

EXPERIENCE PERTHSHIRE TOURISM STRATEGY & ACTION PLAN 2006 – 2011

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1. Background

Introduction & Purpose of Action Plan

The tourism industry, globally, nationally and regionally, continues to grow, showing remarkable resilience by bouncing back from a number of potentially major setbacks over the last five years, including Foot and Mouth Disease, an increase in global terrorism and fluctuations in the economies of some of our main markets to retain its position as one of the most significant contributors to Scotland's economy and well-being.

Some of these crises have focused attention on the importance of a sustainable tourism industry to Scotland and highlighted an influence which extends well beyond the performance of businesses directly operating within the sector. The industry's ability to work together to deal with challenges and adapt to changing consumer trends and economic factors has contributed to it being increasingly recognised as a mainstream player in economic development. Tourism is acknowledged as being vital to the well-being of many of our communities, providing direct and indirect employment where there is often few other opportunities and encouraging pride. Environmentally, there are two faces to the industry. Tourism in Scotland is heavily reliant on the quality of our scenery natural and built heritage and it is therefore in the best interests of the industry as a whole that these qualities are protected and enhanced, giving an economic justification for investment in the environment. However, travel is a major factor in global warming and environmental damage and the industry has been slow to recognise its responsibility and the advantages of mitigating these impacts where possible through the adoption of some practical environmental practices.

Locally there has been good progress in recent years with improved occupancy levels and growth in visitor trips during the autumn and winter periods. New developments such as Perth Concert Hall and collaborative projects like Big Tree Country, Perthshire Gardens Collection and Great Scotland have all helped to enhance the profile of the area and provide new visitor experiences. Two new resort developments are currently in the early stages and we are seeing new initiatives around food and craft all of which will make important contributions in the years ahead.

But there is still scope for significant development and growth and the consensus through the consultation on this action plan has been that this area can contribute to achieving the ambition for 50% growth that the Scottish Executive has set as a challenge to the tourism industry in Scotland. It can also play an important role in fulfilling the national vision for tourism which is:

“To make Scotland one of the world's foremost visitor destinations by 2015.”

This Action Plan for the period from 2006-2011 sets out some of the key issues that need to be addressed if this area is to maximise the benefit of national growth and contribute to achieving the national vision. It will only be achieved if all those who make up the industry take ownership and work together to implement the actions identified to resolve these issues, acting as ambassadors to spread the message that Tourism is Everyone's Business to the wider community. Nationally, it is set in the context of the

National Framework for Tourism Change which in turn draws from Smart Successful Scotland and the Framework for Economic Development to ensure that there is a sound platform for the actions it sets out. Regionally and locally, it is set in the context of the Economic Development Strategy for Perth & Kinross which identifies tourism as one of the area's most important industries and a key driver for the Perth & Kinross economy. Primarily, however, it is based on the input from the industry, through workshops and discussions as well as the key agencies involved in developing and promoting tourism.

Leading the development of the plan has been the Perthshire Tourism Partnership, a partnership of private sector and public sector representatives (see appendix 1) tasked with the responsibility of monitoring the progress of tourism in Perthshire and through consultation developing an area strategy and action plan in response to the Scottish Executive's Framework for Change. The Tourism Partnership has been set up within a community planning context and reports to the Perthshire Economic Partnership which has overall responsibility for the monitoring of the Perthshire Economic Development Strategy.

The overall purpose of the Action Plan is

- To direct the allocation and prioritisation of resources towards developing and marketing Perthshire as one of Europe's best quality and most highly regarded tourism destinations, where businesses and communities prosper.
- To proactively engage all partners within the public, private & voluntary sectors and to involve them in helping to deliver key actions to grow tourism.
- To provide a clear focus and platform for informed business decisions and joint working towards common goals and objectives that will benefit individual tourism businesses, local communities, the local tourism industry and the wider economic development of the area.

Aims & Challenge

The Action Plan has been developed in response to four broad aims:

- 1. To create a vibrant year round end destination, responsive to changing customer expectations**
- 2. To build sustainable & competitive tourism businesses, committed to quality service delivery**
- 3. To influence the development of infrastructure to enable the region to meet visitor needs and compete effectively**
- 4. To implement focussed, cost effective strategies for integrated product development and marketing**

The achievement of these aims is addressed under four themed headings which also ensure that this plan is aligned with the themes in the national strategy, A Tourism Framework for Change:

- Knowing your Market – maximising the availability and use of market intelligence

- Marketing & Promotion – targeting the markets with the highest likelihood of return
- Exceeding Visitors' Expectation – providing the “wow” factor that encourages visitors to come again and recommend us to others through quality products, places and facilities which are attractive, innovative, authentic and distinctive along with top-class service. This theme also tackles a number of sub themes: Quality; People & Skills; Innovation & Product Development; Culture, Events & Sport; E-Business; Access & Transport
- Being Sustainable – achieving growth in a way which balances the needs of the economy, communities and the environment.

The challenge is to achieve the 50% revenue growth target outlined by the Scottish Executive in the Tourism Framework for Change by 2015.

The 50% growth target is based on only a 20% increase in the number of visitor trips brought about through our marketing efforts. It is anticipated that the majority of growth potential lies in providing the places, facilities and service that make up an experience which will make visitors want to stay longer spend more and tell others. The base point for measurement purposes will be the 2005 tourism value figure £354.25 million.

To meet the challenge of the 50% growth target, we will need a step change in the way we all do business, individually and together. All those involved in tourism must look to what they can do, creating Action Plans for their own business and their local area, based on the strategic guidance given in this document and on their own knowledge of local markets and product strengths. We must act as ambassadors to sell the message that tourism is everyone's business to bring about the experience of a visit to our area that will make it a must-see/must-return destination.

In addition to attracting more visitors and increasing visitor spend, the third growth element will lie in our ability as an attractive central location to attract inward investment in terms of resort and self-catering developments linked to well known brand names. Two key projects are already underway at Gleneagles West and Taymouth. Both will attract higher spending visitors to the area and will therefore provide a key opportunity for local businesses and visitor attractions. However, we must continue to seek new opportunities which will bring the growth we are aiming for.

The Market & Product Profile

The Global Context & Consumer Trends

Internationally, tourism is growing again and is on track for the World Tourism Organisation's forecast of 4-5% growth until 2020. However, there is huge competition, with over 200 countries offering a tourism product and as a result, Europe's share of this growth market is in decline. VisitScotland research on some of the world's leading tourism destinations show that they:

- Offer a wide product base and good variety of holiday experiences which offer discovery and experience as key themes;
- Target growing consumer interest in outdoor activities, cities, culture, well-being and business tourism;

- Use native/traditional culture and heritage to differentiate themselves, and use special events to boost profile;
- Make heavy use of the internet for promotion;
- Use private/public partnerships to deliver key roles;
- Depend on domestic tourism as well as the international market, and campaign to encourage tourist friendly attitudes.

