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11. **Introduction**

**(Insert copy/Drafted David Smythe, Chair Perthshire Tourism Partnership)**

1. **Background & Strategic Context**

The Perthshire Tourism Action Plan identifies the priorities for action by the tourism industry, agencies and stakeholders to support sustainable growth in the value of tourism and to ensure that it continues to make a significant contribution to the economy, to the quality of life and vibrancy of the Perth & Kinross area.

The plan has been developed in response and as a contribution to wider national and regional tourism objectives. It is aligned to Scotland Outlook 2030, the new National Tourism Strategy, the Tay Cities Regional Tourism Strategy 2019-2024 and contributes to the Perth & Kinross Community Plan and Perth City Plan 2020-2040.

There is a “golden thread” which demonstrates how these strategies and plans sit together. The Perthshire Tourism Action Plan contains priority actions which should support and reflect the higher-level objectives, while comprising local priorities, providing a road map for the tourism industry in Perth & Kinross area.

**N.B. Above graphic difficult to view, change background colour**

**Scotland Outlook 2030: National Tourism Strategy**

The national tourism strategy launched in March 2020 sets out the ambition for tourism in Scotland:

Vision: *Scotland. We will be the world leader in 21st century tourism*

Mission: *Together we will grow the value and positively enhance the benefits of tourism across Scotland by delivering the very best for our visitors, our businesses, our people, our communities and our environment.*

Four Strategic Priorities: Our passionate people, our thriving places, our diverse businesses, our memorable experiences.

**Tay Cities Regional Tourism Strategy 2019 – 2024**

The Tay Cities Regional Tourism Strategy launched in 2019 and sets out the priorities for the sector at regional level through collaborative action. The regional strategy was developed following extensive industry consultation in line with the Tay Cities Regional Economic Strategy. The Perthshire Tourism Action Plan has been designed as the Perth & Kinross response to this regional strategy, while also being cognisant of specific challenges and opportunities at a local level.

The Tay Cities Regional Tourism Strategy comprises the following:

Vision: *By 2024, tourism will play a greater role in the Tay Cities Region by supporting an inclusive, innovative, international, connected and empowered Tay Cities Region economy*

Mission: *To work collaboratively to strengthen tourism in the Tay Cities Region, ensuring regional and seasonal spread and a continued commitment to delivering quality visitor experiences for all*

Strategic Objectives:

* Grow the value of overnight stays across the region from £433m (2016) to £550m in 2024
* Improve the all-round experience for visitors across the region
* Address common challenges, such as connectivity, accessibility, seasonality, and productivity

The strategy has a focus on the development of regional destination connectors: Culture & Creative Industries; Food and Drink; Outdoor Adventures.

And based on the shared based values:

Collaboration; Industry Leadership; Sustainable Growth; Quality of Life; Professional Development.

**The Perth and Kinross Strategic Context**

This Perthshire Tourism Action Plan will contribute to the Perth & Kinross Community Plan / Single Outcome Agreement vision of *“a confident and ambitious Perth and Kinross to which everyone can contribute and in which all can share”.*

The Community Planning Partnership (CPP) Economy and Lifelong Learning Outcome Group delivers a series of actions in support of the plan and the Tourism Plan contributes to the strategic objective of “*promoting a prosperous, inclusive and sustainable economy”* and the local outcomes of: “*A thriving, expanding economy” and “Employment opportunities for all*”.

The Perthshire Tourism Action Plan also contributes to the Perth City Plan which articulates the vision for Perth as a vibrant, cultural, city break and business tourism destination with planned investment in events, cultural assets and the built environment. Now in its third edition, the Plan has been revised to reflect some specific challenges including climate change and sets out an agenda for “good growth” with a framework for action based on six key themes: placemaking, sustainability, connectivity, the city centre, enterprise and inclusion.

