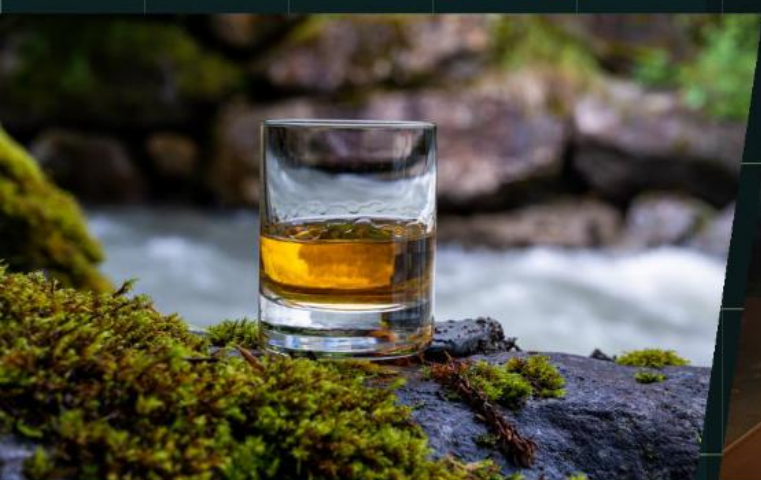


Perth and Kinross

# TOURISM STRATEGY & ACTION PLAN



2025–2030

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## Introduction

The Perth and Kinross Tourism Strategy and Action Plan 2025 – 2030 has been shaped by a diverse, cross-section of the area’s tourism industry, and delivered on their behalf by Perthshire Tourism Partnership. Perthshire Tourism Partnership was established to bring together tourism associations, stakeholders and public sector organisations based in Perth & Kinross to discuss strategic themes relating to tourism in the region. The partnership is comprised of:

PERTSHIRE TOURISM PARTNERSHIP	Blairgowrie and East Perthshire Tourism Association	Perth & Kinross Heritage Trust
	Cairngorms Business Partnership	Perth Theatre and Concert Hall
	Cairngorms National Park Authority	Perth Traders Association
	Culture Perth & Kinross	Perthshire Business Tourism Group
	Dunkeld and Birnam Tourism Association	Perthshire Chamber of Commerce
	Glenshee and Strathardle Tourism Association	Perthshire Regional Food Group
	Historic Environment Scotland	Perthshire Tourism Partnership
	Kinross Partnership	Pitlochry Partnership
	Loch Lomond and Trossachs National Park	Rannoch and Tummell Tourist Association
	National Trust for Scotland	Scottish Agritourism
	Perth & Kinross Council	Visit Aberfeldy
	Perth & Kinross Countryside Trust	

Designed to be a working and flexible document, the plan sets out a vision for the next five years and outlines the partner commitments and areas of investment required to ensure its success. Strengthened by a detailed action plan, the strategy provides clear KPIs, and a delivery framework consisting of four key pillars.

- Area promotion and destination marketing
- Investment and infrastructure
- Market development and internationalisation
- Industry growth and resilience

## About Perth and Kinross



With a population of 151,000 residents and a geography spanning city, towns, and countryside, Perth and Kinross consistently ranks among the UK's top places to live and work. It is renowned as a major events and festivals destination, with over 500 annual events.

At its heart, the River Tay sets the scene for the area's magnificent outdoor offering, which encompasses 28 Munros, 48 lochs, 16 rivers and 2000sq miles of glorious Scottish countryside. This profusion of natural assets has become the picture-perfect backdrop for a host of businesses and activities including paddleboarding, kayaking, canoeing, fishing, walking and hiking.

Affectionately named 'Big Tree Country' due to the great seed collector David Douglas who travelled the world in the 1800s, the area also boasts spectacular off-road playgrounds for gravel and mountain biking enthusiasts, as well as the 2023 UCI Cycling World Championships Gran Fondo road cycling route.