To compete globally, we must learn from this and consider how we can ensure our destination fits with this profile to join the world's leaders. It is also essential that we take into account changes in consumer trends and retain flexibility to respond to a dynamic marketplace. Some of the key trends are:

- Today's travellers want:
 - customised and flexible travel to a destination within 3 hours travel time;
 - special interest holidays and special experiences;
 - an authentic experience;
 - good value for money.
- A strong trend towards shorter breaks, particularly driving the increase in popularity of city breaks.
- Visitors often want more than one experience in a trip, even a day trip, such as walking combined with retail.
- Growing interest in:
 - Good health, leading to a demand for activity breaks.
 - Breaks which offer a personal reward or well-being experience.
 - Extended education, with more demand for history and culture-related holidays.
 - Green tourism, with a growing green consumer base. France and Spain, for example, have large proportions of consumers who will pay more for environmentally friendly products.

The Scottish Context

Much of the information available on visitors to Scotland is highly relevant to our area.

- The vast majority of trips to Scotland are from the UK. 44% of trips are made by Scottish visitors, 47% are from England and Wales and only 9% by overseas visitors. The UK leisure market is worth around £2.9 billion. It is increasingly a short break market (average stay - 3.6 days). There is still room for growth, as over half the population of England and Wales have never visited Scotland.
- Overseas markets are growing faster, however, and as overseas visitors stay longer (average stay 9.3 days) and spend more – 19% of the value of Scottish tourism from 9% of the trips – they are crucial to growth. North America is the biggest overseas market and is beginning to show signs of growth again. The European markets are growing most strongly, assisted by better direct air access and the Rosyth ferry. Germany remains the largest market, followed by France, but there is growing

interest from Scandinavian markets, particularly Sweden, and Spain. The overseas leisure market is worth around £0.73 billion.

- UK and overseas business tourism is worth around £1 billion.
- Research shows that the most important factors in choice of Scotland as a leisure destination are our scenery, natural environment, the number of things to see and do, and the friendly attitude of local people. Other key findings are that:
 - 96% of visitors had their expectations met or exceeded, and 97% were likely to recommend their holiday experience to other.
 - The authenticity of the experience is vital
 - The opportunity to interact with Scots is important, especially for North Americans.
 - Common criticisms are the weather, prices/exchange rates and quality of accommodation and eating places.

The Regional Context

Tourism is a key industry for Perthshire and a major component of the local economy.

In 2005, there was 1.12m overnight visitors to the area. There were a further 888,000 day visitors, with a total visitor expenditure estimated at £354.25 million¹.

This represents around 6% of trips and expenditure to Scotland and around 6% of Perthshire's GDP. Tourism employment accounts for 7042 jobs (i.e. jobs directly involved in tourism); including indirect employment, this figure increases to 9,271. Direct employment accounts for 12% of the Perthshire workforce (58,293)². This compares with 9% tourism employment nationally, highlighting how important tourism is to the local economy

Perthshire Market Characteristics³

- UK residents account for around 91% of total trips and expenditure, overseas visitors represent around 9% of the market.
- Within the UK market, 64% of trips are taken by Scottish residents whilst 32% of visitors are English.
- In terms of the Scottish market, visitors to Perthshire come from: Greater Glasgow & Clyde Valley; Edinburgh & Lothians; Aberdeen & Grampian; Angus & Dundee; Argyll, Stirlingshire and Fife.
- English visitors mainly reside in: The North (Cumbria, Durham, Northumberland, Tyne & Wear), North West (Cheshire, Greater Manchester, Lancashire, Merseyside), North East (Yorkshire), South East (Hampshire, Kent, Isle of Wight, Surrey, East Sussex, West Sussex) and the Midlands.
- Within the overseas market, European visitors account for 60% of trips, with France (19%) and Germany (15%) being the main generating countries.

¹ Scottish Tourism Economic Activity Monitor, 2005

² As above

³ United Kingdom Passenger Survey, 2003 & International Passenger Survey, 2003

North American visitors make up around a quarter of the market. Canada is also an important source of overseas visitors.

- Over half (60%) of UK visitors stay in the area for 1-3 nights and the average length of stay is 3.4 nights. 30% of UK residents stay in Perthshire for 4-7 nights and only 10% stay 8 nights or more.
- UK visitors spend around £182 per trip and £53 per night.
- Overseas visitors stay an average of 6.7 nights in the area and spend around £65 per night, resulting in a total spend of £433 per trip.
- Perthshire attracts a greater proportion of holiday visitors than Scotland as a whole (77% vis-à-vis 64%).
- 77% of UK visitors come to the area for a holiday or leisure purposes, 12% to visit friends/relatives and 10% for business reasons.
- 63% of overseas visitors come to the area for a holiday and 18% to visit friends and relatives. 12% of trips are business-related.
- Around 38% of trips by UK visitors are taken between July-September; 27% between April-June; 18% between October-December; and 17% between January-March.
- Over half (62%) of trips by overseas visitors occur between July-September.

Profile of Visitors to Perthshire

- Primary research undertaken by VisitScotland consistently finds that Perthshire attracts older visitors – 69% are in the 45+ category
- Visitors predominantly fall within the higher socio-economic ABC1 category (69%).
- The main lifecycle segment attracted to the area is Empty Nesters (couples, aged 45+ years, no children in party), although European visitors are younger on average.
- The scenery is the major pull factor, but Perthshire also appeals because the area is easily accessible, good for touring, has a strong history and heritage and a wealth of attractions. Research also finds that visitors to Perthshire enjoy good food and drink (particularly local produce), visiting gardens and shopping whilst on holiday.
- Interaction with the environment is a key element of the visitor experience. Walking is the number one activity undertaken by visitors to the area. Golf, cycling, angling and adventure sports also have appeal to niche markets.

The Perthshire Tourism Product

There are currently 663 businesses with a Quality Assurance rating in Perthshire and it is estimated that this represents the majority of our core accommodation and Visitor Attraction businesses. This breaks down as follows:

82 Visitor Attractions;
286 serviced providers;
262 Self-Catering Operators;
20 Holiday Parks;
10 Hostels;
2 Caravan Holiday Homes.

Participation in Quality Assurance is high in comparison to other areas and our average star grading is 3.3, higher than the national average of 3.1. In addition we have 141 businesses in Walkers Welcome; 133 in Cyclists Welcome and 48 in the Green Tourism Business Scheme.

Uniquely the area features a number of quality destination resorts including Gleneagles, Crieff Hydro, Hilton Dunkeld and also timeshare resorts including Glenmore, Kenmore Club, Moness Country Club, Duchally Country Estate, Loch Tay Highland Lodges and Loch Rannoch Highland Club. New timeshare developments planned at Gleneagles, Duchally, Loch Tay and Taymouth Castle will strengthen our foothold in this market.

Noteable changes to the accommodation base have also been evident over the last five years including new bunkhouse facilities and a marked increase in the provision of travel lodges and budget hotels. The latter providing increased competition to the bed and breakfast and guest house sectors. It should also be noted that there has been a marked increase in the provision of self-catering accommodation across the region and agencies will need to ensure that best advice is given to new business start ups in this market to ensure we don't have a situation of over supply.

The product is still very seasonal with the majority of visitor trips happening between April – September, 38% in comparison to 30% nationally. Average room occupancy in 2005 was as follows:

59% Hotels; 44% Guest House and Bed & Breakfast; 62% Self-catering; 37% Caravan and Camping. Self-catering occupancy is the only sector where occupancy is higher than the national average (+7%). In all sectors there is a positive relationship between Quality Assurance awards and occupancy (i.e. the more stars, the higher the occupancy). Occupancy has increased year on year since 1998 within both the self-catering and bed & breakfast/guest house sectors. Hotel occupancy has remained consistent with only small fluctuations.

