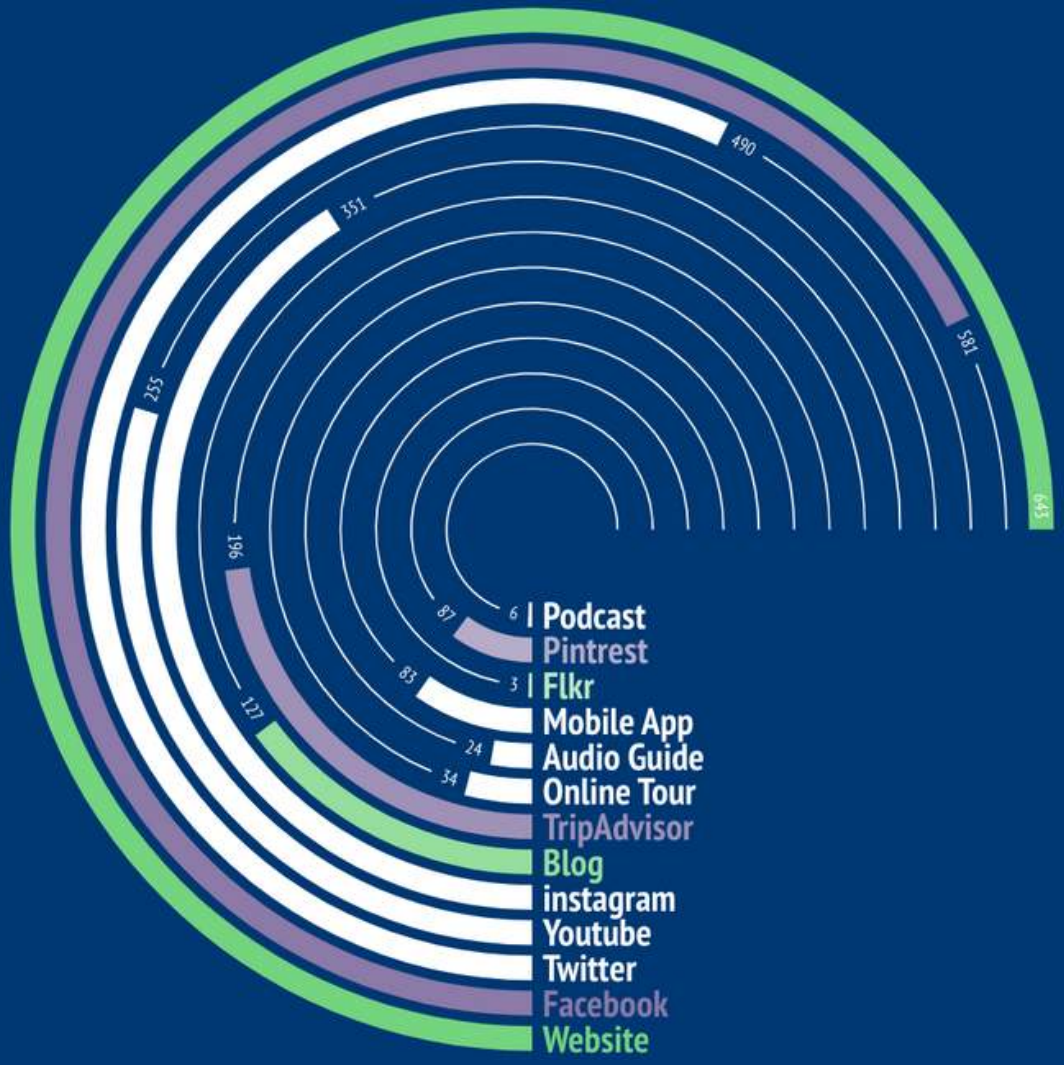


Figure 23 Web Presence 2019



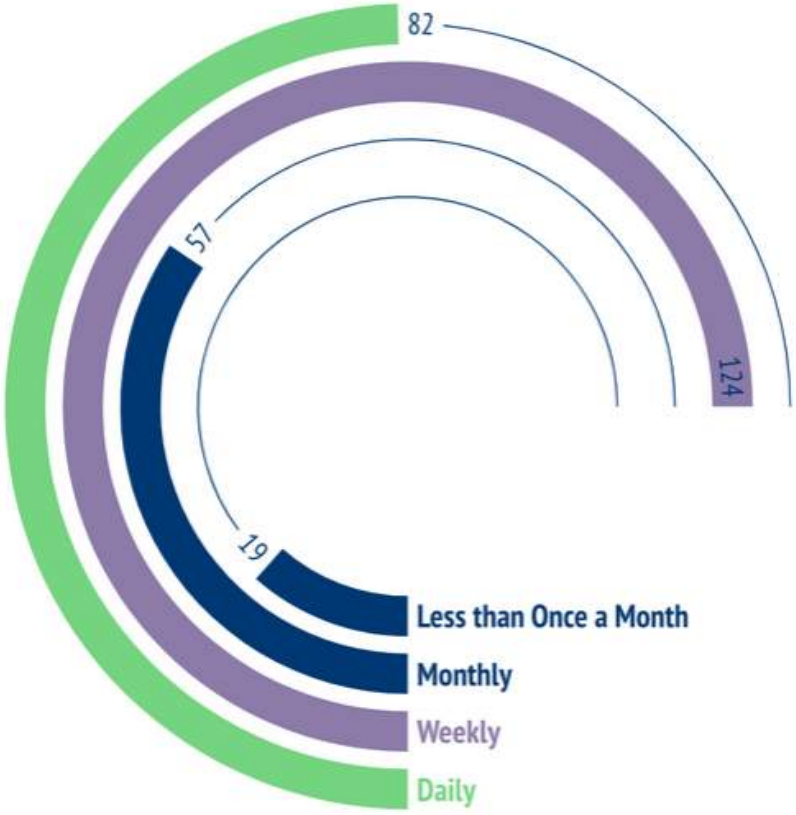
Some 651 attraction operators indicated whether or not they had a website or a web page and/or social media presence in 2019.

Almost all responding attractions have a social media presence, with either their own social media site, or presence on a Local Authority, local area, umbrella organisation or VisitScotland Website.

Web & Social Media Frequency of Updates 2019

Some 290 attraction operators indicated how often they updated their web and social media pages. The results are detailed in the graph below:

Figure 24 Web & Social Media Frequency of Updates 2019



Over a quarter of respondents update their web and social media pages on a daily basis, whilst over a quarter of the respondents update them monthly or less.