**Strategic Issues**

The Perthshire Tourism Action Plan is designed to complement the strategies outlined above. It has also been developed in the context of the ever-changing environment for tourism at both a global and local level. Factors which are of relevance here include:

1. ***Environmental Impacts and Climate Change***

The move to a net zero carbon economy by 2045 has been extensively profiled. This will have wide reaching impacts for the sector, from the use of energy and materials, to products and transportation. There is greater awareness of the impacts of tourism in an environmental context and locally there are some community concerns regarding the impact of the growing motorhome/campervan market, freedom camping and other traffic and waste concerns. The theme of developing a sustainable and responsible approach to tourism growth is outlined in this action plan.

1. ***Changing Regulatory Environment***

It is recognised that changes in regulation and government policy impacts on the tourism sector. The Scottish Government is giving powers to local authorities to develop a Transient Visitor Levy (“tourism tax”) and is preparing proposals for new legislation on Short Term Lets. Over the lifetime of this action plan it will be important to monitor developments and for agencies and industry to prepare responsive actions.

1. ***Employment and Skills***

Labour supply and skills is a recurring theme for the sector and the problem will become more pronounced following UK leaving the EU and given emerging proposals for no visa provision for “unskilled” workers. This will have profound implications for hospitality businesses. The challenges of attracting and retaining talent and matching labour supply and opportunities will remain and these are being addressed at a regional level through the Tay Cities Regional Skills Investment Plan.

1. ***Industry Leadership and Collaboration***

The tourism sector in Perth & Kinross, as with the rest of Scotland, is characterised by micro and small to medium sized enterprises. Industry face challenges in stepping away from the business to consider collective leadership actions. The Perthshire Tourism Partnership and Local Tourism Associations remain a forum for bringing interested parties together from different localities. However, it is recognised that fragmentation remains and there is limited capacity for business owners to participate in joint industry initiatives. The action plan has been co-created by industry representatives and consideration is being given to leadership development and effective processes and structures to oversee the implementation of it.

1. ***Tourism Data and Intelligence***

A challenge remains in analysing, interpreting and sharing tourism data and market intelligence to industry in a way that is of value to businesses. From web analytics to market trends, there is a broad range of information available and due consideration will be given to how pertinent data is disseminated and used by industry and public agencies alike.

**Drivers of Growth**

While the Perthshire Tourism Action Plan recognises strategic issues facing the tourism sector, there are five key drivers for tourism growth, and these can help to inform and guide local actions:

1. **Capital investment** – ongoing investment in improving facilities is essential for the development of quality products.
2. **Cross selling** – challenging tourism businesses to work closely with other businesses and to build relationships with customers in order to maximise expenditure opportunities.
3. **Market positioning** – this is about developing quality products and visitor experiences which attract higher value markets, namely driving high value not necessarily high prices.
4. **Capacity utilisation** – achieving higher occupancy by addressing seasonality and periods of capacity through innovative efforts to grow volume and value.
5. **Incremental marketing** – sustaining marketing expenditure (public and private sector) in the face of massive domestic and international competition and in a challenging economic climate and adopting innovative and targeted marketing techniques aimed at increasingly sophisticated and digitally focused consumer market segments

The above points demonstrate that the environment for tourism is challenging and constantly evolving. The Perthshire Tourism Action Plan needs to be flexible and moveable. It will be subject to regular monitoring, review and revision going forward.

1. **Tourism Mega Trends**

There are four Megatrends identified in the new national tourism strategy Beyond 2020. Megatrends describe global shifts impacting on Scottish tourism. We can increasingly see examples of how businesses are capitalising on trends to grow and attract new markets. Global tourism experts refer to twelve Megatrends happening today. By merging these original twelve, four key Megatrends evolved into the most relevant for Scotland looking forward to 2025.