The Perthshire tourism product is heavily reliant on its beautiful scenery, a traditional Scottish mix of mountains, forests, lochs and river which has now been encapsulated in to the successful "Big Tree Country" positioning. It has a long tradition in tourism which can be seen in the well-established networks of attractive rural towns and villages offering a good range of tourist services and facilities, some of which, like Pitlochry have become popular leisure destinations. The primarily rural nature of the area has led to a strong focus on activities, both informal, especially walking, and a cluster of formal activity businesses (circ 40) which became the catalyst for Scotland's first Adventure Pass. The area boasts over 200 miles of interlinked footpaths. Fantastic opportunities for world class fishing; field sports; 40 golf courses; over 10 gardens; is home to classic Scottish wildlife; a wide range of home grown high quality produce saleable via a growing number of farm shops and farmers markets; a wide range of local art and craft makers.

Perth is the key service centre for the area and offers a unique mix of specialist retail as well as High Street retail. The city also benefits from a vibrant events calendar and established city centre markets. Regeneration projects, including the forthcoming City Hall development will be a catalyst for change and strengthen our City offering in the

coming years. Perth is also a popular business tourism destination catering for the variety of conference, meeting and incentive markets.

Perth Concert Hall, Perth Theatre and Pitlochry theatre will continue to play a key role in the expansion of the area's cultural offering.

A strong annual events calendar also enhances the area's cultural offering. The development of a new Event Strategy for the area will also ensure that we continue to strengthen our visitor offering. The four aims of the new strategy are:- 1) To bring valuable economic benefit to Perth & Kinross through the staging of major events. 2) To heighten the profile of Perth & Kinross nationally and internationally through a portfolio of events which reflect the Perthshire Brand. 3) To create an environment which nurtures and supports events. 4) To enhance the quality of life of Perth & Kinross as a place to live, work and visit.

There are around 70 visitor attractions operating in the Perthshire area, 32 of which participate in the Visitor Attraction monitor and provide monthly visitation data for monitoring purposes. In 2005 a total of 1,295,322 visits were recorded by the 32 participating attractions. This represents around 3.2% of visits to Scottish attractions recorded in the survey overall, total sample of 684 attractions. The visitation profile is highly seasonal in nature Jan-March 9%; April-June 31%; July-Sept 47% and Oct- Dec 13%. Jan-March and Oct-Dec showed modest growth in 2005 compared with 2004. However, many of our top attractions continue to be closed for the large part of the winter and therefore we are unlikely to see this seasonal picture change significantly unless attractions are willing and able to consider winter opening. Total visitor numbers in 2005 were down on 2004 levels by 2.9%. Competition from new activities and special interest niche markets means that traditional attractions need to be more creative and innovative in their approach in looking for ways to add value to the visitor experience and linking with other providers will be vital in building competitive advantage. This is particularly true for attractions charging an admission fee.

Formal attractions are principally focused around Pitlochry, Aberfeldy, Crieff and Perth. However it is also fair to say that our many towns and villages are attractions in themselves because of the quality of their built environment and the range of services they offer. Individual attractions generally are located as central features within a surrounding high quality scenic environment or in buildings of architectural or historic interest; Queens View Visitor Centre; The Hermitage, House of Bruar, Blair Castle; Crieff Visitors Centre; Famous Grouse Experience; Stuart Crystal; Edradour Distillery, Scone Palace, Perth Race Course, Dewars World of Whisky, The Scottish Crannog Centre.

Approximately 50 Perthshire businesses, Hotels and Conference venues are active within the Business Tourism market. The average Business Tourism event in Perthshire is for 50-100 delegates with the majority of conferences coming from corporate companies or the association sector. With the arrival of the new Concert Hall we now have the potential to attract larger 200+ delegate conferences. The corporate incentive market (focusing on staff and customer development activity) is also very important to the area and we have a number of attractive venues and providers who cater very well for this market e.g. Blue Sky Experiences; Famous Grouse Experience; Crieff Hydro; Gleneagles Hotel; Hilton Dunkeld; Ballathie House Hotel; Perth Racecourse; Highland Adventure Safari's.

2. The Action Plan 2006 - 2010

The context set out above has been used to guide discussions on what can be done to work towards the 50% growth target and achieving the local aims. The key issues and opportunities for the area have been grouped under the four themed headings which set the action plan framework which follows. The action plan includes timescales for each activity, short (1/2 years); medium (3-4 years); Long, 4 + years.

Theme 1 - Knowing Your Market

Opportunities

- We operate in a highly competitive environment where marketing is becoming more and more sophisticated. Resources must be effectively targeted to attract and retain the market segments who are most likely to visit and will have most economic impact. To do this we must understand those markets – what they're looking for, how they find out about us and how they buy from us.
- Tourism businesses deal with visitors every day and have the opportunity to gather the market intelligence which is needed to target resources and to grow their own business. There is an opportunity to capitalise on this and greatly strengthen the information we have available to us. Embracing good customer relationship management techniques is essential to improving the return on our marketing investment.

Theme 1: Knowing Your Market

Opportunity	Specific Activities	Target	Delivered By	Timescale Short term Medium term (Med) Long term
<p>Business operators and public sector agencies to become more involved in gathering intelligence about their visitors, including profiling information, levels of satisfaction and future requirements</p> <p>Supports Aims, 1, 2, 3 & 4</p>	<p>Establish and promote participation in cost effective means of benchmarking business performance to enable businesses and public sector agencies to monitor strengths, weaknesses, value for money and identification of best practice.</p>	<p>20% of businesses engaged in performance monitoring programmes</p>	<p>Scottish Enterprise/ Private Sector</p>	<p>Med</p>
	<p>Provide businesses with guidance on key visitor profiling and evaluation questions to use. Encourage adoption of technology to record and analyse visitor information e.g. Knowat.</p>	<p>Estb baseline of number of businesses using customer feedback mechanisms and set 5 year target.</p>	<p>Scottish Enterprise/ VisitScotland/ Perth College</p>	<p>Short</p>
	<p>Make available research on consumer trends and market opportunities and encourage all businesses to proactively use to plan marketing and product improvements. Communicate to businesses via network events; e'newsletters; printed publications</p>	<p>Quarterly communications</p>	<p>VisitScotland Scottish Enterprise Perth College</p>	<p>Short</p>
	<p>Participate in the new Tourism Research Network to ensure research gaps are filled and information provided by the network meets business needs.</p>	<p>Annual representation to the network of Perthshire requirements</p>	<p>VisitScotland/Scottish Enterprise</p>	<p>Short</p>
	<p>Increase participation in national monitoring programmes, e.g.</p>	<p>Minimum of 20% increase in participation</p>	<p>VisitScotland/ Private Sector</p>	<p>Short</p>

Opportunity	Specific Activities	Target	Delivered By	Timescale Short term Medium term (Med) Long term
	accommodation and visitor attraction barometers.			
	Support sharing of market intelligence and best practice through Tourist Association/trade networks & industry networking events	Quarterly meetings of Tourism Forum Minimum of 6 networking events per annum	Tourism Forum/ Local Tourist Associations/ Scottish Enterprise/ VisitScotland	Short

Theme 2 - Marketing & Promotion

Issues & Opportunities

In order to increase the number of visitor trips to the area and increase visitor spend we must focus on promoting the area to both the Leisure and Business Tourism customer. We need to reduce our dependency on the day visit market and promote the area as an **end destination**.