HUMAN RESOURCES 2019

Figure 25 Employment in 2019 by Attraction Category

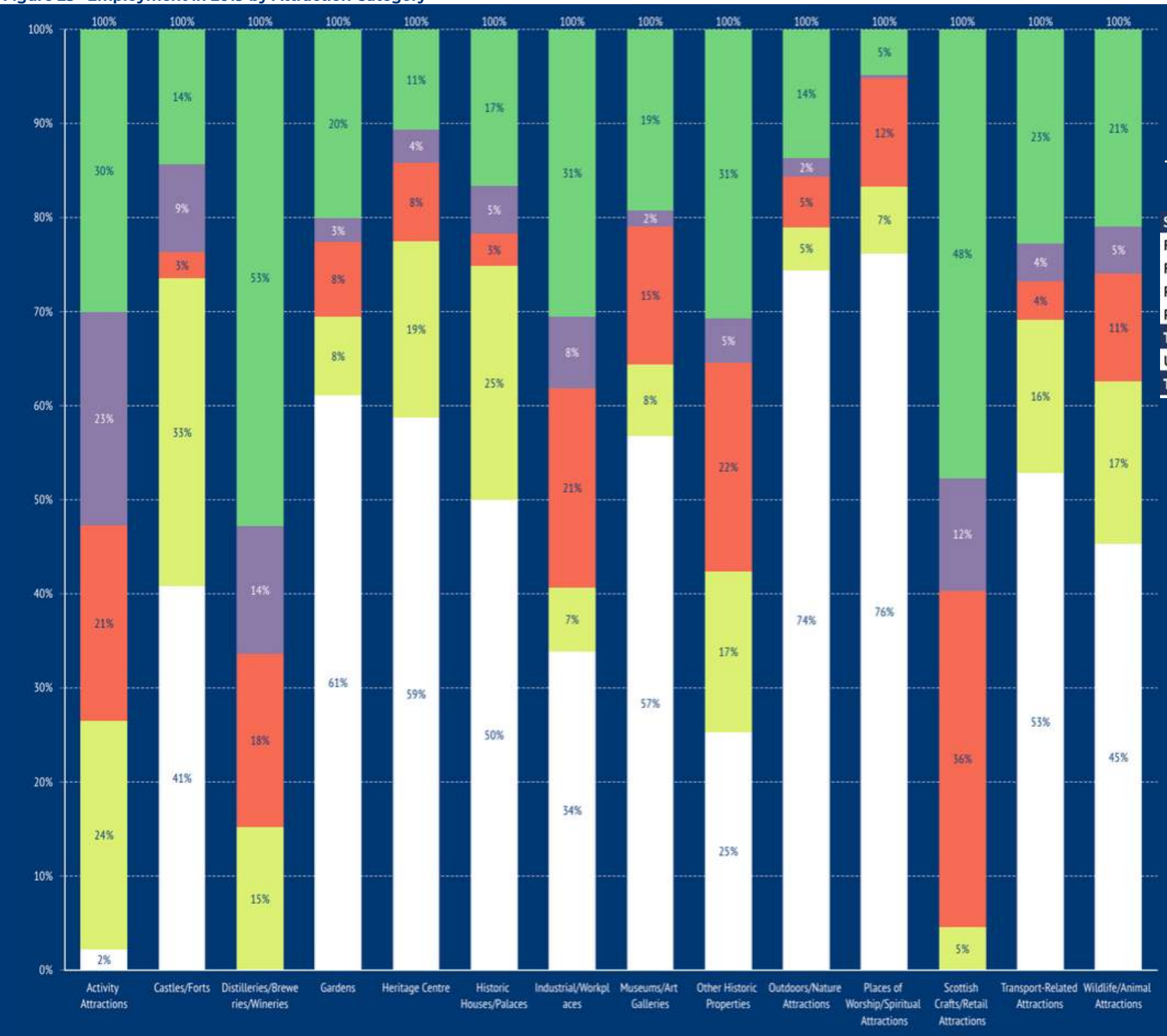
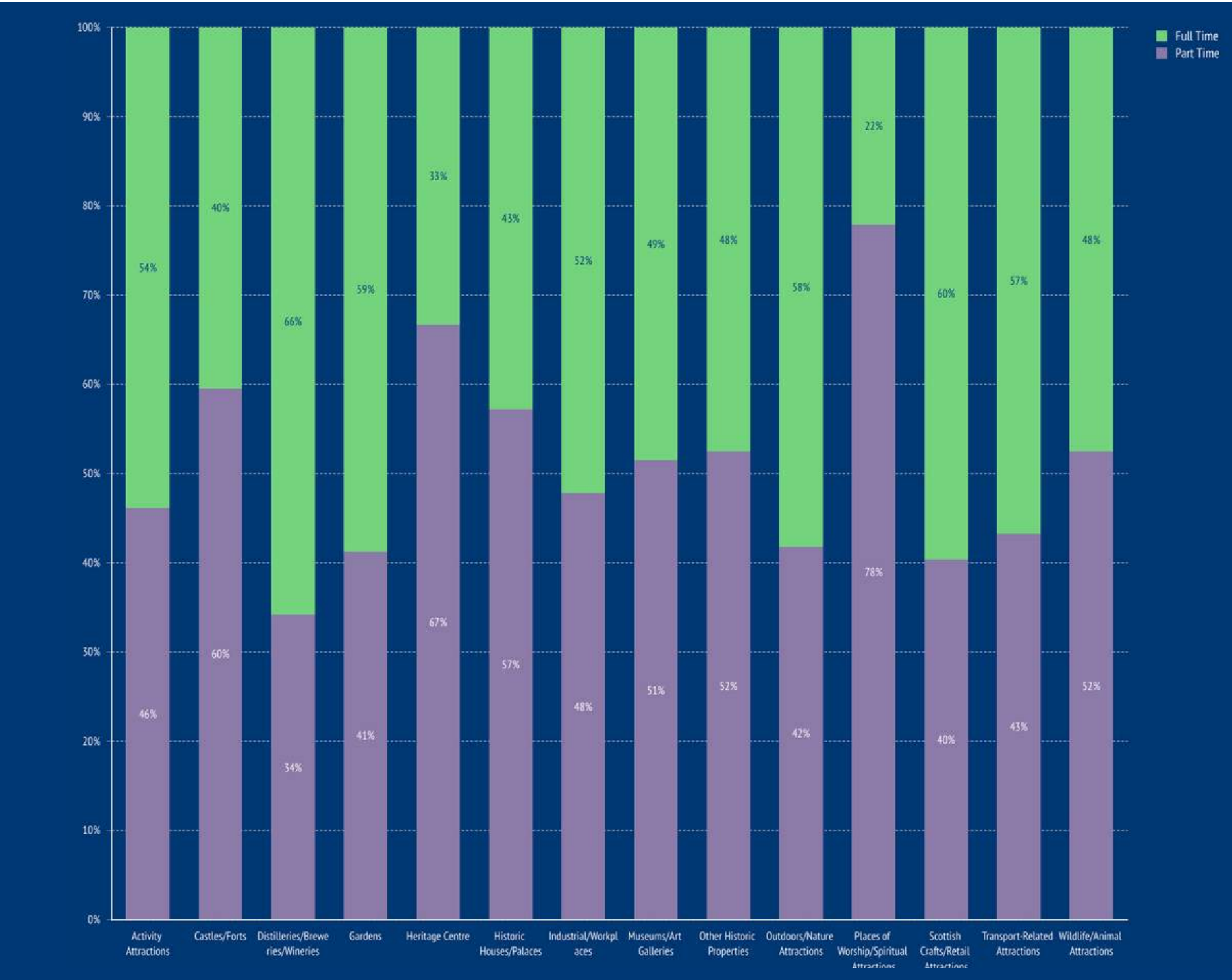


Table 6 Employment in Visitor Attractions for 2019

Sample	515
Full Time Permanent	3470
Full Time Seasonal	767
Part Time Permanent	1864
Part Time Seasonal	2269
Total Paid Workforce	8370
Unpaid Volunteer	8742
Total Workforce	17112

Employment in Visitor Attraction shows that Unpaid Volunteers represent just Over 50% of the workforce for 2019.