* EXPERIENCE MORE – offering more genuine experiences and helping visitors to be more than ‘tourists
* LIMITLESS DISCOVERIES – marketing the whole of Scotland, not just the favourite place
* EVOLVING TRAVELLER – recognising the many different types of visitors, both culturally and demographically
* TECHNOLOGY TO STIMULATE AND INFORM – using widely available technology and data capture to improve and influence the visitor experience

A picture containing photo

Description automatically generated

Opportunities in Perthshire to drive visitation and build on the above mega trends include cultural tourism with key assets such as V&A Dundee, Perth City Hall 2023 & the Cultural Transformation Programme. There are a host of new touring routes offering alternative ‘slow tourism’, such as Scenic Snow Road, Heart 200 and the major dualling and electrification of the A9. Visitors to our area predominantly self-drive with 95% of all visitors arriving by car. We will look to encourage use of public sector transport and communicate widely the existing EV charge point network in our area. Perthshire can also maximise on the opportunities presented by themed years such as Year of Scotland’s Coast and Waters 2020 and Year of Scotland’s Stories 2022, as well as its thriving events & festivals programmed to attract visitors year-round.

1. **A Vision for the Perthshire area**

**Our vision**

*Perthshire will be a leading sustainable destination in Scotland*

**Our mission**

*Together we will grow the value and positively enhance the benefits of tourism across Perthshire by delivering the best for our environment, our visitors, our businesses and our communities*

1. **Our Strategic Objectives**

In order to grow the visitor economy in the Perthshire area, our strategic objectives will be

1. To establish Perthshire as a leading responsible tourism destination in Scotland
2. To grow the volume of overnight stays by 3% per annum with a focus on the ‘off season’
3. To increase the impact and benefit of tourism across Perthshire’s communities
4. To make Perthshire a digitally discoverable and enabled destination

**Figure 1 Overview of the Perthshire Action Plan (Insert diagram)**

1. **Our Visitors**

What do we know about visitors to Perthshire?

At present 89% of visitors to Perthshire are from the domestic market, of that 65% are Scottish residents travelling in Scotland. The North West of England and London/South East continue to be the biggest sources of English visitors to our area, many of these are repeat visitors. This plan will look to target the domestic visitor and focus on growing the length of stay.

To do this we aim to maximise the extra capacity in our area, move day visitors to overnight stays, develop packages and encourage visitors to base themselves in and around the Tay.

The remaining 11% of all visitors to Perthshire are international from the top five markets of USA, Germany, France, Netherlands and Australia. We will focus on retaining & growing the visitors into our area from USA, Canada & Germany. To do this we aim to work with the Tay Cities Regional Tourism Partnership working with destination management organisations and tour operators to raise awareness of the tourism product in Perthshire and the wider Tay Cities Region.

[UK consumer market segmentation](https://www.visitscotland.org/research-insights/about-our-visitors/uk) undertaken by VisitScotland identified the segments with the greatest potential for Scotland, in terms of return on marketing investment. This considered trends and changes in consumer behaviour and holiday patterns, media choices and propensity and attitudes to visiting Scotland. The UK consumer segments identified as the areas of potential opportunity and competitive advantage for the Perthshire area are

**Primary Markets**

Adventure Seekers; *Adventure Seekers want an active holiday where they can enjoy both outdoor and cultural activities. They will venture off the beaten track and will be engaged by trying new things and pushing their limits and experiences. Holidays will really energise them*