Within the leisure market the greatest growth potential for the area is within the short breaks market, providing opportunities to develop tourism out-with the traditional holiday periods.

As an area we must look to grow the number of visitors from south of the border where we have a low market share currently and from key European markets as well as retaining a strong positioning within Scotland. We must also capitalise on the higher profile the area has now had, particularly in the US, as a result of the G8.

Our resources must be targeted where they will yield the maximum return. This means targeting the visitors we know have an affinity with the area because we offer the range of experiences they are looking for in a break or a holiday. We must achieve a balance between finding new customers and then retaining their loyalty. It is more expensive to acquire a new customer who has never been to the area before but we know from previous research that once they have been they will return. We must continue through good customer relationship management techniques to provide previous visitors with reasons to return more frequently and to spend more when they are in the area.

Target Customers

Key customer segments for the area:

- 45+ Planners - take frequent short breaks during the year, enjoy high disposable income, like a mix of activities within a short break such as low level walking, culture & heritage, wildlife, shopping, eating out, visiting attractions, visiting gardens – **high priority market**.
- Wild Timers - aged 25- 45, like activity breaks, will come as a couple or in a group, tend to be AB professionals – **high priority market**.
- Cyclists, Walkers, Golfers and Anglers – **high priority markets**.
- Younger higher earning visitors - less satisfied with what Perthshire has to offer, more of an aspirational, lower priority market.
- Families - important for the main season, but harder to convert to a visit during the shoulder months where growth is required – medium priority market.
- Business Tourists – **high priority market**.

Product Portfolio

To target the key markets outlined above our communication activity should focus around our product portfolio strengths:

- Activity Tourism (golf, adventure, fishing, shooting, cycling)

- Freedom (gardens, wildlife, forests, walking, HUB touring)
- Culture/Heritage (events, festivals, performing arts, visual arts, genealogy, literature, ancestral tourism)
- Business Tourism, both the conference and incentive markets

Key marketing messages and a brand toolkit are currently being developed to ensure that we all communicate consistently and effectively with our target customers. Key messages will reinforce the diversity of our visitor experience; the vibrancy of our rural towns and Perth City; the quality of our shopping and range of independent shops; quality of cultural venues; a rich heritage including famous ancestral homes; thriving, arts, craft and music scenes; home to a number of recognised Scottish brands; and a reputation for good quality produce and fine dining.

To ensure our marketing campaigns targeted at the leisure visitor are effective we need businesses to develop added value seasonal breaks that will be attractive to our target markets. We need to embrace new sectors to create new visitor offerings, particularly in the area of food, retail including arts and crafts and events. And finally we need to get better at linking, working collaboratively to enhance the visitor experience. Ideally every business will create a link plan, identifying other businesses that they will work with to offer added value offers or refer visitors too, encouraging longer stays and greater spend in the area.

To establish the area as an attractive Business Tourism destination we need to ensure that we continue to offer high quality conference and meeting facilities, embracing new technology and being able to package a range of facilities and services to meet the needs of buyers.

Theme 2 – Marketing the Product

Opportunity	Specific Activities	Target	Delivered by	Timescale Short term Medium term (med) Long term
<p>Articulate an exciting and ambitious 'Perthshire The Brand'</p> <p>Supports Aims 1 & 4</p>	<p>Create a 'Perthshire The Brand' tool kit for use by all agencies and businesses . Images, key messages and copy; suggested visitor itineraries to be included which businesses could use on their own websites and marketing materials.</p>	<p>All agencies using the brand.</p> <p>30 tourism businesses using the brand by 2009</p>	<p>PKC/ Branding sub-group of Economic Partnership</p>	<p>Med</p>
	<p>Identify similar Brands that we'd like to aspire to and investigate how we can learn from their example on establishing brand identity & aligning their product to brand values.</p>	<p>Benchmarking study to be undertaken.</p>	<p>PKC/ Branding sub-group of Economic Partnership</p>	<p>Med</p>
	<p>Develop a public relations plan to target opportunities to profile Perthshire, including regular features on different areas in Perthshire in national press/targeted magazines.</p>	<p>Minimum of 3 press trips per annum Minimum of 8 consumer press releases per annum</p>	<p>VisitScotland/ PKC/ Branding sub group of Economic Partnership</p>	<p>Short</p>
	<p>Implement a range of regional marketing activities and ensure strong representation in national & international campaigns targeting high yield markets.</p>	<p>Return on investment of £1:15 as a minimum. Each campaign to be supported by Circ 30 businesses</p>	<p>VisitScotland</p>	<p>Short</p>

Opportunity	Specific Activities	Target	Delivered by	Timescale Short term Medium term (med) Long term
	Activity to: <ul style="list-style-type: none"> • maximise key brand destination messages • address seasonality • include themed/niche promotions • promote business offers/short breaks • address retention and acquisition objectives 			
	Increase the collaboration of businesses in areas such as: <ul style="list-style-type: none"> • packaging of facilities & services e.g. golf and accommodation; events and accommodation; garden breaks etc. • promotion of local facilities • identifying opportunities for applications to the marketing challenge fund and maximising VisitScotland support for successful activities. 	Minimum of 6 challenge fund applications per annum	VisitScotland / Private Sector / Tourism Forum and Associations	Short
	Work with high profile local brands to reinforce the areas credentials within key markets e.g. food and drink	12 local companies using the brand by 2009	Perth & Kinross Council / Branding sub-group of Economic Partnership	Short
	Maintain high quality visitor information (publications, interpretation signage etc.) that promote the area to visitors pre and	Over 90% satisfaction with quality of information	VisitScotland Forestry Commission Perth & Kinross	Short

Opportunity	Specific Activities	Target	Delivered by	Timescale Short term Medium term (med) Long term
	post arrival		Countryside Trust	
	Promote Perthshire at key events & Gateways e.g. Royal Highland Show, London TIC	Minimum of 3 high profile events per annum	VisitScotland / PKC	Short
	Use existing web based sites e.g. www.kids-scotland.co.uk to get Family Friendly Perthshire message across. Improve family friendly content of perthshire.co.uk and What to See & Do Guide.	Increase in number of younger visitors coming to Perthshire, measured via visitor studies	VisitScotland	Med
	Develop a cultural/city break guide to Perth promoting independent shopping, eating out, short breaks.	Minimum of 20 businesses taking part with offers.	VisitScotland/ Horsecross/ Perth City Centre Management	Short
<p>Enhance the quality of our Information & Sales services.</p> <p>Supports Aim 1</p>	<p>Identify and learn from any 'Fantastic' TICs in Scotland.</p> <p>Look for opportunities to showcase Perthshire in our TICs through visual displays and promotion of local produce.</p> <p>Implement actions resulting from the Information & Sales Review.</p> <p>Prioritise improvements to NIPs & TIPs and consider greater use of technology.</p> <p>Refurbish Blairgowrie TIC.</p>	<p>Perthshire to be involved in a minimum of 3 pilot projects e.g.</p> <ul style="list-style-type: none"> • Outreach • Queue Management • Daily E bulletins <p>Blairgowrie to be refurbished for 2007 season.</p>	VisitScotland/ Perth & Kinross Council	Med