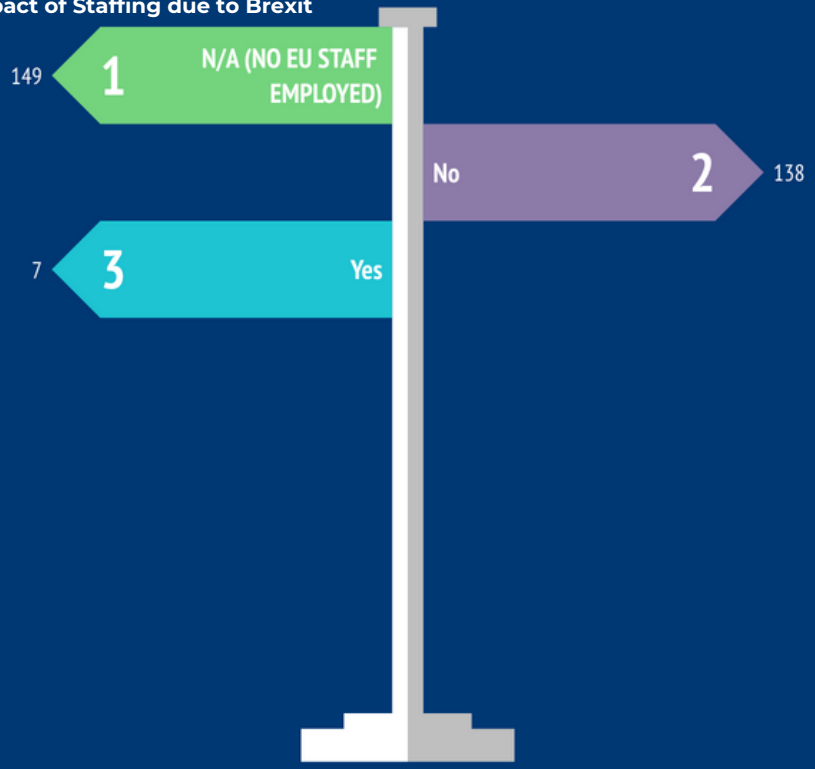
Figure 26 Employment in 2017 by Full Time/Part Time and Attraction Category



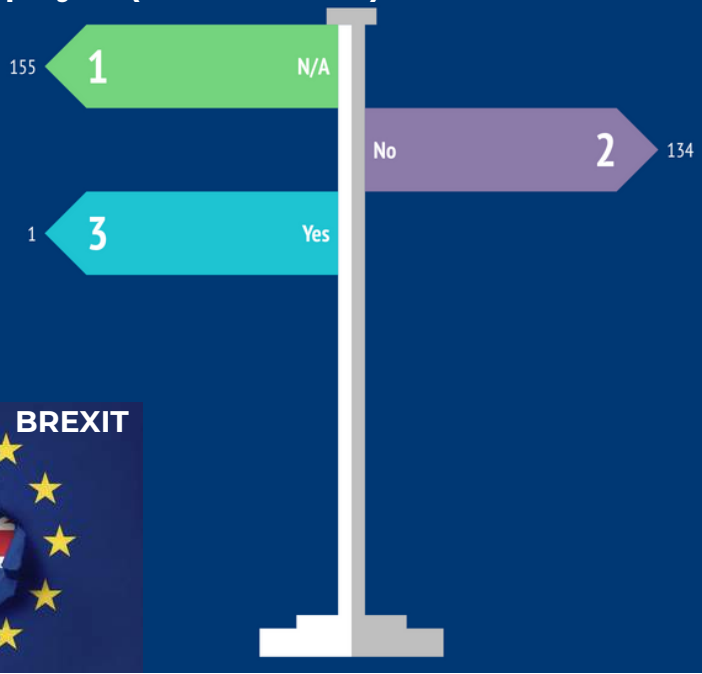
Additional Analysis 2019

Impact of Employed (EU) staff due to Brexit

Figure 27 Impact of Staffing due to Brexit



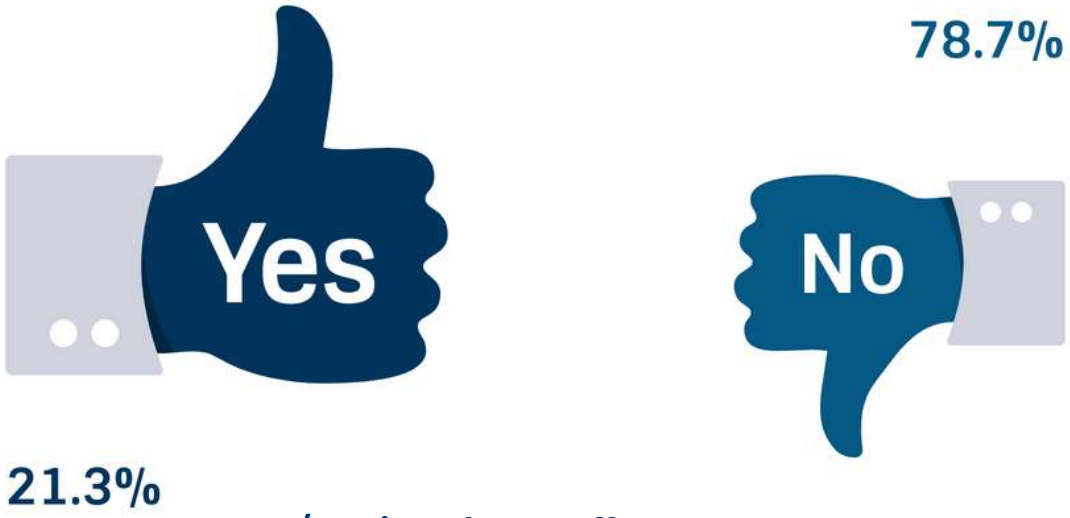
Impact of Employed (Rest of World) staff due to Brexit