Perth was accredited as a UNESCO City of Craft and Folk Art in 2021, firmly embedding its commitment to culture into sustainable development and policy making. In the last decade Perth and Kinross Council has invested £50m+ in cultural and heritage infrastructure in Perth City Centre including the £27m refurbishment of the historic Perth Museum.

The area boasts an international reputation as a food and drink destination. This has been influenced in no small way by its whisky heritage, Michelin Star restaurants, and multiple award-winning chefs and menus. Building on these strong foundations, Perthshire has also built a strong agritourism sector, with direct-to-consumer produce, farm shops, restaurants and accommodation.

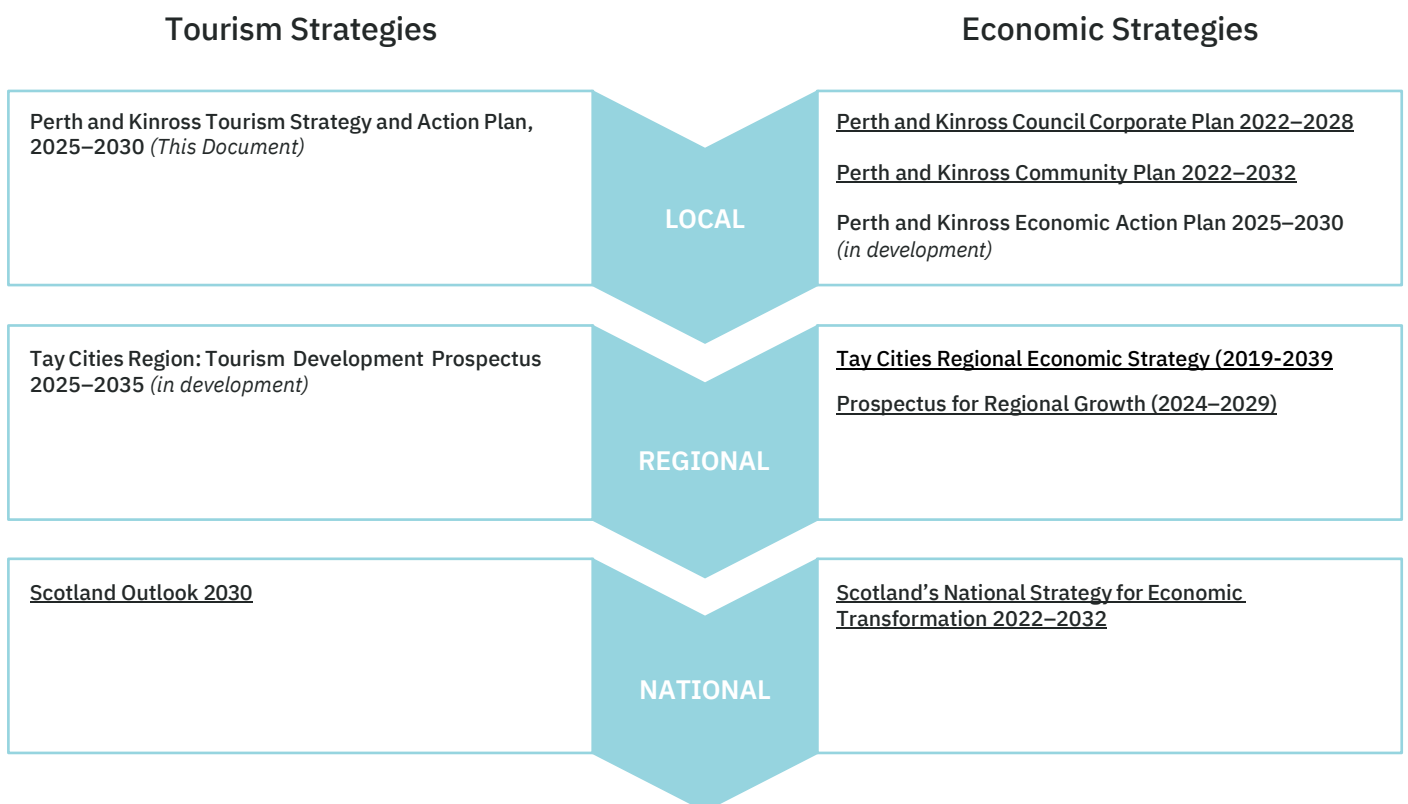
## Background and Strategic Context

The first Perthshire Tourism Action Plan (2021–2025) was developed and published in 2021 following extensive consultation with the Perthshire Tourism Leadership Group and the wider industry. The plan was developed with a focus on recovery following the pandemic and identified priorities and actions for all stakeholders.

Following a mid-term review in 2023, it was agreed that from 2025 onward, a 5-year horizon would be used, to align with the Perth and Kinross Economic Action Plan 2025-2030. This would enable a long-term strategic framework and action plan to be established in line with national and local strategies (listed below), and in turn, ensure that visitor sector growth worked to support the goals and ambitions of the area and its residents.

Using local and national strategies to inform and shape this 5-year plan, was crucial in ensuring the industry was aligned to current economic drivers, and national objectives. During this research process, several key themes emerged, particularly in relation to developing a sustainable economy, reducing inequalities, and delivering a net zero Scotland by 2045. With this in mind, this new strategy has been developed with responsible tourism at its core and with due consideration towards the Visitor Levy (Scotland) Act, which was passed in May 2024.

## Strategies: How they all fit together



## Vision

By 2030, tourism will play a greater role in Perth & Kinross by supporting an inclusive, international and connected visitor economy.

## Mission

To work collaboratively to strengthen tourism in Perth & Kinross, ensuring year-round visits, increased stays, and a continued commitment to delivering quality visitor experiences for all.

