



Insight Department:
Perth and Kinross Factsheet | 2019

Published: January 2021





Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in Scotland's Perth and Kinross region. It gathers information from a suite of tourism monitors managed by VisitScotland's Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey** (GBTS) that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on visitbritain.org.
- **The International Passenger Survey** (IPS) which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website.
Please note: In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.
- **The Great Britain Day Visits Survey** (GBDVS) that provides data for tourism day visitors resident in Scotland, England and Wales. More information about the survey can be found on visitbritain.org.
- **The Scottish Accommodation Occupancy Survey** (SAOS) that provides data on occupancy in Scotland's tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution.

To reduce error margins, it is useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as visitors' region of residence, purpose of travel, or seasonality of trips.

Annual visitor figures are provided on pages 6 and 7, as well as in the form of a historical trend chart on page 9. These ensure the publication is consistent with other regional factsheets published on visitscotland.org and indicate changes in tourism performance over time. Yet, it is recommended to refer to the 3-year average figures on page 3 when analysing volume and value of tourism in the region.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS.

This report starts with an **overall** evaluation of Perth and Kinross tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance in the region since 2013.

Sources

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- Moffat Centre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018

I. Overall Tourism in Perth & Kinross

Latest Figures

Lady Mary's Walk
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Overall Tourism Summary: Visits, Nights and Spend in Perth & Kinross, 2017-2019 Annual Average Figures

VISITS BREAKDOWN	Visits		Nights		Spend	
	2017-19 Average (000s)	% Change 2016-18/2017-19	2017-19 Average (000s)	% Change 2016-18/2017-19	2017-19 Average (£m)	% Change 2016-18/2017-19
Europe	75	+4%	228	+15%	29	+14%
North America	30	-14%	96	-8%	12	-13%
Rest of World	31	+41%	264	+159%	18	+132%
Total International Overnight	136	+5%	588	+45%	59	+25%
Scotland	429	-2%	1,076	-1%	79	+10%
Rest of Great Britain	265	+16%	1,040	+14%	79	+18%
Total Domestic Overnight	694	+4%	2,116	+6%	158	+14%
Total Overnight Tourism	830	+4%	2,704	+12%	217	+17%
Total Day Tourism	5,530	-6%	N/A	N/A	177	-4%
Grand Total	6,360	-5%	2,704	+12%	394	+7%

Sources: IPS/GBTS/GBDVS, 2017-19. Figures may not sum up due to rounding.

National figures are available in the *Key Facts on Tourism in Scotland 2019* report published on visitscotland.org.

Visitors to Perth & Kinross

Tourism Performance | 2019

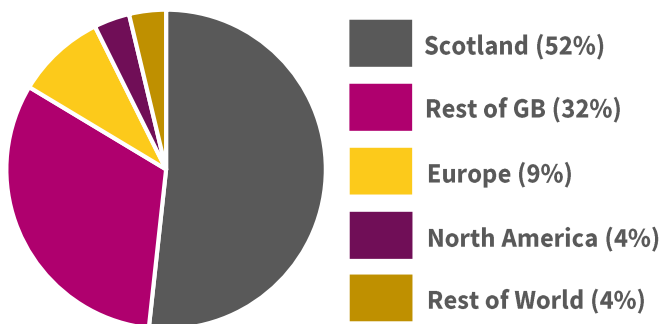
In 2019, Perth and Kinross witnessed **growth in overnight tourism**. Annual visitor figures suggest that domestic travellers increased slightly, while international visitor figures rose massively from 2018 when they were the lowest in a decade.

Looking at 3-year average figures offers us higher data reliability and gives us the chance to explore the drivers behind tourism performance in more detail. Between 2017 and 2019, there were 830,000 **overnight trips** per year on average to Perth and Kinross which marks a **4% growth** from 2016-2018. Number of **bednights** were 2.7 million per year (**+12%**), while average annual **expenditure** reached £217 million (**+17%**).