TV/Movie Industry impact

Did the TV/Movies Industry Impact Visitor Numbers

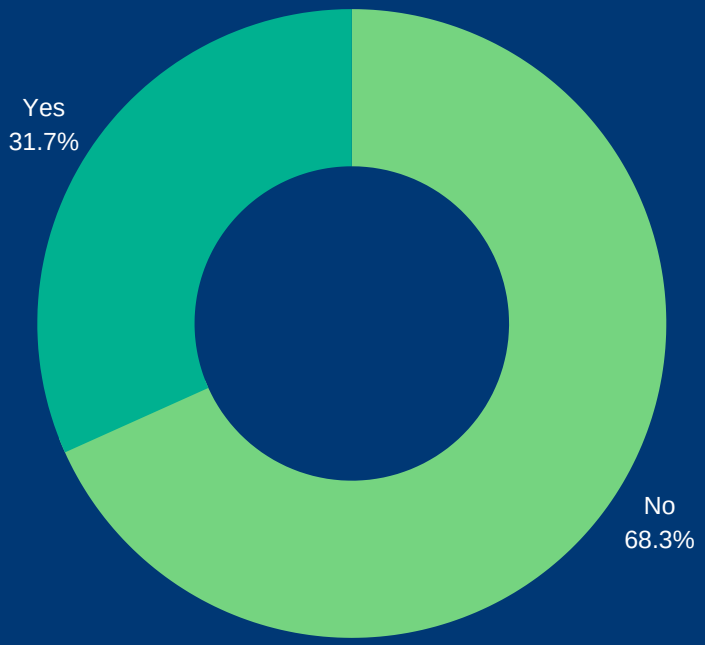
Figure 28 TV/Movie Industry Impact/Factors



TV/Movie Industry Effect Factors

Green Tourism Award

Figure 29 Green Tourism Award



Attraction Green Tourism Award By Rating

Attractions within VisitScotland Quality Assurance Scheme

Figure 30 VisitScotland Quality Assurance Scheme

Sample	Attractions star rating
6	★★☆☆☆
76	★★★☆☆
210	★★★★☆
91	★★★★★

Figure 31 Positive/Negative Factors

Factors Affecting Visitation 2019

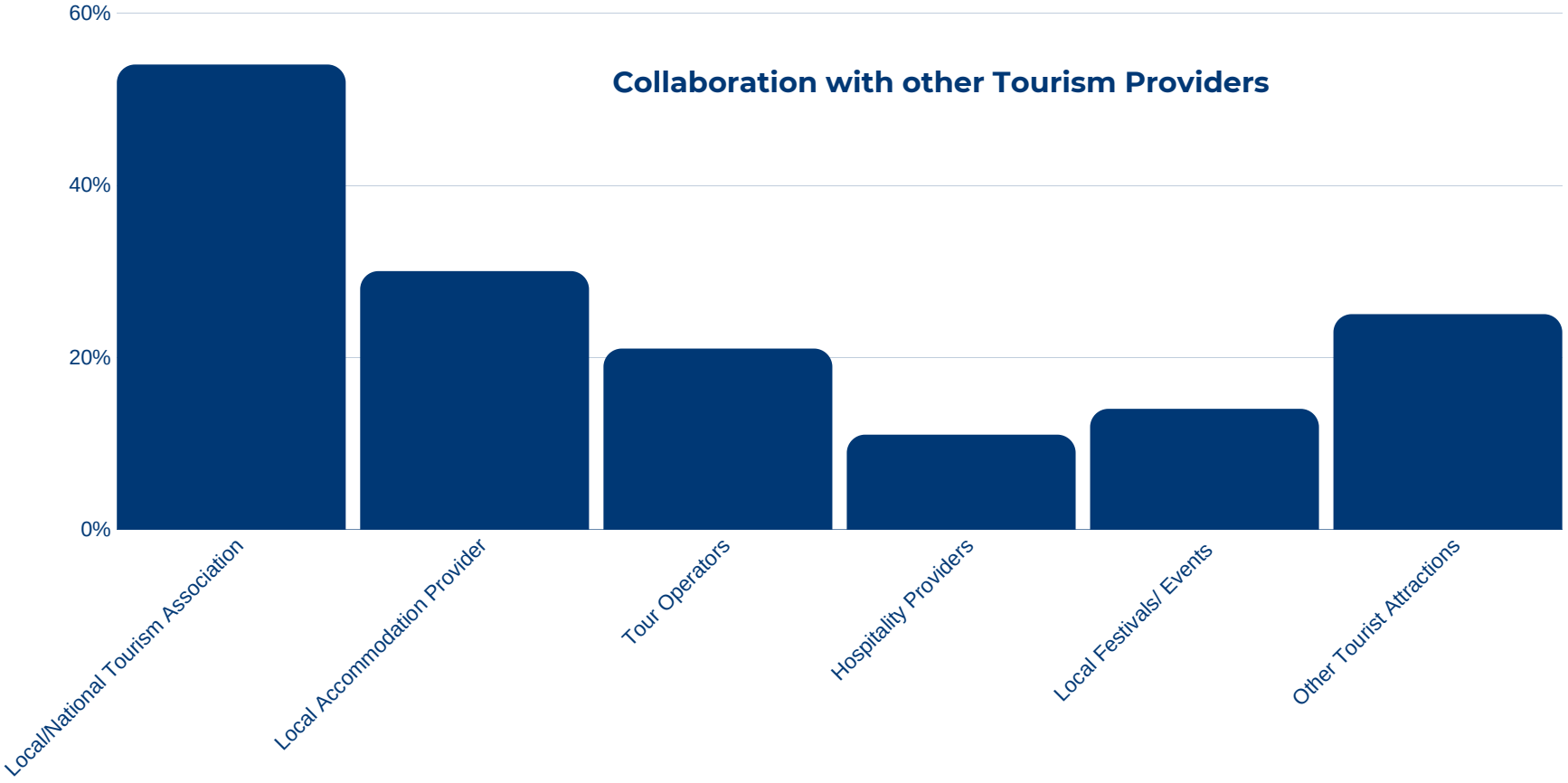
Exchange rates
Film Growth
Weather
Increase Social Media presence
NC500
New addition / refurbishment
Brexit
More European tourists
Word of Mouth
Increase Transport Links
Increased Events

Positive

Poor Summer Weather
Brexit
Exchange Rate
Management
Staffing Issues
Bigger Events Down England
New addition / refurbishment
Location

Negative

Figure 32 Collaboration with other Toursim Providers



Attraction operators were asked whether or not they collaborated/work with other tourism providers. Some 390 operators responded to this question, with 81 operators indicating that they do collaborate with at least one tourism provider.

Of the attractions that responded to this question; just under 54% collaborated with Local and/or National Tourism Associations. Whilst ONLY 11% worked with Hospitality Providers.