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## Strategic Objectives

- **Area promotion and destination marketing:** Aim to drive up visitation to our area from identified audiences, increasing day visitors and overnight stays, as well as the length of stay and visitor spend
- **Investment and infrastructure:** Aim to attract inward investment to enhance the visitor experience in the destination, as well as manage the impact on our communities
- **Market development and internationalisation:** Aim to build on investment to date in key assets, developing new tourism products and visitor experiences
- **Industry growth and resilience:** Aim to develop a sustainable visitor economy through supporting businesses to grow, increase levels of well-paid jobs and build their resilience in a challenging operating environment

## Area Performance

2.3m

tourism visits to  
Perth and Kinross  
in 2023

5m

visitor days and  
nights generated by  
visitors in 2023

2.8 nights

was the average  
length of stay in  
the area

1.5m

visits were made by visitors  
staying within the area,  
generating 1.2 million nights  
in local accommodation

685

tourism businesses  
were registered in  
Perthshire in 2024

£641m

total economic impact

+8.8%

Increase in economic impact

2023

+15.4%

Increase in visitor numbers

2023

+1.5%

Increase in total visitor  
days and nights

2023

## Understanding the Audience

Understanding who is visiting Perthshire, where they are visiting from, and what their reasons for visiting are, is pivotal to sustainable growth. There are two aspects to understanding our visitors, through the results of Scotland's Visitor Survey and through analysing Visitor Trends.

VisitScotland commissioned Progressive Partnership to clarify and enhance the overall understanding of visitor attitudes and behaviours. The survey explored all aspects of the overnight visitor experience to Scotland, providing valuable insights into the sector. It was restricted to leisure only.

Perthshire as a whole:

- 68% of overnight visitors to Perthshire were domestic.
- 32% of overnight stays in Perthshire were international.
- 77% of Scotland visitors who stayed overnight in Perthshire were repeat visitors.

Perth City Centre only:

- 57% of overnight visitors to Perth were domestic.
- 43% of overnight stays in Perth were international.
- 67% of Scotland visitors who stayed overnight in Perth were repeat visitors.

