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IO2 – Wellbeing Tourism Destination Audit, Scotland

November 2020

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Co-funded by the
Erasmus+ Programme
of the European Union

Contents

Introduction	1
The Regional Context	1
The Wellbeing Market	2
Wellbeing Trends for Scottish Businesses	2
Wellbeing Tourism's Latent Potential for Scotland	5
Attitudes to Health and Wellbeing of Potential Scottish Visitors	5
Perceptions of Wellbeing Tourism	6
The Wellbeing Tourism Policy Infrastructure	6
The Wellbeing Tourism Business Landscape	9
Findings from the IO2 Stakeholder Survey	11
Conclusions	14
List of Resources	14

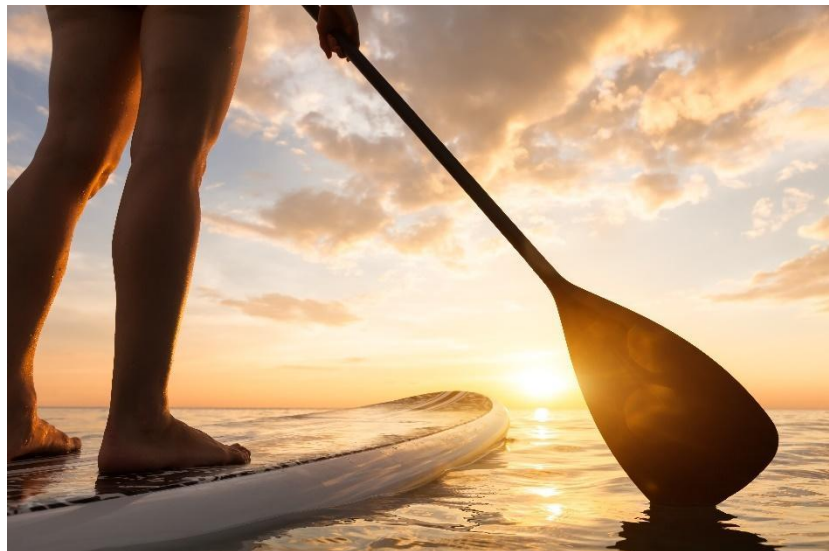
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Introduction

The fast paced digital age we live in is driving consumers to interact with technology on an almost constant basis. From searching for hotel or restaurant recommendations, to communicating through social media, consumers are constantly presented with endless streams of data. This can lead consumers to become oversaturated with information. Various studies have raised concerns about the impact this new fast paced technology is having on our mental health. From dwindling short term memory, to creating anxiety, consumers are now more informed about the impact technology can have on our mental health (VisitScotland, 2018). This has led to a rise in interest in a variety of wellness tourism activities that can help us to detox and destress.

The aim of this destination audit is to provide, first a snapshot of the wellbeing, or wellness, tourism industry, including:

- Visitor statistics.
- Marketing insights and trends.
- The policy context at a national or regional level.
- Other wellbeing tourism business support infrastructure.



The document then summarises and analyses data gleaned by the IO2 business survey, regarding:

- Stakeholder views on the current market.
- The regional context.
- Opportunities and barriers.
- Discussion of training needs.

The Regional Context

Scotland Outlook 2030: Responsible Tourism for a Sustainable Future presents a shared vision for the future of Scotland's tourism industry. Moving beyond the preceding tourism Strategy 2020 in terms of scope, tourism is acknowledged as having a significant role in delivering Scotland's wider economic strategy, but the ambition goes beyond that: to enrich the lives of those who live here and visit us, protecting and preserving our places, landscapes and heritage. It recognises the importance of encouraging visitors across the whole of Scotland, not just to its well-known sites, while on the supply-side, collaborations and partnerships are seen as vital to success. The strategy prioritises:

- Developing a skilled and passionate workforce.
- Creating sustainable destinations.
- Providing the best, authentic and memorable experiences.
- Building business resilience, sustainability and profitability.

While wellbeing tourism is not referenced specifically, it is clear from the ensuing discussion of visitor statistics and tourism trends and sights from the national tourism marketing agency, VisitScotland, that the sector has an important role to place in realising the vision.