Opportunity	Specific Activities	Target	Delivered by	Timescale Short term Medium term (med) Long term
Learn from expertly developed marketing strategies and techniques to increase the effectiveness of marketing. Supports Aims 1, 2 & 4	Provide expertise/courses/best practice examples Increase take-up of “Fully Book your business”- a marketing course run by SET	Minimum of 30 businesses to receive advice/support per annum	Scottish Enterprise/ VisitScotland	Short

Theme 3 - Exceeding Visitors Expectations

(i) Quality

Issues & Opportunities

- The best form of marketing is to encourage repeat and referral business by ensuring that the visitor has the kind of experience everyone is looking for – even better than expected. To achieve this and keep our customers coming back, we must offer consistent quality across all tourism sectors and throughout their journey.
- We have some of the core elements which can create a world-class visitor experience, but perhaps fail to give sufficient consideration and investment to getting the basics right. For example, good quality litter collection and easily accessible toilets which are available to the public are key elements of a successful tourism economy.
- The quality of our scenery may be our main attraction, but it is in our urban areas, towns, villages and the City of Perth, that visitors seek the supporting facilities they need. Many are also destinations in their own right. Considerably more investment in improving the quality of the public realm and increasing the vitality of our towns and villages is required. This includes the need to improve orientation and information provision to increase visitor satisfaction and dispersal, leading to longer stays, repeat visits and referrals.
- To surprise and delight our visitors, we all need to have enough Pride and Passion in what we have to offer to properly care for it and to give more than expected. This extends to everyone who can have an influence on visitors' perceptions of our area, people who live here and all those who work here.
- Visitor research highlights the importance of product differentiation through a recognised grading scheme. As an area we are slightly above average in terms of the quality of our core tourism product but we have the opportunity to target our product more effectively to our key target customers by encouraging take-up of new visitor welcome schemes and participation in the Green Tourism Business Scheme.

(i) Quality of the Experience

Opportunity	Specific Activities	Target	Delivered by	Timescale
<p>Increase participation in Quality Assurance schemes to raise the overall consistency of the quality of the local product</p> <p>Supports Aims 1 & 2</p>	<p>Promote the QA mystery shopper service to encourage businesses to develop an improvement plan.</p>	<p>Increase in average QA rating of 3.2</p>	<p>VisitScotland/ Perth College/ Scottish Enterprise/Private Sector</p>	<p>Med</p>
	<p>Increase participation in new QA products and welcome Schemes to provide businesses with greater opportunity to differentiate their product offering to key target markets.</p>	<p>Minimum Annual increase of 10%</p>	<p>VisitScotland/ Perth College/ Scottish Enterprise/ Private sector</p>	<p>Med</p>
	<p>Develop a Tourism Plan for non-tourism businesses e.g. articulate the benefits for local farmers, florists, newsagents etc</p>	<p>Minimum of 90 non traditional tourism businesses participating in local Tourist Associations</p>	<p>Tourism Associations/All</p>	<p>Short</p>
<p>Encourage the development of the</p>	<p>Develop a Pride and Passion plan for</p>	<p>9</p>	<p>Tourism</p>	<p>Med</p>

Opportunity	Specific Activities	Target	Delivered by	Timescale
Pride & Passion initiative in the area. Supports Aim 1	the area by identifying and guiding Ambassadors, including those not directly involved in the industry. Investigate the feasibility of a local award scheme.	ambassadors In 2006, 20 by 2008	Partnership/ Perth & Kinross Council/ VisitScotland	
	Use the local press to celebrate "Pride in Perthshire" and showcase our examples of best service, best food etc.	Weekly feature in local press	Perth & Kinross Council/ VisitScotland	Short
Maintain clean, well-managed, vibrant urban and rural environment Supports Aims 1& 3	Continue to make environmental improvements to towns and villages.	1 enhancement schemes on average per annum	Perth & Kinross Council/ Perth & Kinross Heritage Trust/Historic Scotland/ Heritage Lottery Fund/Perth & Kinross Countryside Trust	Short
	Promote "Keep Perthshire Tidy" and the ongoing development of Perthshire in Bloom initiatives.	1 gold award per annum	Perth & Kinross Council/ Take a Pride in Perthshire	Short
	Review public toilet provision in key towns and villages. Including the development and promotion of "Comfort Schemes" Schemes actively promoted to visitors in each community.	A policy on the provision of toilets by 2007	Perth & Kinross Council	Med
	Develop Perth as a service and cultural hub through Development	Increase in trading levels	Perth & Kinross Council/Scottish	Long

Opportunity	Specific Activities	Target	Delivered by	Timescale
	Plan/Economic Strategy and Perth City Partnership	recorded.	Enterprise/Perth City Centre Partnership	
	Improve the profile of the City through city marketing	Improvements in perceptions from 2006 baseline study to new study in 2009	Perth City Partnership/ VisitScotland/ Perth & Kinross Council	Med
	Maintain and enhance our outdoor product including path networks and longer distance routes and other recreational outdoor facilities e.g. Tay Forest Park, Loch Leven; improve interpretation	4 new developments per annum	Perth & Kinross Countryside Trust/ Forestry Commission/ Perth & Kinross Council/ Private landowners	Med/Long

(ii) People & Skills

Issues & Opportunities

- People are key to the success of tourism and there is a need to do more to develop the skills and the desire to work in the industry, while also recognising that everyone, regardless of experience, can learn something new, often from their peers.
- Some of the negative perceptions are based on the reality of low pay and poor working conditions. Greater recognition of the link between better employment practices and increased productivity is required.
- In many cases, employers are turning to the large pool of available labour from overseas, notably Eastern Europe. While migrant workers are often able and willing to provide good service, this gives rise to issues of reducing the authenticity of the visit and at times, language difficulties.
- A transient workforce and high turnover of staff mean that some businesses see little incentive in investing in training and developing staff who may shortly move on. Staff shortages, operational pressures, the perceived cost and inconsistencies in the availability of appropriate open training programmes in local areas combine to discourage businesses from enabling staff to participate in training. Owner operators are also affected by these issues.
- This is made worse by the difficulties smaller businesses face in taking a strategic view of training and development needs within wider business development plans and a lack of understanding of the business benefits of training.
- People can come into the industry at all levels with little or no qualifications or experience in tourism. At some levels, this can be addressed through workplace training and development. At more senior levels, particularly at owner/operator level, it is more difficult to address this which can have serious impacts on business performance and the quality of the visitor experience.
- Staff coming into the industry often lack the key skills required, particularly the softer skills, as the training provided does not always reflect industry needs. There is a particular need to develop a service ethos among new recruits and existing employees.
- Product knowledge is vital to offering a “whole” and authentic visitor experience, contributing to encouraging longer stays and repeat visits, as well as increasing visitor satisfaction. It must be a core part of training for all those coming into contact with visitors.