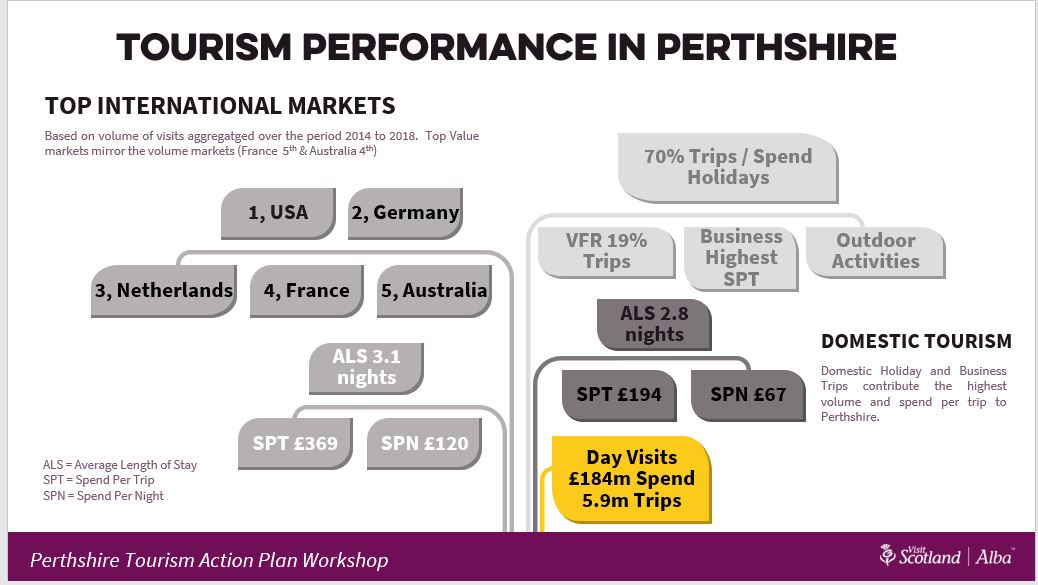
Natural Advocates; *Natural Advocates are passionate about Scotland as it offers everything they want from a holiday; breath taking scenery, a connection with nature and the chance to get away from it all. A holiday in Scotland will really help them to unwind, recharge and enjoy quiet time*

Food Loving Culturalists; *Food-Loving Culturalists will seek out a relaxing holiday experience where they can enjoy great food and drink and engaging cultural activities. They enjoy short breaks in the UK and will recommend quality experiences when their host has gone the ‘extra mile’*

**Secondary Markets**

Curious Travellers; *Curious Travellers like to live life to the full and enjoy traveling as a hobby. They have an overwhelming desire to explore new destinations and discover new things. A holiday will often broaden their minds, educate and revitalise them*

Engaged Sightseers; *A love of holidays drives Engaged Sightseers to plan numerous breaks in a year. They enjoy general sightseeing and touring, taking in historical places as well as scenery and nature. They relish engaging with friendly locals and seeking out an authentic experience.*

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1. **Action Plan 2020/21**

**To establish Perthshire as a leading responsible tourism destination in Scotland**

* Perthshire Pledge created and established in 2020 with **X** known/listed tourism businesses working towards the criteria by 2024
* The percentage of known/listed tourism businesses participating in independently validated environmental accreditation schemes exceeds other areas in Scotland
* **Increase the number of public EV charge points across Perthshire from 35 to XXX by 2024**

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| **What** | **Lead Partners** | **Support Partners** | **When** |
| Develop a multi-agency Responsible Tourism Group with representatives from public/private sector to develop a destination plan for responsible tourism, which will encourage responsible tourism practices amongst businesses, residents and visitors. | Perth & Kinross Council/VisitScotland | Green Tourism: Perth&Kinross Countryside Trust; Scottish Natural Heritage; Forestry and Land Commission; | Q2 |
| Develop a Perthshire Responsible Tourism pledge, setting out the destination’s expectations to businesses, residents and visitors. | Perth & Kinross Council/VisitScotland | Green Tourism: Perth&Kinross Countryside Trust; Scottish Natural Heritage; Forestry and Land Commission; | Q2 |
| Devise and implement a marketing campaign to roll out the Perthshire Pledge to LTA’s and tourism industry. | Perth & Kinross Council/VisitScotland | Green Tourism: Perth&Kinross Countryside Trust; Scottish Natural Heritage; Forestry and Land Commission; | Q2 |
| Develop an industry engagement programme to educate businesses, residents and visitors on responsible tourism practices (Scottish Outdoor Access Code/CAMPA/Vehicle Rights). | Perth & Kinross Council/VisitScotland | SNH  CAMPA  Green Tourism | Q3 |
| Develop an online responsible tourism guide/toolkit for businesses, residents and visitors to improve information provision on a ‘green’ visit. | Perth & Kinross Council/VisitScotland | Green Tourism | Q3 |
| Encourage the development of new tourism products and experiences. | Perth & Kinross Council/VisitScotland |  | Ongoing |
| Establish baseline data to be used in monitoring and measuring Perthshire’s journey towards responsible tourism. | Perth & Kinross Council/VisitScotland |  | Ongoing |
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| **Quick Wins** | **Who** | **When** |
| Research competitor destinations approaches to responsible tourism | Perth & Kinross Council/VisitScotland/Industry | Q2 |
| To maximise the opportunities to demonstrate responsible practices through Year of Coasts & Waters 2020 | Perth & Kinross Council/VisitScotland |  |