Notably most visitors to Perthshire (79%) were older independents or of retirement age. 13% were families.

Overnight tourism statistics for 2023 show that domestic (GB) markets made up circa 85% of all visits and 79% of expenditure. International markets made up almost 15% of visits and 21% of expenditure.

Within the domestic market, Scotland's residents made up 60% of visitors, with the key regions outside of Scotland being London (10% of trips) and the Northwest (9%). Top international markets for Perthshire in 2023 were the USA (27%), Netherlands (12%), Spain (10%), France (8%), Italy and Australia (7% each).

[More information](#)

# Opportunities for the Visitor Economy in Perth and Kinross

Consumer trends are key to informing investment decisions for sustainable growth. The VisitScotland Insights Team have produced tourism trend papers for the last decade. They consolidated their work on tourism trends and highlighted trends from the past that remain relevant today in the document [‘A Decade of Consumer Trends’](#), published in February 2024.



## Transformational Tourism

This is a shift amongst consumers to travel with a sense of purpose and for trips to be meaningful.

Visitors want to maximise their time in a destination, staying longer, and giving something back to the destination they are visiting through e.g. voluntourism, learning of new skills or achievements. Examples include:

- Voluntourism (Waterway clear ups/litter Picks)
- New skills/skill sharing
- Craftsmanship. Learning traditional crafts on holiday
- Achievements (Munro bagging or sports challenges)



## Wellness

This is a trend amongst consumers to focus on self-care, nurturing their physical/mental wellbeing.

Tourism has the potential to create a mental space where people can relax and focus inward whether that is through reconnecting with nature, agritourism experiences, sleep tourism experiences, phone-free areas, forest bathing or wild swimming. Examples include:

- Wild swimming
- Forest bathing
- Silent retreats/meditation & mindfulness
- Water therapy (blue spaces)
- Sleep tourism experiences
- Sleep technology
- Digital tree experiences

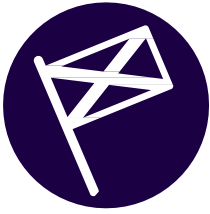


## Conscious Traveller

This is a trend towards considering the impact of travel on the environment and considering opportunities to offset the carbon footprint of travel.

Part of this has been a rise in train travel above taking short haul flights, or a mix of flights and train travel with new train routes being developed or re-instated. This is referred to as locomotional travel. Examples include:

- Off grid accommodation and longer stays
- Localism/shop local
- Increased train travel / train experiences
- Eco-drive



## Distinctive Scotland

This is a trend towards drawing on our rich history and heritage to portray a unique and distinctive visitor experience in Scotland.

The focus on the past has seen a rise in storytelling to create dark tourism experiences, reading tourism referred to as 'novolesiure' and visits to specific film locations. Examples include:

- Dark tourism, drawing on our dark history and heritage
- Screen tourism and visiting film locations
- Reading tourism and visiting locations in literature
- Storytelling
- Nostalgia, revisiting childhood places, passing on positive memories



## Changing Traveller

This trend has emerged following the increase in flexible working patterns post pandemic.

The line between business and pleasure has become increasingly blurred and expectations are such that accommodation providers are looking to design their offering to facilitate longer term stays, and to provide seamless connections between work and leisure

Examples include:

- Solo travel
- Workcations, combining leisure & business

## Governance, Delivery & Reporting

The Perth and Kinross Tourism Strategy & Action Plan 2025–2035 will be delivered by Perthshire Tourism Partnership and partners. Meetings will be held quarterly to monitor progress. The group will review the action plan annually to ensure alignment to national and local strategies and a delivery report will be published thereafter with an update on progress provided to the Perth and Kinross Economy and Infrastructure Committee.

While it is recognised that time and resources are already stretched, without coordination the combined benefits of a partnership approach may struggle to be realised. The group will therefore continue to consider options to support tourism leaders, and to realise the full potential of the local tourism associations (LTAs), the collaborative groups, and their members.