Opportunity	Specific Activities	Target	Delivered by	Timescale
Strengthen links between businesses and training providers, including Perth College, People 1 st and Springboard Supports Aim 2	Develop a recruitment & retention action plan to cover: 1)pre-employment tourism careers awareness raising and skills development in primary and secondary schools 2)preparing prospective employees for work in tourism, including through work placements 3)Developing employer skills in recruiting the right staff and using good employment practices to retain them	100 tourism businesses using the new tourism resource centre at Perth College	Perth College Springboard Scottish Enterprise/Padhra	Med
	Have a One Stop Shop for training information, staff resources, employee data bank	As above	Perth College	Short
	Training Providers to meet/present to tourism businesses to find out about business needs	Quarterly meetings of the Employers Forum	Perth College/Employers Forum	Short
	Develop a series of local network events linked to the Perthshire product portfolio; best practice in marketing; e-enabling your business etc.	6 network events per annum	SET/VisitScotland/Perth College	Short
Businesses to make more use of own and other operators knowledge and expertise.	Regular 'learning journeys' across Perthshire & Scotland to farmers, millers, hotels, VA's to see what they do and how we can work together.	2 familiarisation trips per annum	Perth College/Scottish Enterprise Tayside/Private Sector	Short

Opportunity	Specific Activities	Target	Delivered by	Timescale
Supports Aim 2				
	Develop a programme of staff incentivisation trips and secondments between businesses in order to gain further knowledge and understanding	Minimum of 10 businesses taking part	Perth College, Employers Forum/ Businesses	Med
	Develop a Perthshire product knowledge pack & Perthshire Big Tree Country awareness pack to ensure Businesses & frontline staff can add value to the visitor experience through personal recommendations and suggestions to visitors.	Minimum of 20 staff complete the training annually	Perth College Big Tree Country Steering Group	Short/Med
Develop innovative methods to tackle staff and skill shortages. Supports Aim 2	Work with schools to promote the importance of tourism; careers in tourism & hospitality and increase awareness of the things to see & do in Perthshire developing mini Perthshire ambassadors. Utilise the Big Tree Country "woodland bus" for this activity. Encourage schools and colleges to offer rural skills training to ensure sustainability of our countryside resource	Minimum of 10 schools participating	Perth & Kinross Council / Perth College/ Forestry Commission/ Big Tree Country Steering Group/Perth & Kinross Countryside Trust	Short/Med
	Review the need to develop a central hospitality staff bank	Review complete by March 2007	Perth College	Short
	Establish where affordable housing is most needed to meet the needs of the	Review complete by 2008	Perth & Kinross Council	Medium

Opportunity	Specific Activities	Target	Delivered by	Timescale
	tourism sector.			
	Development of induction cultural programme for incoming workers.	Minimum of 20 businesses participating	Scottish Enterprise	Short
Promote the development of a service culture Supports Aims 1& 2	Investigate the potential to develop a complementary programme of training in the practical operational competencies required to run a quality tourism business “ a tourism driving license”		Scottish Enterprise	Short
	Business operators to be encouraged to continuously develop themselves, including participation in : - national Masterclasses; - Scottish Enterprise Core Skills programme, including 100k Welcome – leadership module & staff programme; -Hospitality Assured.	30% of businesses completed 100k Welcomes leadership or staff modules by 2011 50% of parking attendants complete 100k welcomes by 2008. 50% of taxi & bus drivers complete 100k welcomes by 2008.	Scottish Enterprise/Perth College/Perth & Kinross Council	Med/long

(iii) Innovation & Product Development

Opportunities

- Visitors are also looking for new things to do and we must continue to innovate, taking a market led approach to developing new facilities, packages and events and sometimes, doing the same old things but in a very different way.
- Individual businesses and collaborative groups must all look at what they offer and re-assess their visitor experience taking into account the needs of the visitor they are looking to attract.
- Every business should be encouraged to develop a “link” plan for their business, enhancing the visitor experience through proactive suggestions/personal recommendations of things to do, places to eat etc.
- The area has strong selling points and these could be capitalised on by developing innovative product not offered elsewhere e.g. around Food, Big Tree Country etc.

(iii) Innovation & Product Development

Opportunity	Specific Activities	Target	Action By	Timescale
Encourage the development of new networks &/or enhanced products linked to market trends and the local and national product portfolio. Supports Aim 1, 2 & 4	Stimulate local innovation through the use of the Tourism Innovation Tool-kit and promotion of the TIDA award. e.g Ancestral tourism; Arts & Craft; Food, Forest Tourism etc.	2 TIDA awards per annum to local groups	Scottish Enterprise/ Local Tourist Associations	Short
	Create a local product development network based around Big Tree Country. Network would share best practice; promote sustainable tourism activities; add value to the visitor experience through joint ticketing etc.	50 businesses participating	VisitScotland/ Scottish Enterprise/Perth & Kinross Countryside Trust	Med
	Support the development of quality commercial attractions to create added value, including a “must-see” visitor attraction in Perth.	5 businesses to receive 1 to 1 advice/support per annum	Scottish Enterprise/ Perth & Kinross Council	Short
	Encourage inward investment in new resorts which will attract new markets.	Minimum of 1 international operator	Scottish Enterprise/ Perth & Kinross Council	Long
	Encourage investment in new non-serviced accommodation, specifically fractional ownership/buy-to-let holiday properties and private residence	Increase in fractional timeshare units recorded – 200 by 2011	Scottish Enterprise	Long

Opportunity	Specific Activities	Target	Action By	Timescale
	clubs.			
Improve linking and packaging of products and services between operators. Supports Aims 1, 2, 4	Encourage operators to devise a 'Link Plan' for their business, working with other existing businesses e.g. Accommodation operator 'selling' a 2 hr guided walk, Restaurant offering 'inclusive' pick-up and drop-off from local hotel/B&B to visitors via local registered taxi business	20 new networks per annum	Businesses/Tourist Associations	Med
	Monthly 'What's On' (downloadable from www.Perthshire.co.uk) to be updated and visible in tourism businesses	50% of businesses displaying monthly events calander	Businesses	Med
	Continue to develop www.perthshire.co.uk & www.perthcity.co.uk for visitors and www.perthshire.com community website to include more useful information for tourism businesses e.g. where to buy local produce.	Monthly updates to websites	Perth & Kinross Council/VisitScotland	Short
	Promote a 'year round' theme by getting tourism (and non-tourism) businesses to identify what is on from October to March	Increase no of businesses opening during the winter	VisitScotland	Long
	Investigate the creation of a "Dine Around" initiative and develop	10 local restaurants	VisitScotland/Scottish Enterprise	Short

Opportunity	Specific Activities	Target	Action By	Timescale
	local food networks, e.g Perthshire Breakfasts. Achieve Cittaslow Status for Perth	participating By 2007	Tayside/Perth & Kinross Council/Perth City Centre Management	

(iv) Culture, Events and Sport

Issues & Opportunities

- Culture, sporting and other events are an important means of drawing people to an area, and can make a major contribution to developing all-year round tourism. Over 1000 events appear on our annual events calendar and there have been some notable successes in event development in the area, including T in the Park; The Enchanted Forest; all year round programming at Perth Theatre, Pitlochry Theatre and Perth Concert Hall, but there is potential for additional event development and more targeted support for key events that have the potential to bring new visitors to the area.
- Events are also a key part of the range of activities for visitors when they arrive, increasing satisfaction and often enhancing the distinctiveness of an area. Therefore we need to ensure that we can also offer to support to the smaller events that will play a key role in enhancing the visitor experience.
- Many events are created and organised by local groups, but it can be difficult for voluntary groups to develop these to a scale where they will attract or offer high enough quality for today's visitors. Access to funding also provides a challenge for the voluntary sector with support needed to help groups develop a successful funding application. Assistance with event evaluation is also required in order that events continue to develop in line with visitor need.
- We need a strategy to target high profile events to the area which will play a key role in reinforcing our brand values and attracting new visitors.