**To grow the value of overnight stays by 3% by 2024**

* 3% year on year growth on 2018 baseline using existing GBTS/IPS data
* Increase % of visits occurring between October and March. See kpis
* Increase the length of domestic and international overnight stays. See kpis

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| **What** | **Lead Partners** | **Support Partners** | **When** |
| Establish a tourism monitoring framework comprised of baseline data and targets for the period 2020-2024 | Perth&Kinross Council | VisitScotland | Q2 |
| Communicate Perthshire Tourism Action Plan and tourism monitoring framework to businesses | Perth&Kinross Council | Perth&Kinross Council /VisitScotland | Q2 |
| Increase awareness of existing tourism products and experiences and support and encourage the creation of new products and experiences, aligned to the key connector themes (Culture & Creative Industries, Food and Drink, and Outdoor Adventure) that encourage length of stay and address the “off season” | Industry | Perth&Kinross Council /VisitScotland/ Scottish Enterprise | Q1 – Q4 |
| Encourage industry participation in national marketing campaigns and encourage digital marketing capabilities. | VisitScotland |  | Q1 – Q4 |
| Develop and implement the International Action Plan through a programme of travel trade activity (business briefings, trade exhibitions, familiarisation visits) | Perth &Kinross Council/ Regional Local Authority Partners | VisitScotland  /Industry | Q1, Q3, Q4 |
| Develop and implement sector specific skills training for tourism industry promoted through a Regional Tourism Development Programme, to support sector growth | PKC & regional local authority partners/VS/SE | Industry | Q1, Q3, Q4 |
| Develop a content plan for visitscotland.com in line with seasonal, events and themed years opportunities, and aligned to regional connectors | Perth&Kinross Council/VisitScotland | Industry | Q1 – Q4 |
| Develop an Events & Festivals Strategy to drive events tourism | Perth&Kinross Council | EventScotland/Industry | Q1 – Q4 |
| Develop early marketing actions regarding the development of Perth City Hall as a new cultural attraction | Culture Perth&Kinross | Perth&Kinross Council/VisitScotland | Q2 – Q4 |
| Develop and implement marketing actions for business tourism and MICE market (Note collaboration with partners in relation to the development of a new model for a regional approach to business events) | Perthshire Business Tourism Group | Perth&Kinross Council/VisitScotland | Q1 – Q4 |
| Develop and implement marketing actions for golf tourism | Golf Perthshire | Perth&Kinross Council/VisitScotland | Q1- Q4 |
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| **Quick Wins (within three months)** | **Who** | **When** |
| PKC Events & Festivals Strategy produced | Perth & Kinross Council | Feb 2020 |
| Regional attendance with industry partners at VisitScotland Expo | Perth & Kinross Council/Local Tourism Associations/Industry | April 2020 |

**To increase the impact and benefit of tourism across Perthshire’s communities**

* Tourism to contribute to improved community engagement and infrastructure
* Six-monthly community engagement activities are led by the LTA with outcomes communicated across our communities
* Increase participation/membership levels in LTA’s across Perthshire (from x to Y)