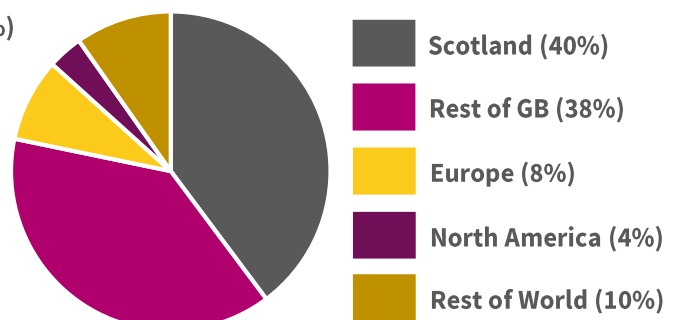
Unlike most of the other regions of Scotland where recent tourism performance was underpinned by a rise in Scottish travellers, Perth and Kinross experienced growth in overnight tourism due to **higher number of English and overseas visitors**. In 2017-2019, international travellers made 5% more trips to the region and spent 25% more money than in 2016-2018. The volume and value of tourism from the rest of Great Britain rose by a sixth over the same period. Nevertheless, **residents of Scotland continued to be essential** for tourism in Perth and Kinross, generating 52% of all overnight travel and 36% of all overnight expenditure in the region in 2017-2019.

Domestic **day tourism trips** in Perth and Kinross **declined** to 5.5 million per year (-6%) in 2017-2019. Associated annual spend dropped to £177 million on average (-4%), bringing the net tourism expenditure in the region **to nearly £400 million per year** between 2017 and 2019.

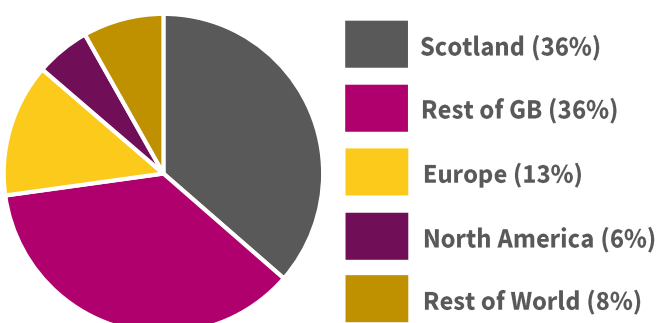
Overnight Visits



Nights



Overnight Spend



Sources: GBTS/IPS, 2017-19. Figures may not sum up due to rounding.

Regional Tourism Performance

Local Statistics

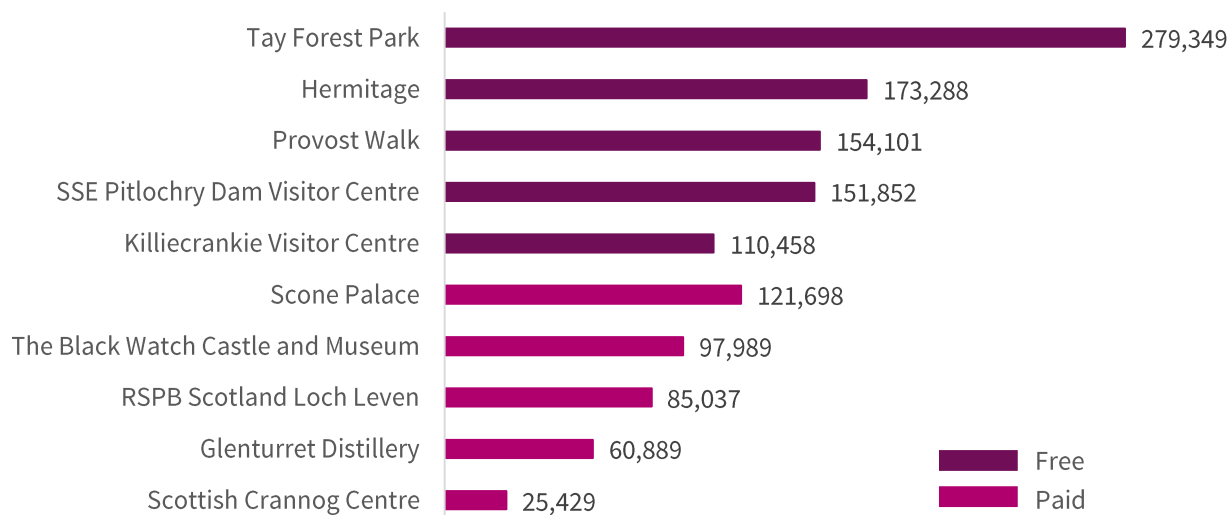
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Perth and Kinross	677	+2%	8.3	+5%	203.5	+4%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit visitscotland.org.