The Wellbeing Market

It is estimated that wellness visitors spend, on average, 178% more than the average domestic tourist (Global Wellness Institute, 2017), with business opportunities for catering for both these high-spending tourists for whom wellness activities are the principal motivation for their stay, and the other travellers for whom some form of wellbeing or wellness activity is part of their visit.



Scotland's leading markets for wellbeing tourism include the USA, Germany, China and India; these represent the biggest inbound international markets and the two biggest emerging markets for tourism to Scotland respectively. From 2013 to 2018 the number of countries marketing wellbeing

tourism products grew by over 50% (source: Global Wellness Institute), so clearly there is perceived to be great demand for such experiences and Scotland needs to be able to capitalise on these growing opportunities

Wellbeing Trends for Scottish Businesses

Wellbeing was identified by VisitScotland (2019) as a significant trend in the tourism industry. It recognised that the rise of the 'millennial' consumer was a significant driver for this trend, albeit one of many factors. It identified three 'mega-drivers' powering the trend:

The Art of Now – self-development or an appreciation of a destination's culture and heritage.

Sensory Tourism – immersing the tourist in their environment, recognising the restorative, emotional benefits of being in nature, and the equally important benefits for one's physical wellbeing.

New Society Norms – more people wanting to do something meaningful with or in their lives.



The Art of Now

This recognises that one of the biggest shifts in contemporary leisure spending is the move by consumers from material assets to generating experiences and memories. The term 'travagogy' has been coined to capture an increasing desire to learn about a place while travelling, especially when such learning is via interaction with local businesses, especially those deemed as 'authentic'. The drivers for changes, along with suggestions to meet and exceed customer expectations and some inspiring real-life examples are shown below.

THE ART OF NOW

BASIC NEED

Which deep consumer needs and desires does this trend address?

Uniqueness

Convenience

Provenance

Value for money

DRIVERS OF CHANGE

Why is this trend emerging now? What's changing?

Flexible family units

Supporting local economies

Searching for simplicity

Connectivity

Valuing experiences over possessions

EMERGING CONSUMER EXPECTATION

What new consumers needs, wants, and expectations are being created by the Drivers of Change? Where and how does this trend satisfy them?

- Family friendly authentic experiences.
- Joined up travel options and itineraries with convenience.
- Home grown produce and product.
- Access to educational experiences and creative pursuits.

INSPIRATION

How are other businesses applying this trend?

- Digital design agency, Huge, is developing a coffee shop concept based on a new 'anticipatory design' philosophy.⁵
- Amazon's new convenience-store concept, Amazon Go, uses sensors and other technology to automatically detect when a customer picks up or returns products to shelves, while keeping track of 'taken' items in a virtual shopping cart.⁵
- Ida Auken, a Member of the Danish Parliament, wrote a piece for the World Economic Forum recently called *Welcome to 2030. I own nothing, have no privacy, and life has never been better*. She speculates that for many shopping can be "choosing things to use. Sometimes it can be fun, and sometimes I just want the algorithm to do it for me. The algorithm will increasingly know a user's taste better than they will."⁵
- Travellers are increasingly choosing transport providers with the best apps for managing and being informed about bookings, cancellations and making changes to plans. The providers with the most reliable tools to minimise inconvenience and delays, and maximise flexibility, will gain market share over less reliable mobile solutions.⁶