SCOTLAND AVERAGE WEATHER

Table 7 Weather Data 2019

AVERAGE TEMPERATURE

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
°C	3	4	6	7	10	13	15	15	13	10	6	5
°F	37	38	42	45	50	55	59	59	55	50	43	40

AVERAGE SEA TEMPERATURE

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
°C	8	7	7	8	10	12	14	15	14	13	11	9
°F	46	45	45	46	50	54	57	59	57	55	52	48

AVERAGE RAINFALL

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
mm	70	50	70	40	50	60	70	50	70	80	70	70
Days	24	20	22	22	21	20	20	21	19	23	21	21

AVERAGE HIGH/LOW TEMPERATURE

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
High °C	5	6	9	11	14	17	19	19	16	13	9	7
High °F	41	43	48	52	57	63	66	66	61	55	48	45
Low °C	1	1	2	3	6	9	11	11	9	7	3	2
Low °F	34	34	36	37	43	48	52	52	48	45	37	36

AVERAGE DAILY SUNSHINE HOURS

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hours	1	4	6	9	7	6	7	10	7	5	1	0

Figure 33 Currency Data: £ - €

CURRENCY

£ - €
Average 2019/2018

3 Year Average
2019 - 2017

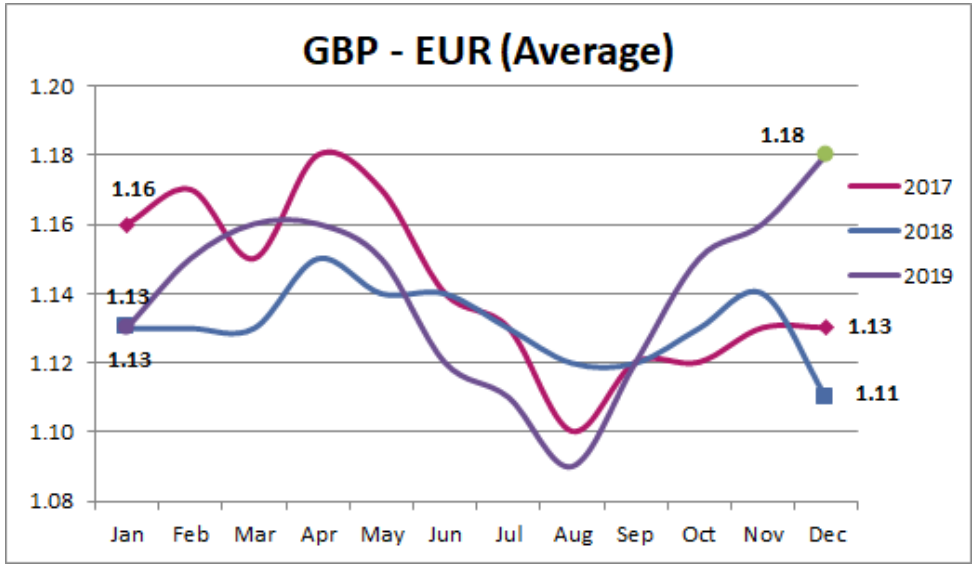
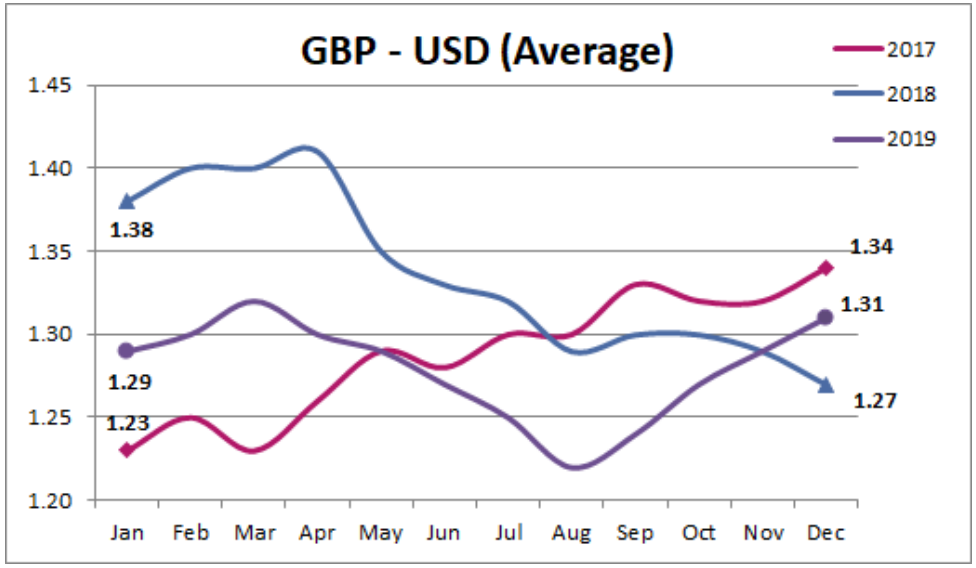


Figure 34 Currency Data: £ - $(US)