*The Scottish Government defines sustainable tourism as a growth sector including a number of business types [detailed on their website](#). Latest statistics were published on 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Perth & Kinross (with Visitor Numbers), 2019



Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.

VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact info@moffatcentre.com.

Occupancy Rates by Accommodation Type and Month, Perth & Kinross 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	46%	63%	64%	62%	75%	79%	77%	85%	82%	70%	56%	33%	66%
Guest House/B&B (Room Occ.)	31%	31%	25%	34%	49%	39%	47%	61%	49%	31%	10%	22%	39%
Self-Catering (Unit Occ.)	23%	34%	31%	57%	41%	45%	70%	58%	46%	59%	28%	28%	38%
Hostel (Bed Occ.)	47%	50%	84%	50%	62%	49%	57%	68%	59%	51%	83%	55%	59%

Source: SAOS, 2019.

II. International Visitors to Perth & Kinross

Overnight Tourism

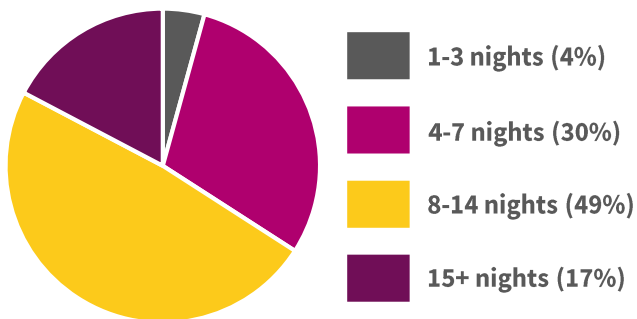
Figures suggest a **substantial growth in international tourism** to Perth and Kinross in 2019, with visits nearing 150,000 and spend totalling at £71 million. It is important to note that 2018 figures were the lowest in ten years and they were based on a relatively low sample size, so it is recommended to also consider the **3-year average** figures when evaluating changes in tourism performance. Between 2017 and 2019, seven in ten overseas travellers visited Perth and Kinross for a **holiday**, and half of all spent **between one and two weeks** in the region. International visitors have a strong preference for **summer** travel, with less than a quarter of all trips to the region occurring between October and March.

International Tourism Performance, 2019 and 2017-19 Annual Average Figures

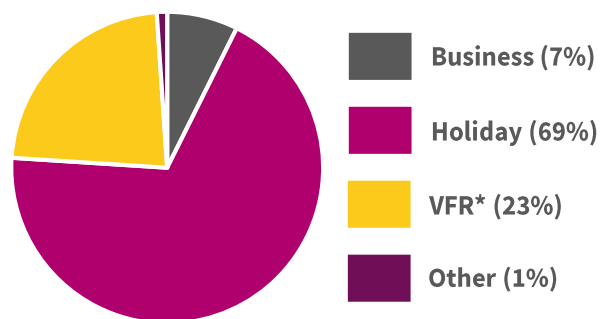
Indicators	Scotland		Perth & Kinross			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19*	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	3,460	-7%	147	+65%	136	+5%
Spend (£M)	2,538	+7%	71	+160%	59	+25%
Nights (000s)	27,385	+8%	948	+243%	588	+45%
Average length of stay	7.9 nights	+16%	6.4 nights	+108%	4.3 nights	+38%
Average spend per day	£93	0%	£75	-24%	£100	-14%
Average spend per visit	£734	+15%	£486	+58%	£434	+19%

Source: IPS, 2019. *Percent change should be treated with caution due to low sample sizes for 2018 data.