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| **What** | **Lead Partner** | | **Support Partners** | | **When** |
| Establish baseline data and targets on levels of participation and membership of Local Tourism Associations | Local Tourism Associations | | Perth & Kinross Council | | Q1 |
| Research growth potential and opportunities for Local Tourism Associations | Local Tourism Associations | | Perth & Kinross Council/ Industry | | Q2 onwards |
| Establish baseline data on employment in Perthshire and the potential for tourism to contribute to FTE | Perth & Kinross Council | |  | | Q1 |
| Explore a partnership approach to include PKC/GrowBiz/SE/Skills Development Scotland/Other) and facilitate access to training, development opportunities | Perth&Kinross Council/Scottish Enterprise  Skills Development Scotland/  Education facilities | | Industry | | Q3 onwards |
| Create a forum for Local Tourism Associations to establish links with community groups | Local Tourism Associations | | LTA’s  Industry  PKC  Community Groups | | Q2-4 |
| Identify key infrastructure personnel/organisations to develop a plan of work with LTA’s/Community  Create a resource toolkit for LTA’s to utilise in establishing greater links with community groups and residents |  | |  | |  |
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| **Quick Wins (within three months)** | | Who | | When | |
| Communicate with LTA’s for fact finding and next step organise a joint meeting with LTA’s and VS/PKC | | Steering group – MB, AW, GR, AK | | Q1 | |

**To make Perthshire a digitally discoverable and enabled destination**

* Perthshire named as a key destination in one of online travel sites (such as Lonely Planet)
* No. of businesses participated in digital tourism training opportunities (either attendance and/or views of online resources)
* 75% of tourism businesses listed on VS.com (as a sample of businesses in Perthshire) are bookable online
* Superfast Broadband/4G coverage across Perthshire

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| **What** | **Lead Partners** | **Support Partners** | **When** |
| *Maximise digital reach of destination marketing activities through increased level of involvement by industry & other partners sharing assets/content.* |  |  |  |
| 1. Development of seasonal content plan for Perthshire, in line with VisitScotland’s content plan, to capitalise on key themes (and ensure consistency in the messages). | Perth&Kinross Council/VisitScotland |  | Q2 2020 |
| 1. Headline review of key destination online channels (such as websites and social media channels) | Perth&Kinross Council/VisitScotland/Local Tourism Association |  | Q3 2020 |
| 1. Using seasonal content plan and review of channels, develop guidelines/plan for destinations and businesses to most effectively promote destination online. | VisitScotland | Perth&Kinross Council / Industry | Q3 2020 |
| 1. Deliver Promoting Perthshire industry event in Spring or Autumn 2021 which shares how the destination is being promoted by partners across a series of channels. | VisitScotland | Perthshire Tourism Partnership | Q2 2021 |
| *Strengthen digital performance of Perthshire as a destination by increasing digital capabilities of Perthshire tourism businesses.* |  |  |  |
| 1. Drive uptake and promote engagement in digital tourism training resources, through workshops where possible and Digital Tourism Scotland online resources (linked to objective 2). Identify opportunities for businesses requiring basic, intermediate and more advanced support. | Perth&Kinross Council/GrowBiz/Business Gateway | VisitScotland / Tay Regional partners | Q1 2021 |
| 1. Develop a series of tracking measures which collectively show whether more businesses are becoming digitally enabled (such as web-booking enabled % on VS.com; no. of OTAs listings; verified Google listings) | Leadership Group/ VS/PKC/ |  | Q3 2020 |
| 1. Continued efforts to track visitor sentiment (via Scotland Visitor Survey 2020) and business sentiment (via VS Tourism Industry Barometer quarterly). Should opportunities or resources arise, consider more effective options. | Perth&Kinross Council/VisitScotland | All | Q1 2021 |
| 1. Monitor implementation of Superfast broadband (and other related network activities) and ensure LTA and other tourism business networks are kept up to speed on developments |  | Perth&Kinross Council/Perthshire Tourism Partnership |  |
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| Resources: | | | |