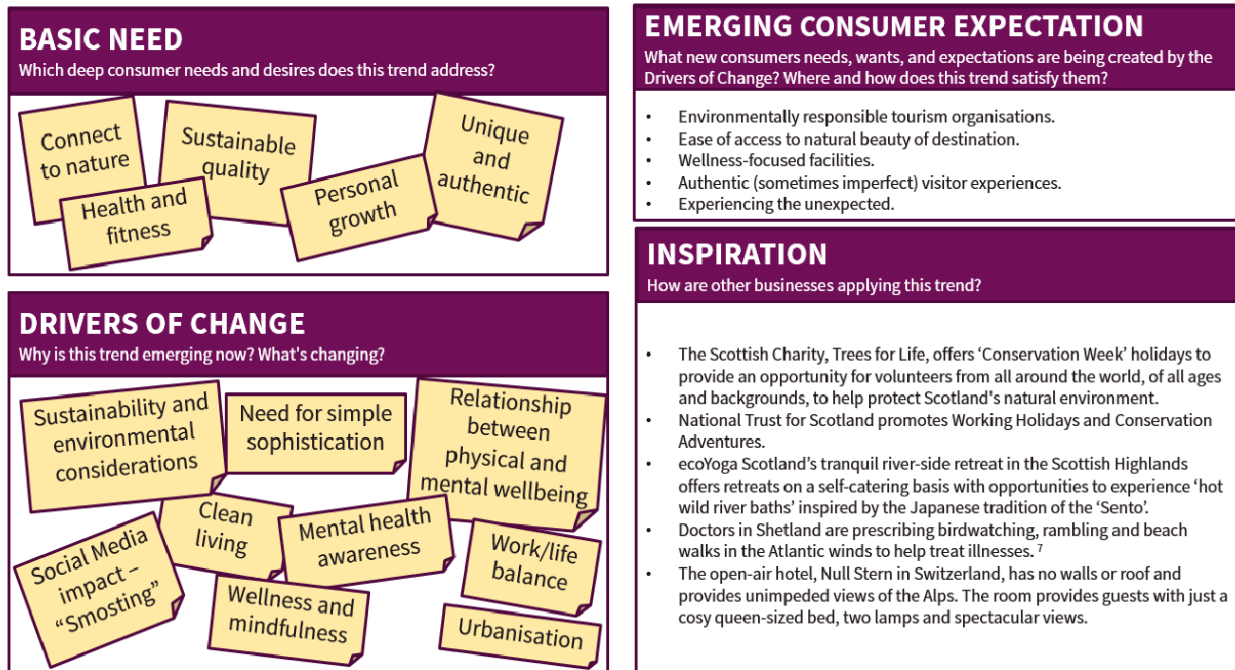
Source: VisitScotland, 2019

Sensory Tourism

Immersing the tourist in their environment recognises the restorative, emotional benefits of being in nature, and the equally important benefits for one's physical wellbeing. Recreation can therefore act as a restorative, both physically and spiritually, with an increasing desire to

celebrate the uniqueness of places without airbrushing out the imperfections. Beauty can be found in the unexpected.

SENSORY TOURISM

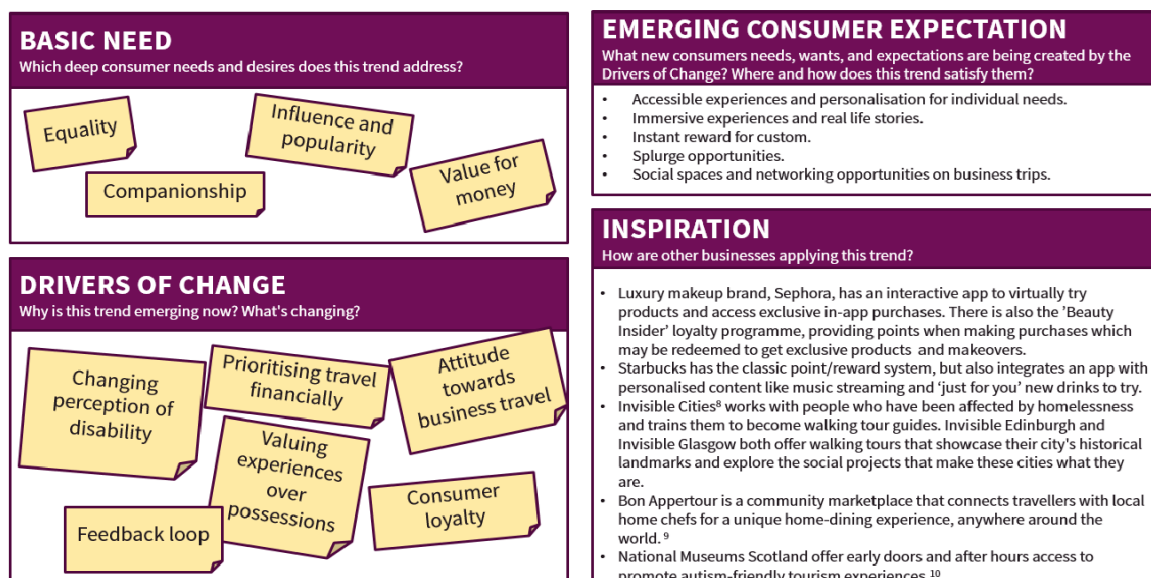


Source: VisitScotland, 2019

New Society Norms

As millennials are considered to place less emphasis on conspicuous consumption of materials goods and more on the attainment of particular experiences, this helps to create a driver for more meaningful travel, especially when these experiences are perceived as unique and with significant potential for ‘social capital’, especially via social media.