## Action Plan



### Area Promotion and Destination Marketing

- No of day visitors
- No of overnight visitors
- Occupancy Levels
- Economic impact
- Visitors spend.



### Investment and Infrastructure

- Increase levels of investment



### Market Development and Internationalisation

- No of international visitors
- Visitors spend by international markets.



### Industry Growth and Resilience

- KPI Total Employment
- Rate of start ups
- Business closures

## Pillar 1: Area Promotion and Destination Marketing

**Objective:** Aim to drive up visitation to our area from identified audiences, increasing day visitors and overnight stays, as well as the length of stay and visitor spend

ACTION	LEAD PARTNER	SUPPORT
Options appraisal for a delivery mechanism to deliver on a year-round Destination Marketing Strategy for leisure & business tourism, considering costed options for delivery	Perth and Kinross Council	
Develop a Destination Marketing Strategy to outline tactics and channels to improve communication with identified audiences, promoting new tourism products and visitor experiences	Perth and Kinross Council	VisitScotland
Review and refresh Perth and Kinross visitor audience profiles in line with national profiling data. Consider conducting a Perthshire-wide visitor survey and consumer sentiment analysis	Perth and Kinross Council	VisitScotland
Continue to support the development of Perthshire Box Office (PBO) which offers a centralised online, telephone and in-person ticketing service for the culture, heritage, and tourism sectors in Perth and Kinross, acting as a one-stop shop for all forms of event booking	Perth and Kinross Council	Perth Theatre & Concert Hall
Use awards, media credits and accreditations to acknowledge Perth and Kinross's aim to be a 'leading sustainable tourism destination'	Perth and Kinross Council	VisitScotland
Engage with businesses to strengthen the online discoverability of Perth and Kinross by increasing the digital capabilities of businesses. Engage with Online Travel Agents (OTAs) platforms to increase the number of businesses listed and distributing products/experiences online	Perth and Kinross Council	VisitScotland / Business Gateway
Engage with travel media, travel journalists, writers and influencers to amplify the profile of Perth and Kinross, building on the newly created Perth City Narrative	Perth and Kinross Council	VisitScotland
Develop and deliver on an 'International Travel Trade Sales Action Plan' focused on intermediary marketing (to include attendance at trade events, delivery of familiarisation trips, sales assets and new content creation)	Tay Cities Regional Tourism Development Group	VisitScotland; VisitBritain; UK Inbound; ETOA; Coach Tourism Association
Continue regional collaboration through Tay Cities Regional Tourism Development Group comprised of Angus Council, Dundee Council, Fife Council, Perth and Kinross Council and VisitScotland working together to promote Tay Country using the regional connector themes of food & drink, culture & creative and outdoor adventures	Tay Cities Regional Tourism Development Group	
Develop a model for the continued attraction of business events (meetings, incentives, conferences and events – MICE) into the area. Explore options such as the existing model, or a convention bureau-lite. Work with VisitScotland's Business Events Team to showcase MICE-ready venues to buyers and to develop local ambassadors who can attract MICE events	Perthshire Business Tourism Group (Meetings Perthshire)	VisitScotland Business Events Team
Develop a strategic approach to Perth and Kinross's event portfolio (major, civic and community), to allow for the sustainability of existing events (and maximising their local impact), identifying a pipeline of major events which Perthshire can bid for	Perth and Kinross Council	VisitScotland
Maximise the opportunities of the UNESCO City of Craft & Folk Art designation and UNESCO Creative Cities Network to develop and promote craft experiences in the destination	Culture PK	Perth and Kinross Council
Explore the possibility of a Visitor Levy Scheme for Perth and Kinross	Perth and Kinross Council	

## Pillar 2: Investment and Infrastructure

**Objective:** Aim to attract inward investment to enhance the visitor experience in the destination, as well as manage the impact on our communities