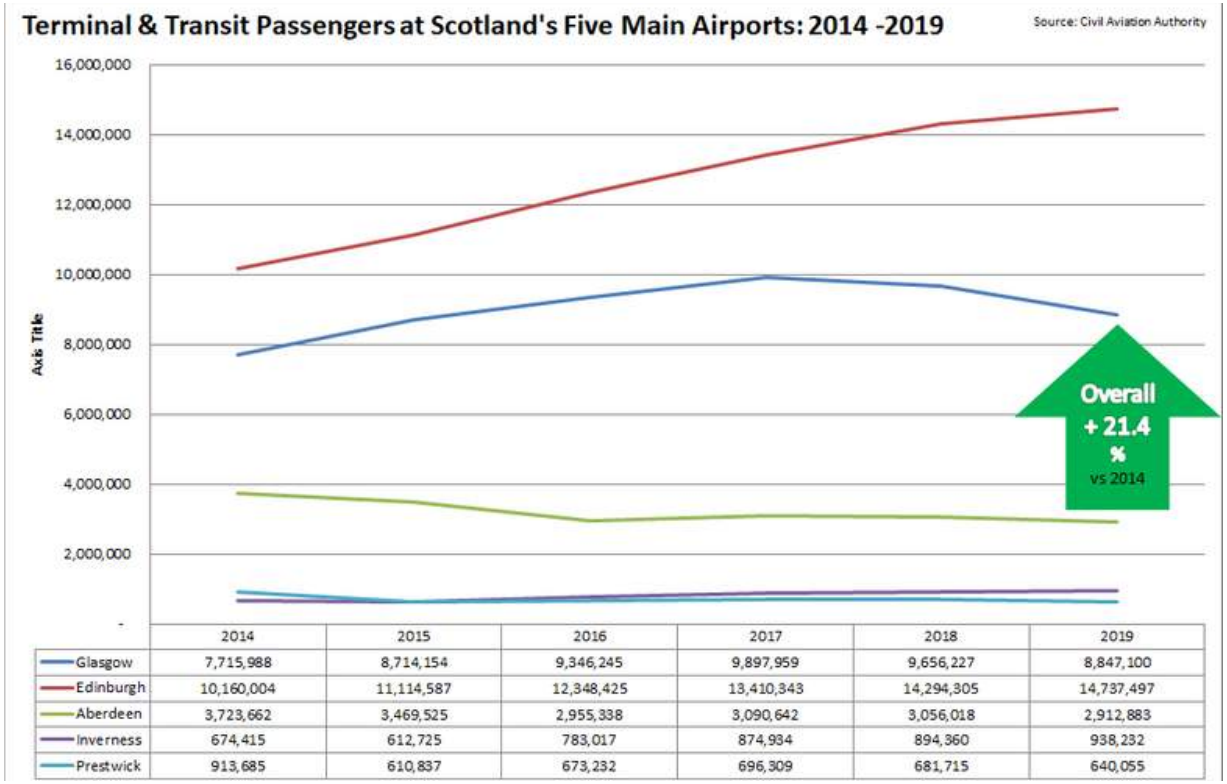
£ - $(US)
Average 2019/2018

3 Year Average
2019 - 2017

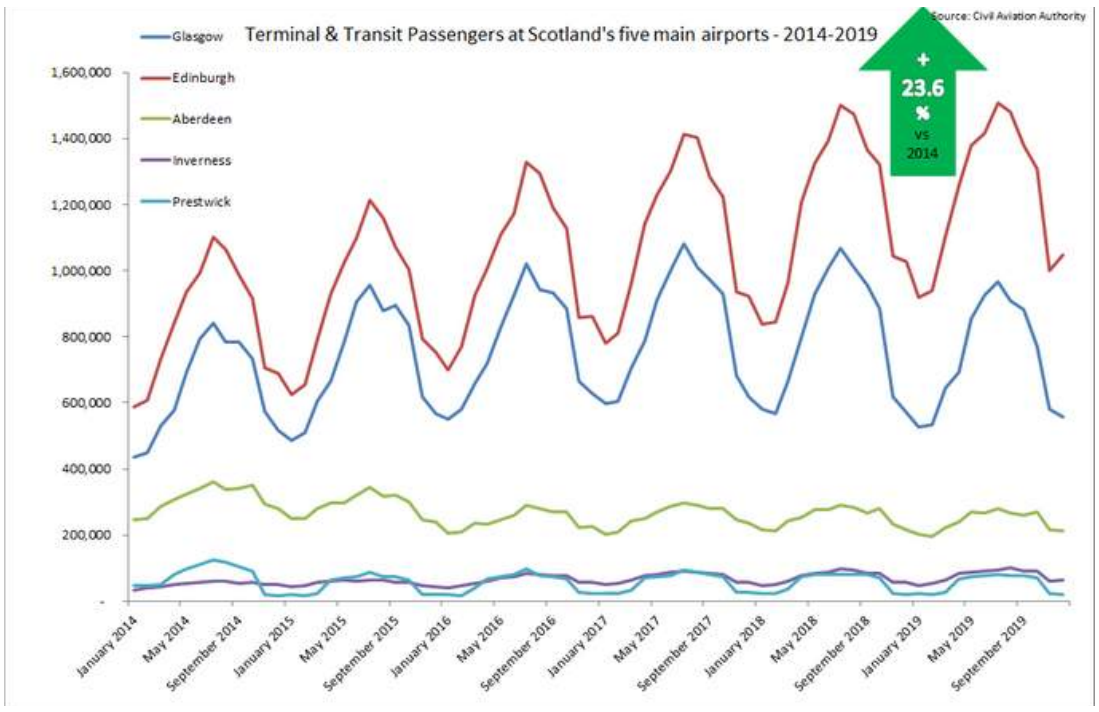


AIRPORT
Top Five Scottish Airports

Figure 35 Top Five Scottish Airports Data

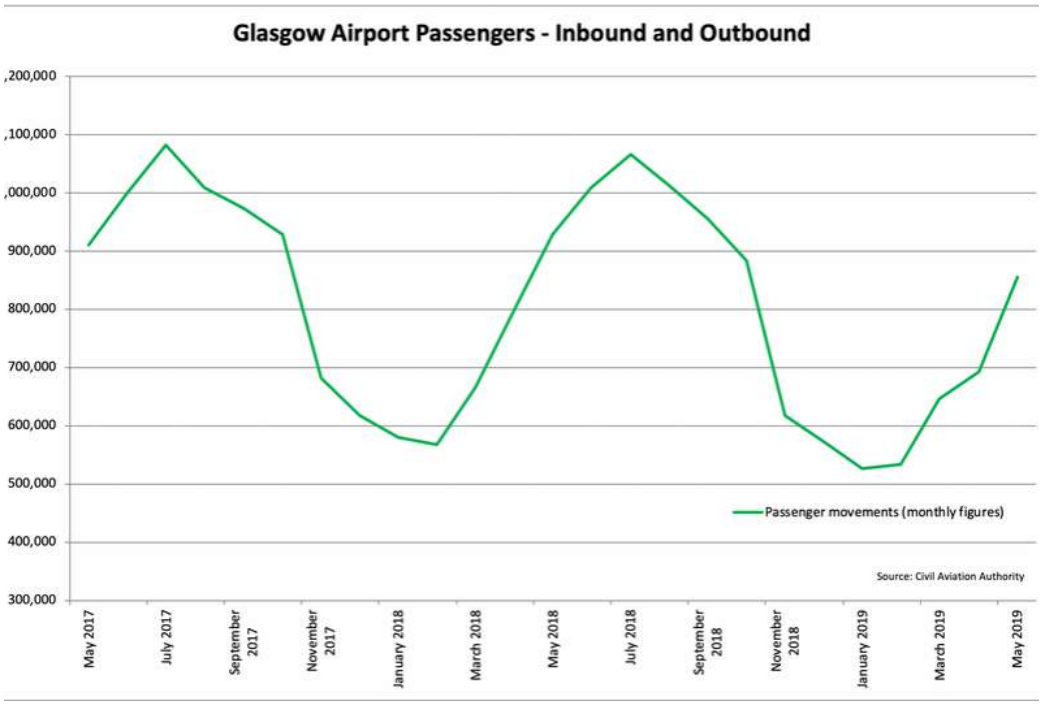


	2014	2015	2016	2017	2018	2019
Glasgow	7,715,988	8,714,154	9,346,245	9,897,959	9,656,227	8,847,100
Edinburgh	10,160,004	11,114,587	12,348,425	13,410,343	14,294,305	14,737,497
Aberdeen	3,723,662	3,469,525	2,955,338	3,090,642	3,056,018	2,912,883
Inverness	674,415	612,725	783,017	874,934	894,360	938,232
Prestwick	913,685	610,837	673,232	696,309	681,715	640,055