NEW SOCIETY NORMS



Wellbeing Tourism's Latent Potential for Scotland

Wellbeing tourism in the Highlands is still a relatively niche product, but the potential is recognised, as the average international wellbeing tourist spends over 50% more than the average overseas traveller. Although according to the Global Wellness Institute for 89% of travellers a wellbeing experience is only integrated as part of a trip, rather than being the focus, it is clear that a great deal of potential exists for the development of both longer wellbeing 'retreats' and shorter, discrete wellbeing products; this breadth of experiences in the Highlands is discussed elsewhere in this document.

Research, commissioned by VisitScotland and conducted by YouGov in 2018, reveals almost a third of people in Great Britain (32%) see Scotland as an ideal destination for a wellness holiday. With 11.8 million visits made to Scotland by people from across the UK, it's hoped the growing trend could generate millions of additional trips north of the Border, particularly from Londoners - a quarter (26%) of which had already been on at least one wellness holiday.

Attitudes to Health and Wellbeing of Potential Scottish Visitors

The new study also found that 31% of those surveyed say that they look after their body by being physically active and 32% take steps to look after their mental health, suggesting that they consider their mental health to be as important as their physical health. When asked to pick their top three reasons for going on holiday or a short break in the UK, a third (33%) of people in Great Britain that had been on holiday in the UK in the last two years said they did this to 'switch off from everyday life'. This was higher if they have children in the household (39%).

		Attitudes to health and wellbeing			
		I look after my body by being physically active	I take steps to look after my mental health	I know I need to do more to look after my health and wellbeing	I don't feel like I have time to think properly about my health and wellbeing
Yoga/meditation/mindfulness	43 %	44%	47%	48%	44%
Fresh air and the outdoors	42 %	47%	44%	44%	39%
Peace and quiet	41 %	39%	47%	44%	39%
Healthy eating (eg. particular diets)	35 %	37%	35%	39%	28%

Spas	35 %	36%	35%	37%	43%
Active outdoor activities (eg. walks)	25 %	34%	25%	25%	26%
Alone time	14 %	12%	14%	15%	22%
Food and drink (eg. eating out)	11 %	11%	11%	10%	14%
Culture (eg. historical tours)	8%	9%	10%	9%	8%
Don't know	6%	3%	4%	3%	3%
None of these	4%	3%	3%	3%	3%

Source: YouGov wellness survey, 2018 – all GB adults (2,019)

Perceptions of Wellbeing Tourism

From a business perspective, what makes the whole concept of wellness tourism so interesting is that a) there is confusion regarding the differences between wellness and wellbeing tourism and b) these terms mean such different things to different people. So while for some people a yoga retreat is seen as the ideal way to unwind and destress for others wellbeing is represented by a holiday spent climbing mountains – doing something really physical and time spent in the great outdoors. This is reflected in how wellness tourists are differentiated or classified. Primary wellness tourists seek these wellness opportunities as the principal purpose of their visit – these accounts for only around 10% of wellness tourism visits however. Secondary wellness visitors make up the vast majority of the market, seeking wellness opportunities as an additional part of a visit.

The Wellbeing Tourism Policy Infrastructure

Aside from the aforementioned national tourism marketing organisation, VisitScotland, the tourism policy infrastructure in Scotland is well established and runs from the national scale down to the regional level of individual destination management organisations.

Scottish Government

The government's tourism team supports Scotland's tourism and events industry by:

- Sponsoring the national tourism organisation VisitScotland.
- Working with public, private and third-sector partners to deliver the industry-led tourism strategy.
- Providing support for tourism businesses.
- Securing, planning and delivering a programme of major events and festivals.
- Funding the delivery of the national 'themed years' programmes – 2020 has been the Year of Coast and Waters.