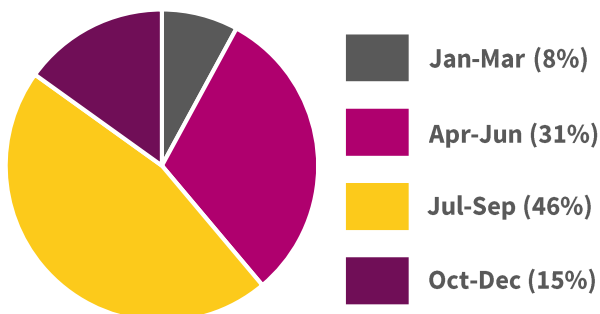
Duration of Stay



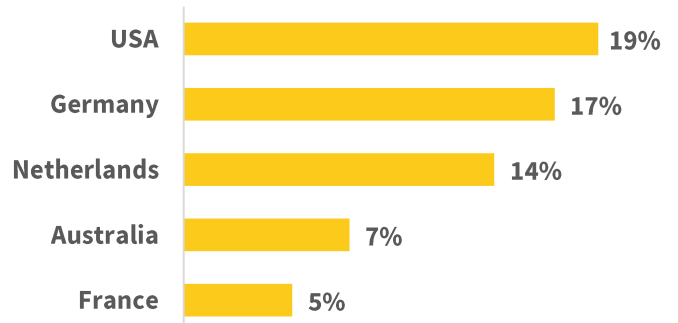
Purpose of Travel



Seasonality



Top 5 Overseas Markets



Source: IPS. All charts are based on 3-year average data (2017-2019).

*VFR = Visiting friends or relatives.

III. Domestic Visitors to Perth & Kinross

Overnight Tourism

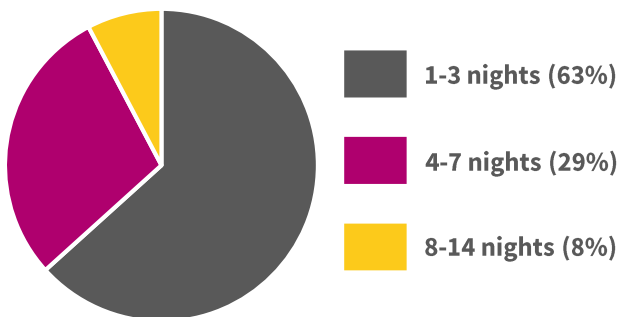
In 2019, domestic tourism performance in Perth and Kinross did not differ drastically from 2018. While **trips increased** by 3%, number of **bednights dropped** by 7% to 2.1 million. These changes seem to have not affected domestic overnight **expenditure** in the region which was **almost identical** at £171 million. The 2019 decreases in bednights and average length of stay were driven by a drop in trips lasting longer than a week which in 2018 were much more than in any other recent year. The impact this had on visitors' average spend per trip in 2019 was largely offset by an increase in average daily spend underpinned by a higher proportion of **English visitors**. Nearly half of all domestic trips to Perth and Kinross between 2017 and 2019 were made by people over the age of 55.