ACTION	LEAD PARTNER	SUPPORT
Support delivery partners with new rural and countryside access product developments, such as Perth and Kinross Countryside Trust with development of infrastructure on the River Tay Way long-distance walking route, CATERAN TRAIL, SNOW ROADS and DRUMMOND HILL (welfare facilities/signage and wayfinding, and interactive/educational interpretation)	Perth and Kinross Council	Perth and Kinross Countryside Trust
Deliver on the Strategic Tourism Infrastructure Development Plan which evidenced the need for inclusive and accessible visitor infrastructure investment in Integrated Parking Development Solutions	Perth and Kinross Council	Public, Private and Third Sector Partners
Develop a series of designated investment areas in town centres in rural areas where there is an opportunity for regeneration (following similar model of Perth City Centre Development & Design Framework)	Perth and Kinross Council	Public, Private and Third Sector Partners
Build on existing best practice models such as the River Tay Way Hub to develop a network of hubs which co-locate toilets / accessible toilets / changing places toilet / showers / changing rooms / bike shelters / bike maintenance points	Perth and Kinross Council	Perth and Kinross Countryside Trust / Various Delivery Partners
Develop a strategic waste disposal network up the A9 corridor for campervans/motorhomes in the area utilizing public/private sector assets	Perth and Kinross Council	PKC Waste Services Team
Consider visitor management through a multi-agency approach at 'hotspot' areas and develop tactics to encourage dispersal of visitors to lesser-known areas where there is capacity	Perth and Kinross Council	PKC Visitor Management Team / Economic Development
Work with partners delivering active travel routes to improve active travel provision for visitors	Perth and Kinross Countryside Trust	PKC Transport Planning (Mobility Strategy)
Explore on-demand transport services to start of key walks within Perth and Kinross to allow access to countryside without a car	Perth and Kinross Countryside Trust	PKC Transport Planning (Mobility Strategy)
Support delivery partners such as Scottish Cycling with development of infrastructure for cyclists such as secure bike parking facilities and route development building on the UCI Gran Fondo legacy	Scottish Cycling	PKC Economic Development Team
Explore the possibility of a Visitor Levy Scheme for Perth and Kinross	Perth and Kinross Council	

## Pillar 2: Investment and Infrastructure

**Objective:** Aim to attract inward investment to enhance the visitor experience in the destination, as well as manage the impact on our communities

ACTION	LEAD PARTNER	SUPPORT
Capital investment programme to develop a series of designated investment areas in the City Centre where there is potential to effect change, underpinned by a series of streetscape enhancements and property improvements. This includes works within the Cultural Quarter, Mills Quarter and directly within the City Centre including developments to the vennels and lade	Perth and Kinross Council	
Enhance operational services within the urban areas, maintaining and enhancing cultural and heritage assets. This aims to cover services such as enhanced safety measures, enhanced cleansing, graffiti removal, lighting in vennels, and measures towards environmental sustainability	Perth and Kinross Council	
Continue to review the visitor experience (such as wayfinding and signage) in towns and Perth City to ensure an improving visitor experience	Perth and Kinross Council	
Explore the possibility of a Visitor Levy Scheme for Perth and Kinross	Perth and Kinross Council	