Scottish Tourism Alliance

The STA is the representative body of the Scottish tourism industry, comprising over 250 trade associations, businesses, destination groups and other organisations with an interest in tourism. It seeks to influence and shape policy, help industry connect to encourage better collaboration and inspire the industry to help it grow. It is the key driver of Scotland's national tourism strategy development.

Wild Scotland

Wild Scotland was established in 2003 as the UK's first business association for wildlife and nature tourism operators. Over the past 15 years Wild Scotland has played an important role in Scotland for wildlife and adventure tourism. The established brand is recognised in Europe and the UK and reaching even further afield with a significant consumer reach. Wild Scotland is a membership organisation, currently representing around 100 large and small businesses across Scotland, from wildlife watching tours to adventure activity providers. Wild Scotland's importance is widely acknowledged in the wider adventure tourism industry and therefore, as a recognised sector body, it is the ideal organisation through which to access not just its members but SMEs across the sector. Although not specifically a wellbeing tourism organisation, it does nonetheless represent a significant number of SMEs whose product offerings might be classed as such.



Highlands and Islands Enterprise

HIE is the economic and community development agency for the north and west of Scotland. It has three priorities:

- To grow successful, productive and resilient businesses.
- To create the conditions for regional growth.
- We build strong, capable and resourceful communities.

It has a specific tourism team with a wide-ranging remit. Most significantly in the context of this report, it organised a series of wellness tourism videos, under the 'Tune into Tourism' label, giving valuable insights by industry experts to:

- Identify wellness travellers, find out where they're coming from and what they're looking for.
- Analyse current wellness products in Scotland, and how businesses can take advantage of current trends.
- Consider how to adapt your business to help you tap into this growing market.

For the full range of videos visit: <https://www.youtube.com/playlist?list=PLE22d82M84M-OiW40RP4GKWPZM5fPqZJa>.

The Highland Council

As the regional government body, the Highland Council's tourism role is focussed largely on development rather than marketing and promotion. In particular the Council's role includes: assisting in the development of tourism strategies for Highland; providing much of the infrastructure used by visitors; and supporting tourism businesses and business groups, working closely with the destination management organisations.

Destination Management Organisations

The role of a DMO is to create a more sustainable and nationally and internationally competitive local tourism industry, by increasing visitor numbers to the area, increasing the level of visitor spend, the length of stay and improving the visitor experience (Visit Inverness Loch Ness, 2020). The local DMO to the UHI team is the 'Outdoor Capital of the UK', a brand used by the local chamber of commerce to promote the Lochaber region directly to visitors. Through this brand, it showcases the best of what the region has to offer and provides a destination website that helps visitors discover the huge range of activities and attractions (Lochaber Chamber, 2020).

The Wellbeing Tourism Business Landscape

Scotland's tourism industry embraced wellbeing from the early days of travel. Wellbeing during the Victorian era was exemplified by the numerous spa hotels. There are fewer such wellbeing retreats in the Highlands today; however, these abundant natural assets mean that while the majority of visitors to Scotland may not take a holiday in Scotland where wellness is the main motivation or driver, many visitors are likely to take part in some form of wellness, or wellbeing, activity while on vacation here.



The tourism businesses that offer such activities are quite diverse in nature: a small number of spa hotels persist today and they have been joined by other hotels offering wellness spa packages, while other SMEs offer products and experiences that draw upon Scotland's abundant natural assets, offering, for example, forest bathing, outdoor yoga, or just the opportunities for nature walks. While many of these businesses offer holistic packages, including activities and accommodation, other businesses cluster with associated providers and offer collaborative 'packages'.

Wellness Providers Example: Stobo Castle

Billed as Scotland's only destination spa, Stobo Castle is nestled in the Scottish Borders, and allows guests, above all, 'the ability to find peace in a frenetic world'. It offers a range of wellness spa treatments, from full body massage, hot stone massage and reflexology, to less conventional treatments, Phytomer for example. It also sells Neom wellbeing treatments, that draw together six of the most effective therapies - meditation, shiatsu, cranio, Thai massage, trigger point and reflexology.