Domestic Overnight Tourism Performance, 2019

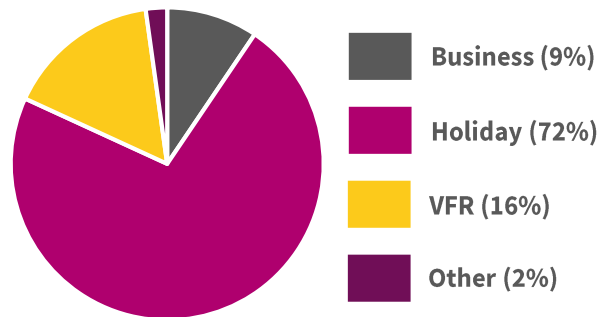
Indicators	Scotland		Perth & Kinross			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	13,810	+17%	722	+3%	694	+4%
Spend (£M)	3,200	+16%	171	+1%	158	+14%
Nights (000s)	46,413	+15%	2,122	-7%	2,116	+6%
Average length of stay	3.4 nights	-2%	2.9 nights	-10%	3 nights	+2%
Average spend per day	£69	+1%	£81	+8%	£75	+8%
Average spend per visit	£232	-1%	£237	-3%	£227	+10%

Source: GBTS, 2019.

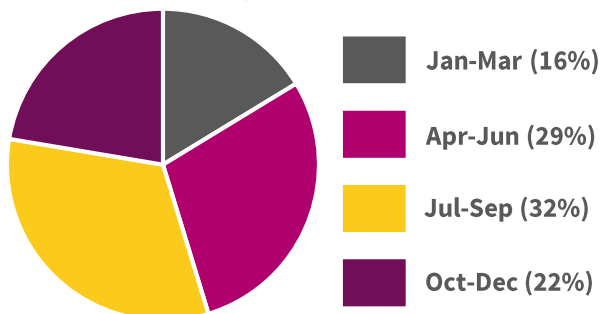
Duration of Stay



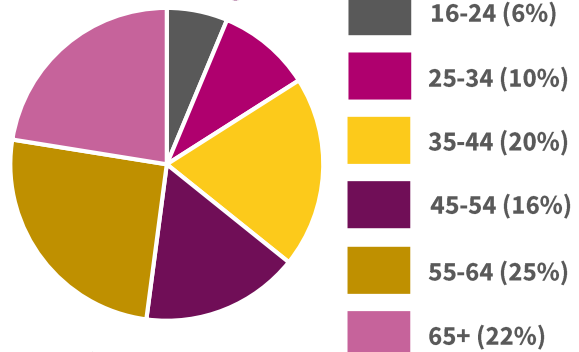
Purpose of Travel



Seasonality



Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding.