(iv) Culture, Events & Sports

Opportunity	Specific Activities	Target	Action By	Timescale
Review and strengthen the current events programme. Supports Aim 1 & 3	Deliver Events Strategy recommendations and map key events. Align financial and other support to key events that have the opportunity to attract additional visitors and extend the season.	Actions as set out in strategy document	Perth & Kinross Council/ Scottish Enterprise Tayside/Community Planning Events Sub-group	Med
	Develop an annual events calendar to market Perthshire to target audiences through a cultural, arts, musical and gastronomic feast, maximizing the benefits of the Pitlochry Festival Theatre and Perth Concert Hall.	By Jan 2007	Community Planning Events Sub-Group	Short
	Work with Event Scotland to identify and attract events of national significance and seek support for our regional events programme	Ongoing	Perth & Kinross Council/ Event Organisers	Short/med
	Investigate the development of additional local events, based around key product themes, such as culture, activities, whisky, heritage, walking etc.		Tourist Associations/ Perth & Kinross Council/Perth & Kinross Heritage Trust/Perth & Kinross	Med

			Countryside Trust	
	Develop an event toolkit, including advice on funding, evaluation methods etc.	By summer 2007	Perth & Kinross Council	Med
Implement our new Cultural Strategy ensuring fit with our target markets Supports Aims 1, 3 & 4	Develop a plan to ensure continued investment in our built heritage		Perth & Kinross Council	Med

(v) E-Business

Issues & Opportunities

- There is a growing 24/7 mentality and 27 million adults in the UK use the web, 50% of UK adults have made holiday/travel bookings online. 75% of Americans research their holiday online and 30% book online.
- Technology advances every year, but few businesses make full use of IT to support the operation of their business and maximise its potential to attract customers.
- We need to support businesses to review their use of technology to develop their business, supporting investment in Customer Relationship Management (CRM) and online booking functionality and encouraging best practice in web design and online marketing.

(vi) E-Business

Opportunity	Specific Activities	Target	Action By	Timescale
Promote awareness of the wider benefits of e-business and encourage progress to on-line trading level. Supports Aim 2	Through case studies promote best practice and increase confidence of businesses looking to provide on line trading functionality. Support the roll out of “Web in a box”	Establish baseline of number of businesses fully e-enabled and set target	Perth College/VisitScotland	Med
	Run best practice seminars in web design, web marketing, use and benefits of databases.	1 network event per annum to focus on best practice in e’business Minimum of 30 businesses per annum receiving advice	Perth College/ VisitScotland/ Scottish Enterprise	Short
	Encourage more businesses to provide allocation to VisitScotland therefore increasing their search engine ranking and level of bookings from TICs, the Contact Centre and online bookings from visitors Promote “web in a box” when available	Increase in visitScotland bookings year on year	VisitScotland	Short
	Promote opportunities for	5 key	Scottish	Med

	businesses to source market intelligence e.g. "Knowat" or to provide information to customers through use of technology e.g. podcasts	businesses using new technology solutions	Enterprise / Tourist Associations/Private Sector	
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(VI) Access & Transport

Issues & Opportunities

- Travel by car and plane is considered to have one of the greatest impacts on our environmental locally and globally. Increasing visitor's use of public transport and alternative methods to reach us and to travel within Scotland is highly desirable, but will only happen if we improve the infrastructure which supports alternative access and make travelling by public transport an enjoyable part of the overall visitor experience which offers value for money.
- It is a fact that the vast majority of visitors will continue to travel to and around the area by car. It is essential that their car journey is of the highest quality and opportunities to enhance their experience are taken, we therefore need to identify local routes that need enhanced or suffer from poor maintenance and identify opportunities from improved signposting and interpretation.
- Ease of access is a crucial factor in deciding on choice of destination. Opportunities to increase and improve direct access to the area should be taken.
- With the establishment of the new Tayside and Central Scotland Regional Transport Partnership and the development of the new Local Transport Strategy by April 2007, there is an opportunity to influence transport planning to ensure it has a positive outcome for tourism in the area.

(vii) Access & Transport

Opportunity	Specific Activities	Target	Action By	Timescale
Improve regional transport including access to the area, information provision and the quality of the visitor experience. Supports Aims 1 & 3	Contribute to the development of both the TACTRAN Regional Transport Strategy for Perth & Kinross and the local transport strategy for Perth & Kinross, ensuring that visitors requirements are taken into account.	Regional Transport Strategy developed by April 2007 and the local Transport Strategy by April 2008.	Tayside & Central Scotland Transport Partnership (TACTRAN)/ Perth & Kinross Council/ Transport Operators	Med
	Encourage the extension of Park and Ride facilities in Perth & Kinross; and the redevelopment of Perth railway station to include a bus-rail interchange		Perth & Kinross Council/ TACTRAN/Transport Operators	Short
	Work with the Council's Public Transport Unit to: improve co-ordination between bus and rail timetables; improve public transport links to visitor activities such as walking and cycling; promote & strengthen integrated timetable information and ticketing arrangements	2 transport initiatives to be developed	Perth & Kinross Council/Transport Operators	Med
	Jointly work with local transport operators to provide transport for		Businesses/Transport	Med

Opportunity	Specific Activities	Target	Action By	Timescale
	visitors as an 'added value' service (WOW factor)		Operators/Perth & Kinross Council	
	Campaign for the upgrading of the A9 to dual carriageway for the whole route.		Perth & Kinross Council/ Tourism Partnership	Long
	Promote the development of direct rail links from Edinburgh and Glasgow including from the Airports		Perth & Kinross Council/ Scottish Enterprise/Tourism Partnership	Long
	Undertake a feasibility study into a 4 th bridge across the Tay in Perth		Perth & Kinross Council/TACTRAN	Short
	Improve the car journey experience by reviewing the findings of the "Road furniture in the countryside" study and plan for improvements to enhance the quality of stopping places and improving opportunities to enjoy views from the roads.			Long
	Provide guidance to businesses on tourist signage to maximise effectiveness of brown signs.		VisitScotland/ Perth & Kinross Council/Transport Operators	Short
Make alternative transport methods more attractive to visitors Supports Aim 1	Investigate the introduction of historic buses & bike buses; including the feasibility of a tour bus linking places of interest.	1 new visitor experience developed	Scottish Enterprise/	Med