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| **Quick Wins (within three months)** | **Who** | **When** |
| 1.1 Development of seasonal content plan for Perthshire, in line with VisitScotland’s content plan, to capitalise on key themes (and ensure consistency in the messages). | Perth&Kinross Council/VisitScotland | Q2 |
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1. **Monitoring Framework (Insert all KPIs)**

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| **Headline Indicators** | | | | |
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| **Indicator** | **Source** | **Baseline** | **Year** | **Ambition 2024** |
| Value of Overnight Visits (UK & International) to increase | GBTS & IPS | £185m | 2016-18 Average | £220m |
| Average expenditure per visitor per day to increase | GBTS & IPS | £74 (UK)  £95 (International) | 2018 | £86 UK  £113 International |
| Seasonality –  percentage of visits occurring between October and March to increase | GBTS & IPS | 42% of visits (UK)  22% of visits (International) | 2016 – 2018 Average | 45% of visits (UK)  25% of visits (International) |
| Average length of overnight stays to increase | GBTS & IPS | 3.3 nights (UK)  3.1 nights (International) | 2018 | 3.5 nights (UK)  3.3 nights (International) |
| Annual Average Occupancy Levels in Hotel Accommodation | VisitScotland Occupancy Survey | 59% (room occupancy) | 2018 | 65% (room occupancy) |
| Annual Average Occupancy Levels in Guest House/B&B Accommodation | VisitScotland Occupancy Survey | 35% (room occupancy) | 2018 | 40% (room occupancy) |
| Annual Average Occupancy Levels in Self-Catering Accommodation | VisitScotland Occupancy Survey | 46% (unit occupancy) | 2018 | 50% (unit occupancy) |

**Appendix 1:**

**Consultation Process**

The Future of Tourism Industry Workshop – 19 September 2019

Perthshire Tourism Action Plan/Strategy Development Workshop 1 - 23 October 2019

Perthshire Tourism Action Plan/Strategy Development Workshop 2 -19 November 2020

Perthshire Tourism Action Plan/Strategy Development Workshop 3 - 18 December 2020

Perthshire Tourism Action Plan/Strategy Development Workshop 4 – 29 January 2020

Perthshire Tourism Action Plan Draft – 29 February 2020

Industry Consultation – 31 March 2020

Perthshire Tourism Action Plan Launch Event - TBC

**Appendix 2**

**Consultees – Do we have approval to print these/did not ask at the outset?!**

**Appendix 3**

**Map**

**Appendix 4**

**References**

Beyond 2020. National Tourism Strategy

<https://scottishtourismalliance.co.uk/draft-strategy/>

Tay Cities Regional Tourism Strategy

<https://www.taycities.co.uk/sites/default/files/tay_cities_region_tourism_strategy_-_final_version_july_19.pdf>

[www.taycities.co.uk/publications](http://www.taycities.co.uk/publications)

**Perth & Kinross Community Plan**

Tay Cities Regional Skills Investment Plan.

<https://www.skillsdevelopmentscotland.co.uk/media/45888/final-skills-investment-plan-tay-cities-region.pdf>

Perth & Kinross Council Tourism Action Plan. **No Link**

Perthshire Tourism Partnership

<https://www.investinperth.co.uk/key-sectors/tourism/perthshire-tourism-partnership/>

Perthshire Insights

<https://www.visitscotland.org/research-insights/regions/perthshire>)

Scottish Accommodation Occupancy Data

<https://www.visitscotland.org/research-insights/about-our-industry/accommodation>

Local Tourism Industry Barometer Results

<https://www.visitscotland.org/research-insights/about-our-industry/industry-barometer>

**Megatrends impacting Scottish tourism to 2025**

<https://scottishtourismalliance.co.uk/megatrends/>

Insights Trends 2019

<https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/insights-trends-2019.pdf>

<https://www.visitscotland.org/research-insights/trends>

VisitScotland UK Market Segmentation

<https://www.visitscotland.org/research-insights/about-our-visitors/uk>