Domestic Day Visits to Perth & Kinross

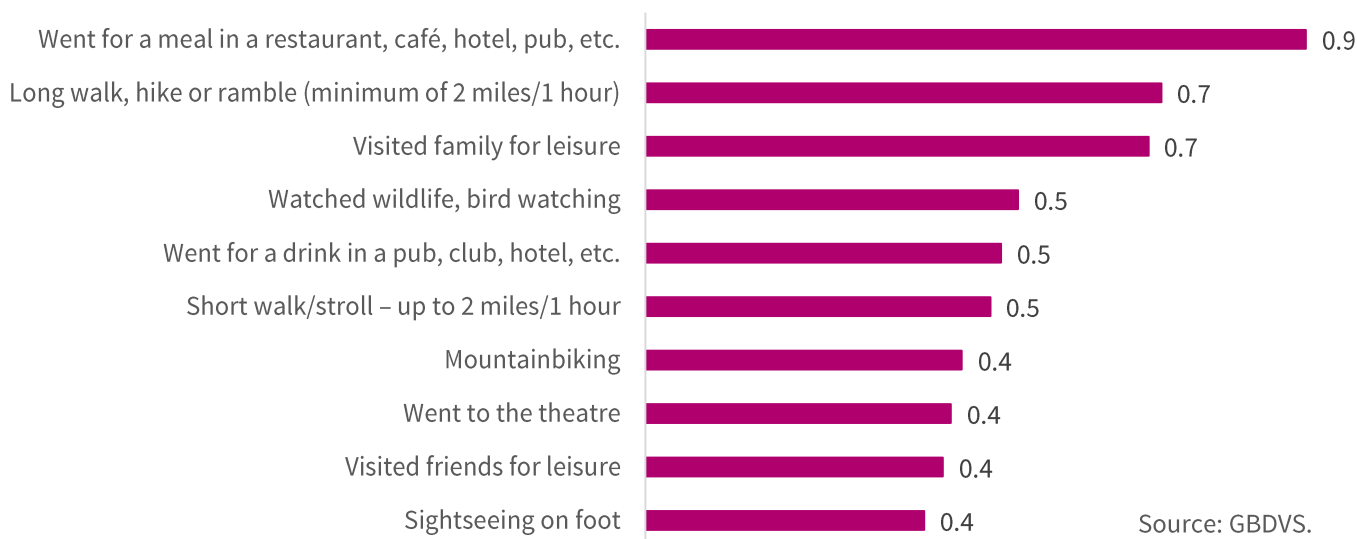
Tourism Performance and Activities

National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

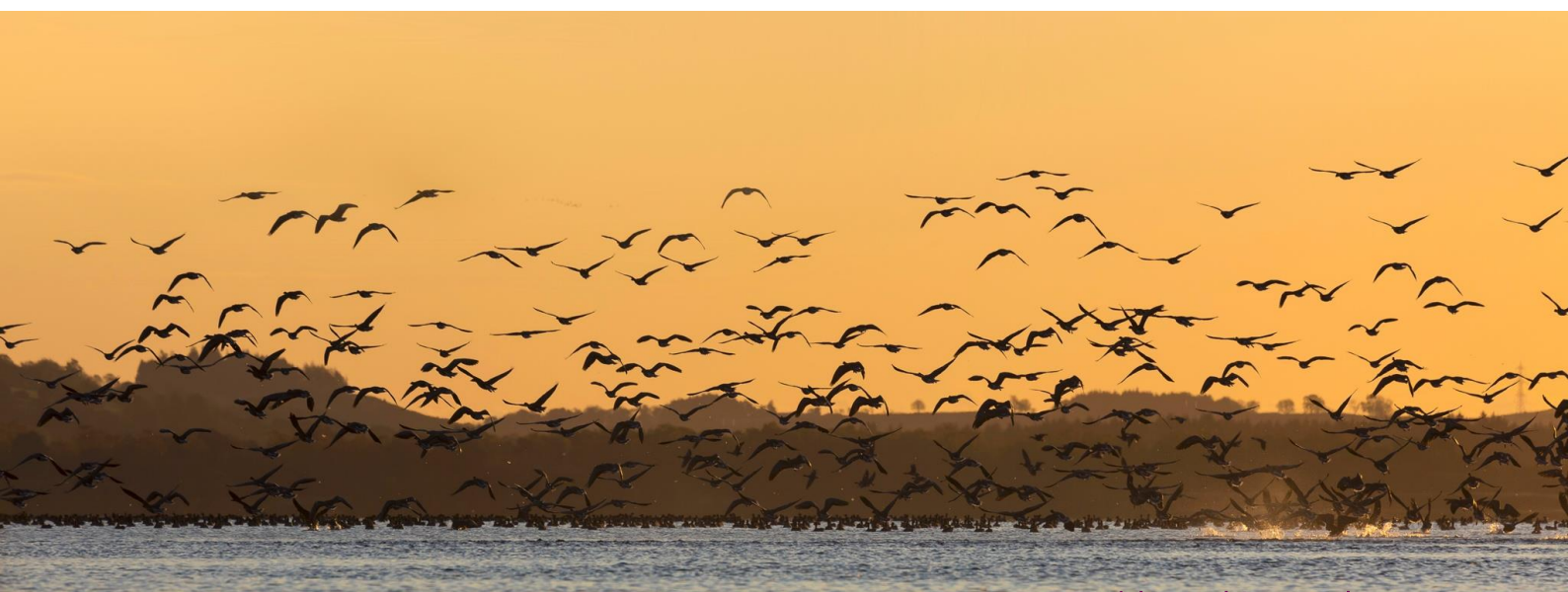
	Visits		Spend	
	2017-19 Average (million)	% Change 2016-18/2017-19	2017-19 Average (£ million)	% Change 2016-18/2017-19
Scotland	140.8	-2%	5,749	+5%
Perth & Kinross	5.5	-6%	177	-4%

Source: GBDVS.