Opportunity	Specific Activities	Target	Action By	Timescale
	Develop public transport “days out” itineraries and promote in TICs; Accommodation; brochures and on the web.	Minimum of 8 itineraries developed	VisitScotland/ Perth & Kinross Council	Short
	Work with transport operators to develop days out and short break packages to the area.	Minimum of 1 partnership	VisitScotland	Med
Provide more sustainable transport opportunities. Supports Aim 1 & 3	Increase the number of ‘Green’ fuel stations		Perth & Kinross Council / Countryside Trust	Long
	Development of the core path network and long distance routes – routes to be for multi-usage where possible e.g. cycle, walk, horse etc.		Perth & Kinross Countryside Trust/Perth & Kinross Council	Long

Theme 4 - Being Sustainable

Issues & Opportunities

If the economic growth of tourism is detrimental to the well-being of communities or damages the environment on which it relies, growth will be at best short-lived. There is the capacity for growth, but this must be done in a sustainable manner which takes account of the seven aims of Sustainable Tourism which are:

- A more even spread of visitors throughout the year
- More tourism businesses actively enhancing and protecting the environment, for example by joining the Green Tourism Business Scheme
- Greater investment in tourism people and skills
- A better integrated quality tourism product that meet visitors' demands and expectations and encourages them to stay longer and spend more
- A clearer understanding of tourism's impacts
- Greater involvement of communities in tourism planning, development and marketing
- Greater use by visitors of Scotland's public transport system

In addition to current Big Tree Country infrastructure projects, which include £2 million of Heritage Lottery Funding and the development of the core path network, the area action plan has identified the potential to develop new sustainable visitor experiences with an environmental theme which will add further credibility to this strong positioning.

- There is a lack of understanding of the full concept of sustainable tourism and how this relates to other government targets
- There is growing consumer awareness of environmental issues and an increasing number of people are including environmental factors in consumer decisions.
- Travel is one of the main contributors to environmentally-damaging carbon emissions but is an intrinsic part of tourism. A real effort must be made to mitigate its negative impacts by taking all possible steps to make business operations more environmentally friendly.
- There is a lack of awareness of the overall business benefits of introducing greener working practices, over an above creating a competitive advantage in the market place.
- Lack of information and barriers to going green can discourage businesses from aiming for the highest "green" standards available.

Theme 4: Being Sustainable

Opportunity	Specific Activities	Target	Action By	Timescale
Tap in to other initiatives promoting a more sustainable approach to tourism. Supports Aims 1 & 2	Investigate the opportunities for green initiatives, e.g. Slow Food, and seek to establish Perth & Kinross as Scotland's first Fair Trade region.	Cittaslow status achieved by Spring 2007	Perth & Kinross Council/ Scottish Enterprise Tayside	Med/long
	Encourage take-up in use of local produce in catering establishments and heighten the awareness and usage of Farmers Markets & Farm shops.	Develop and maintain a directory of local suppliers to encourage local procurement	Perth & Kinross Council	Short
	Businesses to promote/showcase local food on menu's and in promotional material	50 businesses fully participating in Eat Scotland and promoting local produce on menus	Businesses	Med
	Increase up take of recycling across the region and promote the link to protecting our key natural asset.	Raise awareness and usage of recycling services through advice, training and support to a range of tourism businesses	Perth & Kinross Council/ Tourism Partnership/Tourist Associations	Med
Maximise the benefits of the Green Tourism Business Scheme.	Grow awareness of, and participation through, the 3 levels of GTBS.	GTBS participation to increase by 50%	VisitScotland	Long

Opportunity	Specific Activities	Target	Action By	Timescale
Supports Aim 2		per annum		
	Identify and make available information on the cost/benefits of using greener practices. Encourage take-up of energy efficiency audits.		Scottish Enterprise	Med
Increase understanding of what is meant by Sustainable Tourism Supports Aim 1 & 2	Implement Big Tree Country Schools programme to promote environmental awareness in schools.	Minimum of 10 schools participating	Forestry Commission	Short
	Promote the discussion of sustainable tourism across the tourism communities in Perthshire using the "Big Tree Country" industry network group.	50 green ambassadors recruited	VisitScotland/Scottish Enterprise/Private sector	Short

3. Targets

There is a vast range of information on performance available and it would be impractical to try and reflect all of these as performance indicators to monitor the progress achieved through the implementation of this plan. We have therefore identified a selection of measures and the current position in respect of our area which can be tracked to check progress at a general level.

Indicator	Description	Source	Baseline	5 Year Target
Visitor Expenditure <ul style="list-style-type: none"> National International 	Total spend by staying visitors	STEAM	£354.25 million	£442.85 million (10 yr target = 531.37m)
Visitor Numbers	Numbers of visitors	STEAM	2.0m visitors (1.12m overnight visitors)	£2.4m visitors
Number of QA businesses by category	Number of known businesses in each sector	VS industry database	290 serviced 257 self-catering 82 Visitor Attractions 23 Caravan & Camping 10 Hostels	10% increase
Occupancy by category	Occupancy of accommodation businesses	VS Occupancy Survey	59% Hotels 44% Guest House & B&B 62% Self-catering 37% Caravan & Camping	3% increase 6% increase 6% increase 3% increase
Seasonality	Visitor Expenditure by quarter £m's	STEAM	£70.6 Jan-March £84.4 April-June £124.6 July-Sept £74.7 Oct-Dec	Oct-March increase in value - above average inflation
Total Employment	Number of jobs supported	STEAM	9,271 FTE jobs	10% increase 10,198
No of collaborative marketing initiatives		VS	7 challenge fund projects	43
Average QA rating by category	Progress made in quality assurance schemes measured by average scores by category	VS	3.2 Serviced 3.3 Self-catering 3.4 Visitor Attractions	3.4 Serviced 3.5 Self-catering 3.5 Visitor Attractions
No. of businesses undertaking training		SET	Baseline to be established	
Number of businesses: <ul style="list-style-type: none"> On web Trading on-line 		Industry Survey	Baseline to be established	
No of GTBS participants & penetration	Growth in participation in green tourism business scheme	VS	45	331`
No of Businesses in Welcome Schemes including Eat Scotland		VS	300	450

4. Tracking Progress

It is the responsibility of the Perthshire Tourism Partnership to oversee the delivery of the strategy and action plan. The Partnership will provide a full report on an annual basis to the Economic Partnership which sits within the overall Community Planning Partnership, outlining progress against the objectives of the strategy and the actions detailed in the action plan. The Partnership will also provide the Scottish Executive with a copy of the final strategy and action plan and an annual progress report.

The plan is designed to take us forward in developing a successful and sustainable tourism industry in Perthshire, however as things change in the area, in Scotland, and beyond, we are committed to refreshing it. We also need to learn from our experience of working together and continuously improve how we achieve the national vision.

The Tourism Partnership will encourage partner organisations to identify resources that they will commit to implementing this plan. However the investment of time and resources from the private sector will be crucial to the target of growing tourism revenues by 50% by 2015. The main local agencies, VisitScotland, Perth & Kinross Council, Scottish Enterprise Tayside and Perth College will play a key role in guiding businesses on the priorities outlined in the strategy and the role they play in developing tourism in the area. Businesses will be supported in a number of ways, through one to one advice, network events, seminars and through relevant, targeted communications.

We are confident that this approach will help us achieve our vision:

“To make Scotland one of the world’s foremost visitor destinations by 2015”