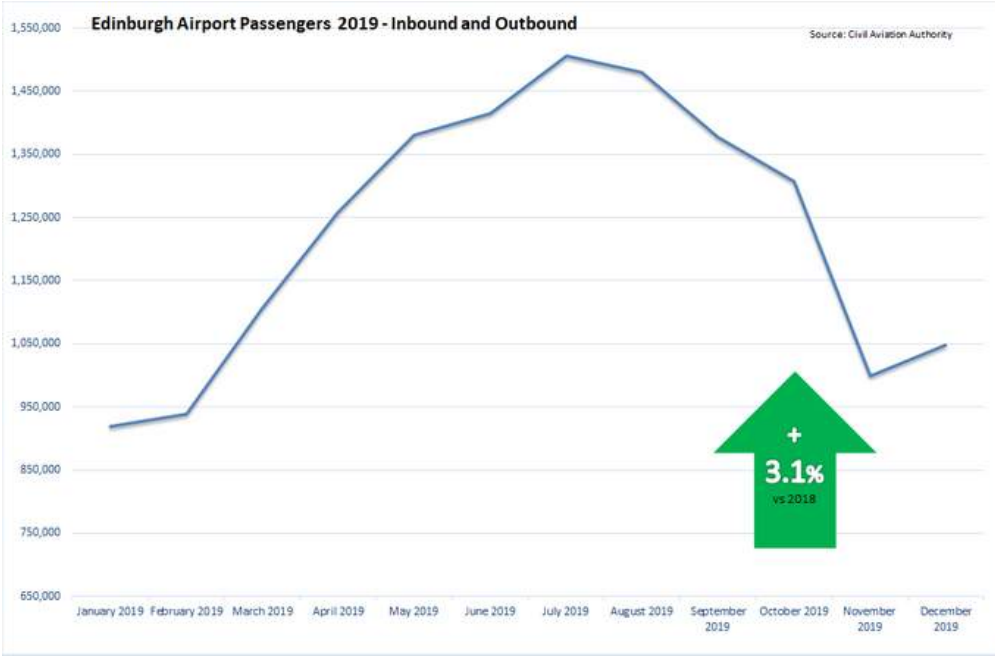


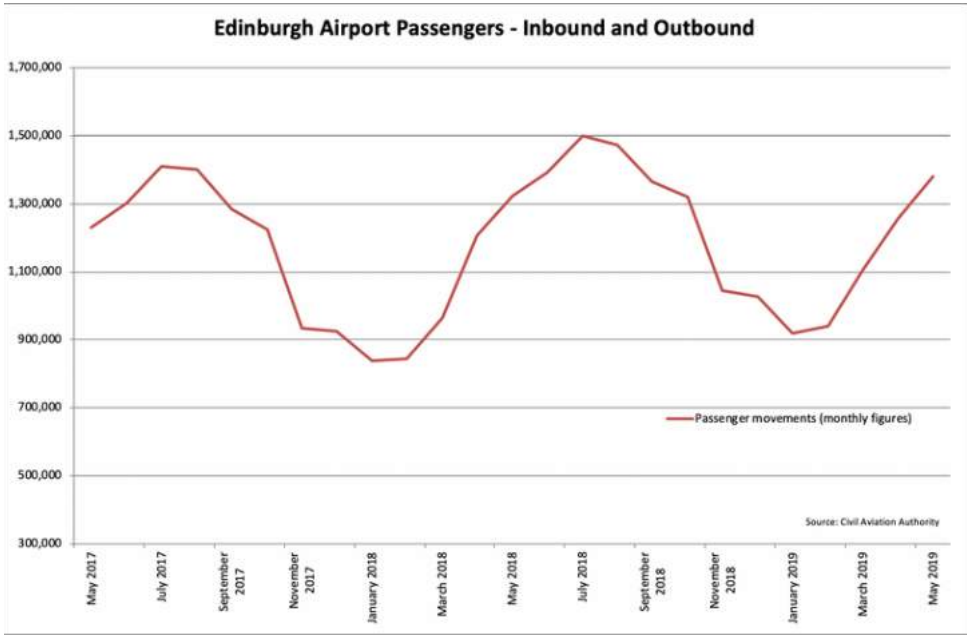
AIRPORT

Glasgow International



Edinburgh

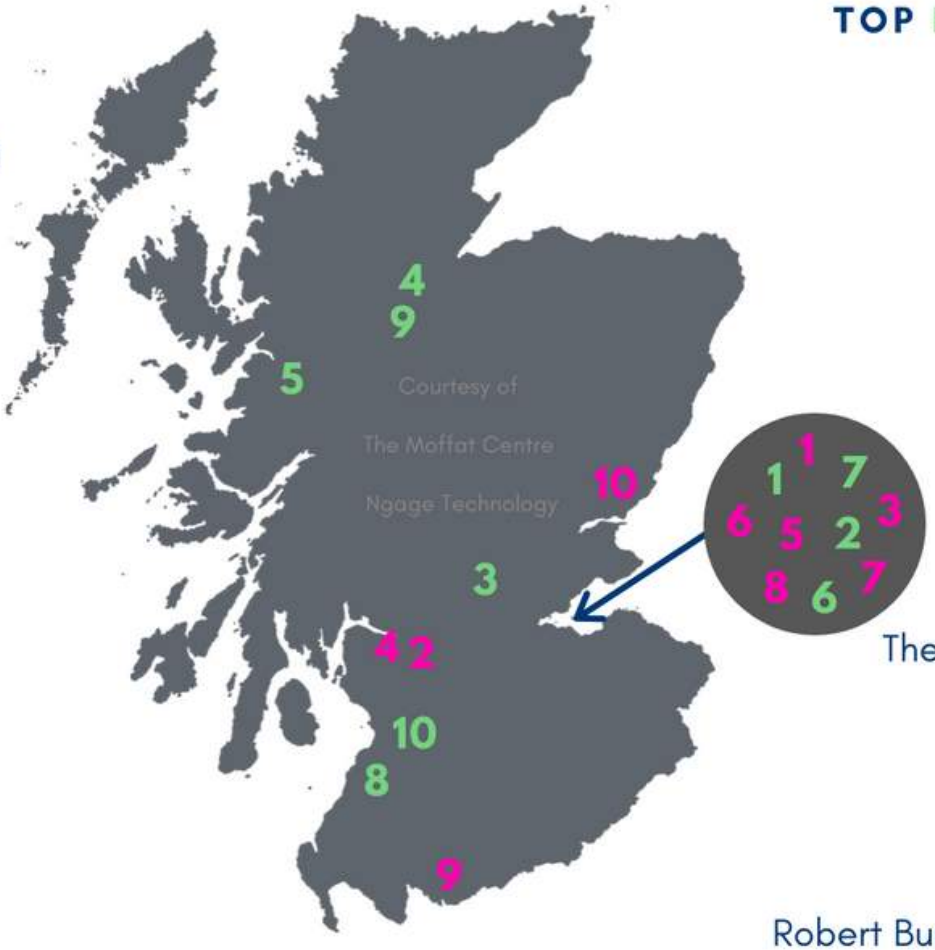




SCOTTISH VISITOR ATTRACTION MONITOR 2019 HIGHLIGHTS

TOP FREE ATTRACTIONS

1. National Museum of Scotland
2. Kelvingrove Art Gallery & Museum
3. Scottish National Gallery
4. Riverside Museum
5. St Giles' Cathedral
6. Royal Botanic Garden Edinburgh
7. National War Museum
8. Regimental Museum of the Royal Scots
9. Gretna Green Famous Blacksmiths Shop
10. V&A Dundee