Most Popular Activities Undertaken as Part of a Day Trip, Perth & Kinross: 2016-18 Average Annual Figures (Number of Day Trips in Millions)



Source: GBDVS.

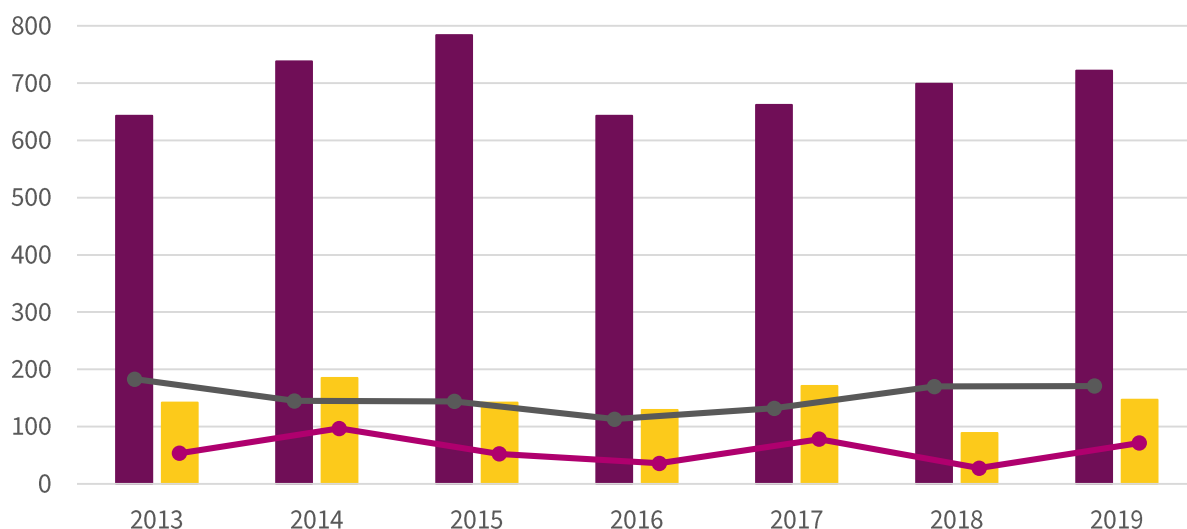


Visitors to Perth & Kinross

Historical Trend Information | 2013 - 2019

In the context of the previous several years, 2019 – the year in which the region hosted the Solheim Cup – was a very good year for overnight tourism to Perth and Kinross. Total overnight **trips** were at their **highest since 2015**, while associated **expenditure** was the **highest in seven years**. Tourism performance in the region is largely driven by British residents who accounted for 84% of all overnight trips and 73% of all overnight spend between 2015 and 2019. After decreasing in 2016, the volume and value of **domestic** overnight tourism to Perth and Kinross **grew for a third consecutive year** in 2019. Following a few years of steady growth, international tourism performance in the region has become more variable and unpredictable since 2014.

Domestic and International Overnight Tourism, 2013-2019



Legend: Domestic Trips (000s) Overseas Trips (000s) Domestic Spend (£m) Overseas Spend (£m)

Sources: GBTS, IPS.

Domestic and International Overnight Visits, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (000s)	643	738	784	643	662	699	722
International (000s)	142	185	142	129	171	89	147
Total Overnight (000s)	785	923	926	772	833	788	869

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	183	145	144	113	132	170	171
International (£m)	53	97	53	36	78	27	71
Total Overnight (£m)	236	242	197	149	210	197	242

Sources: GBTS, IPS.



Appendix

USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre's Scottish Visitor Attraction Monitor (VAM) and ONS' Scottish Annual Business Survey (SABS).

SAMPLE SIZES

Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section).

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