## Pillar 3: Market Development

**Objective:** Aim to build on investment to date in key assets, developing new tourism products and visitor experiences

ACTION	LEAD PARTNER	SUPPORT
Support and encourage collaboration and packaging of our tourism offer through closer working between businesses in food & drink; culture & creative; and outdoor adventure sub-sectors	Perth and Kinross Council	Perthshire Tourism Partnership
Use the Perth and Kinross event portfolio as a catalyst for market development including supplier opportunities and new visitor experiences at events	Perth and Kinross Council	
Develop and deliver on an international travel trade sales action plan (to include attendance at trade events, delivery of FAM trips, sales assets and new content creation)	Perth and Kinross Council	Tay Cities Regional Tourism Development Group
Promote outdoor providers and guides who can offer responsible specialist tours away from main tourist hotspots	Perth and Kinross Council	VisitScotland
Develop outdoor assets such as long distance walking and cycling trails eg the River Tay Way, Catevan Trail, and Perthshire Gravel Trails. Work with partners to develop and sustain trails. Consideration to routes for adaptive cycling	Perth and Kinross Countryside Trust	Highland Perthshire Cycling; Tayside Trails Association; Perth and Kinross Countryside Trust
Develop outdoor assets for our waterways, such as access for watersports and clean waterways projects	Paddle Scotland	
Develop bookable food & drink experiences through product development workshops, drawing on current tourism trends	Regional Food Group (Great Perthshire)	
Develop Perth and Kinross-wide food & drink itineraries or online guides for towns to promote foodie visitor experiences to consumers	Regional Food Group (Great Perthshire)	
Develop products for niche tour operators for cultural, craft, heritage, design, architecture, and conservation experiences e.g. Jacobites Tour, Mythology Tour, Cultural Tour, Royal Connection Tour. This is with the aim of encouraging and increasing international markets	Perth and Kinross Council	Culture PK
Leveraging the UNESCO City of Craft and Folk Art designation, develop cultural/craft/creative tourism products and inclusive visitor experiences which can contribute further to attracting identified audiences	Perth and Kinross Council	UNESCO; VisitScotland
Explore and activate partnerships/opportunities with national arthouses/brands Tate, Jupiter Artland, and V&A	Perth and Kinross Council	Culture PK
Explore and activate partnerships with national agencies Creative Scotland, Museums & Galleries Scotland, and Traditional Arts & Culture Scotland	Perth and Kinross Council	Culture PK
Explore and create a programme of major cultural/craft/creative events the City can bid to host: UK City of Culture; Turner Prize; Museums + Heritage Awards; Art Fund; immersive art experiences; and site-specific theatre	Perth and Kinross Council	Culture PK
Explore the possibility of a Visitor Levy Scheme for Perth and Kinross	Perth and Kinross Council	

## Pillar 4: Industry Growth and Resilience

**Objective:** Aim to develop a sustainable visitor economy through supporting businesses to grow, increase levels of well paid jobs and build their resilience in a challenging operating environment

ACTION	LEAD PARTNER	SUPPORT
Develop and deliver sector-specific business support programmes which aim to enhance business resilience and performance (new product development, digital marketing, sustainability and inclusivity)	Perth and Kinross Council	Business Gateway / GrowBiz / Perth and Kinross Business Partnership
Support businesses with solutions to address issues specific to the tourism and hospitality sector e.g. limited transport in rural areas affecting recruitment, lack of staff accommodation, shortage of available staff, and impacts of the domestic downturn due to the cost-of-living crisis	Perth and Kinross Council	Business Gateway / GrowBiz / Perth and Kinross Business Partnership
Work with business support organisations/agencies to coordinate activities, minimising duplication of provision and achieving reach to maximise participation	Perth and Kinross Council	Business Gateway / GrowBiz / Perth and Kinross Business Partnership
Create opportunities and platforms for peer-to-peer support for businesses who seek to influence change and shape the future of tourism in Perth and Kinross, sharing ideas, best practice and knowledge	Perth and Kinross Council	Business Gateway / GrowBiz / Perth and Kinross Business Partnership
Support businesses impacted by domestic downturn with ways to sustain businesses year-round	Perth and Kinross Council	VisitScotland
Support communities with delivery of the tourism-related actions in their Local Action Groups & Community Action Plans (CAPs)	Perth and Kinross Council	PKC Funding Team / CLLD
Support volunteering/voluntourism. E.g. support Perth and Kinross Countryside Trust with educational events where PKCT deliver training for staff and volunteers interested in countryside management / becoming Rangers	Perth and Kinross Council	
Explore the possibility of a Visitor Levy Scheme for Perth and Kinross	Perth and Kinross Council	