TOP PAID ATTRACTIONS

1. Edinburgh Castle
2. Edinburgh Bus Tours
3. Stirling Castle
4. Urquhart Castle
5. Glenfinnan Monument
6. The Scotch Whisky Experience
7. The Royal Yacht Britannia
8. Culzean Castle & Country Park
9. Loch Ness By Jacobite
10. Robert Burns Birthplace Museum

TOP 10 PAID ADMISSION ATTRACTIONS

Owner	Attraction	2019	2018	% 19/18	Diff (19-18)	Category	VS Region
HS	Edinburgh Castle	2,167,366	2,111,578	2.6%	55,788	C	ED
P	Edinburgh Bus Tours	614,928	702,789	-12.5%	-87,861	T	ED
HS	Stirling Castle	609,698	605,241	0.7%	4,457	C	AR
HS	Urquhart Castle	547,518	518,195	5.7%	29,323	C	HI
NTS	Glenfinnan Monument	462,235	379,255	21.9%	82,980	OHP	HI
P	The Scotch Whisky Experience	385,733	386,876	-0.3%	-1,143	D	ED
CT	The Royal Yacht Britannia	357,271	390,848	-8.6%	-33,577	OHP	ED
NTS	Culzean Castle and Country Park	333,965	317,875	5.1%	16,090	C	AY
P	Loch Ness by Jacobite	321,980	311,613	3.3%	10,367	T	HI
NTS	Robert Burns Birthplace Museum	261,283	271,137	-3.6%	-9,854	HC	AY

TOP 10 FREE ADMISSION ATTRACTIONS*

Owner	Attraction	2019	2018	% 19/18	Diff (19-18)	Category	VS Region
G	National Museum of Scotland	2,210,114	2,227,773	-0.8%	-17,659	MAG	ED
LA	Kelvingrove Art Gallery & Museum	1,832,097	1,054,562	73.7%	777,535	MAG	GG
O	Scottish National Gallery	1,583,231	1,740,019	-9.0%	-156,788	MAG	ED
LA	Riverside Museum	1,364,739	1,254,498	8.8%	110,241	MAG	GG
RO	St Giles' Cathedral	1,217,991	1,330,816	-8.5%	-112,825	WS	ED
CT	Royal Botanic Garden Edinburgh	893,263	826,860	8.0%	66,403	G	ED
G	National War Museum	805,934	798,165	1.0%	7,769	MAG	ED
CT	Regimental Museum of The Royal Scots	800,607	793,909	0.8%	6,698	MAG	ED
P	Gretna Green Famous Blacksmiths Shop	772,448	770,602	0.2%	1,846	HC	DG
CT	V&A Dundee	621,123	341,265	82.0%	279,858	MAG	AN

*Top 10 Free Admission attractions table does not include Country Park Attractions

Appendix 1 - Analysis Variables 2019

Attraction Categories

The VisitScotland Visitor Attraction Monitor 2009 (VAM) and Barometer (VAB) utilised slightly different categories. We changed those in 2010 to enhance coherence and understanding of the data. The table below shows Former Categories and new Categories The later are now used throughout the report.

Former VAM Categories	New Categories
Castles/Forts	Castles/Forts
Places of Worship	Places of Worship/Spiritual Attractions
Distilleries/Vineyards/Breweries	Distilleries/Breweries/Wineries
Industrial/Craft Workplaces	Industrial/Workplaces
	Distilleries/Breweries/Wineries
	Scottish Crafts/Retail Attractions
Gardens	Gardens
Historic Houses/Palaces	Historic Houses/Palaces
Museums/Art Galleries	Museums/Art Galleries
Historic Monuments/Archaeological Sites	Other Historic Properties
Other Historic Properties	
Country/Forest Parks	Outdoors/Nature Attractions
Heritage/Visitor Centres	Outdoors/Nature Attractions
	Heritage Centres
	Scottish Crafts/Retail Attractions
Steam/Heritage Railways	Transport-Related Attractions
Safari Parks/Zoos/Aquaria/Aviaries/Farms	Wildlife/Animal Attractions
Nature Centres/Reserves/Wetlands/ Wildlife Trips	Wildlife/Animal Attractions
	Outdoors/Nature Attractions
	Activity Attractions
Other	Not applicable any longer – attractions distributed within new categories

- National Nature Reserves (NNRs) (previously included in Nature Reserve/Wetlands/Wildlife Trips)
- Wetlands (previously included in Nature Reserve/Wetlands/Wildlife Trips)
- Visitor Centres with Ranger Service, located within Country Park/NNRs, etc (previously included in Country/Forest Parks or Heritage/Visitor Centre)

The category Wildlife/Animal includes:

- Safari Parks
- Zoos
- Aquarium
- Farms
- RSPB Reserves
- Wildlife Trips(previously included in Nature Reserve/Wetlands/Wildlife Trips)

The new category Transport-Related Attractions includes:

- Steam/Heritage Railways
- Sightseeing Buses
- Boat Trips (not for wildlife sighting)
- Any other transport related attraction – eg Falkirk Wheel

The category Heritage Centres now only includes built/cultural heritage centres:

- Country Park/NNR Visitor Centres are now included within the new category Outdoors/Nature Attractions
- Visitor Centres within workplaces are included within the Distilleries/Breweries/Wineries or the Industrial/Workplaces categories
- A new category has been created for Retail Visitor Centres, now included within Scottish Crafts/Retail Attractions
- Those Visitor Centres that have Museums Galleries Scotland accreditation are classified under Museums/Art Galleries
- Only those that are Heritage Visitor Centres – and are not a Heritage House/Castle/Other Historic Property/Museum Collection remain in this category

Appendix 2 - Changes in Geographic Location Analysis

Changes in Geographic Location Analysis

Up to 2010 attractions were analysed according to whether they were Urban/Rural/Seaside.
This classification was problematic as some attractions could be located in both a Seaside area and an Urban area for example (e.g attractions in Aberdeen)

Two new sets of variables were introduced in 2010 to improve analysis:

- ***Geographic Location***, dividing attractions into three categories:
  - Island based attractions
  - Coastal attractions (located within approximately one mile of the coast)
  - Inland attractions (encompassing the remainder of attractions).

- Location according to the Scottish Government's 2013-2014 ***Urban Rural Classification,*** dividing attractions into the six categories shown in the following table.

[redacted]

Category	Description
Large Urban Areas	Settlements of over 125,000 people.
Other Urban Areas	Settlements of 10,000 to 124,999 people.
Accessible Small Towns	Settlements of 3,000 and 9,999 people and within 30 minutes drive of a settlement of 10,000 or more.
Remote Small Towns	Settlements of 3,000 and 9,999 people and with a drive time of over 30 minutes to settlement of 10,000 or more.
Accessible Rural	Settlements of less than 3,000 people and within 30 minutes drive of a settlement of 10,000 or more.
Remote Rural	Settlements of less than 3,000 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.

For more information, consult the Scottish Government's website at:
www.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification

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