<https://www.stobocastle.co.uk/>

Bridging the Gap Between Wellness and Wellbeing Example: Gleneagles

The world-renowned hotel and golf course complex at Gleneagles offers more conventional spa treatments, but interestingly also offers top-end Wild Wellness three-day retreats, that make the most of the surrounding natural landscape, with its own take on a mindful and

restorative nature-based wellness programme. Guided by the principle that exposure to nature has significant physical and mental health benefits, invites guests to reconnect with the natural rhythm of the dramatic Scottish landscape, to nurture mind, body and soul. It includes immersive nature walks, the ancient Japanese ritual of waterfall bathing, stargazing, seasonal foraging and forest bathing.



<https://gleneagles.com/spa-wellness/>

Wellbeing Tourism Providers: Longer Retreats Example: Wild Rose Escapes

Based on the north shore of Loch Ness, Wild Rose offer week-long retreats, created to revitalise and relax. An holistic approach to relaxation is taken, combining beautiful landscapes, alternative therapies, physical exercise, healthy locally sourced food and creative arts, working on the principle that there is 'nothing better for the soul than learning something new and practising it in a beautiful place'. Spring is a wonderful time to visit the Highlands of Scotland, the spring flowers are on their way, the birds are nesting and everything is coming to life.

A typical morning will start with a yoga session, followed by an opportunity to walk most days, ranging from afternoon rambles to longer days. Other activities include a creative day, spent felting, storytelling and music, bread making, wild food foraging and cookery.

<https://www.wildrose-escapes.co.uk/course-page/relaxation-retreats/>

Wellbeing Tourism Providers: Short Retreats Example: Galloway Holistic Retreats

As a nicely quirky alternative, Galloway Holistic Retreats offers bespoke hen-does that are a little bit different, with a pampering weekend of yoga, meditation, holistic treatments such as massage, reiki or reflexology, all rounded off with a make-over and a mini photoshoot. Based in luxury accommodation in South West Scotland, the company works with clients to tailor a relaxing retreat to their needs, with potential activities ranging from the usual yoga and pilates or relaxing holistic treatments such as Swedish massage and facials, to something more energetic in the form of a weekend bootcamp.

<http://gallowayholisticretreats.co.uk/different.html>

Collaborating to Provide Wellbeing Example: Body Toolkit and Arisaig House

The Body Toolkit runs multi-day courses in conjunction with a number of quality accommodation providers. One of those locations is Arisaig House, on the Scottish west coast, offering beautiful landscape, house and gardens as a unique place to recharge and renewal. Having been used as a retreat for 150 years, Arisaig House is a great setting for wellbeing activities and allows the Body Toolkit Retreats to offer shoulder season, early Spring and late autumn, retreats. Their packages are billed as 'gentle retreat programmes [that] teach simple, yet



powerful techniques to nourish the body, reduce stress and ultimately help ourselves to thrive'.

<https://www.thebodytoolkit.com/location/arisaig-house-retreat-scottish-highlands-scotland-uk>

Findings from the IO2 Stakeholder Survey

The IO2 survey gathered six responses from the Scotland region, with three of those from responders who identified as wellbeing tourism businesses, and three who did not - with two of those specified that they were 'DMOs' - destination management organisations.

Defining Wellbeing Tourism

Understanding of the term 'wellbeing tourism' appears to be similar for those not identifying as wellbeing tourism businesses, and those that do. The definitions the wellbeing tourism businesses offered were:

- A holiday/activity during a vacation which provides an opportunity to enhance your wellbeing.
- Travel experiences that have a positive impact on the participants' mental or physical health.
- Tourism that aims to promote healthy living as well as a tourism experience.

Definitions offered from those not identifying as wellbeing tourism businesses (including two DMOs) were:

- Tourism that offers potential for development of 'self' and one's health while utilising outdoor/natural environments as one of the 'tools' to do so.
- A focus on de-stressing / relaxing finding some 'me time'.
- 'Me time' time to take stock, recharge, be inspired, slow down.



The Policy Context

When asked what national or regional policies or strategies Scottish respondents were aware of that support/encourage the growth of the wellbeing tourism sector, the responses suggested a lack of clarity on this. Answers included 'don't know', 'not very aware of', 'not aware of' and 'none', but adding that they were "aware of VisitScotland regarding it as a significant market segment". Another comment was they were aware of "individual 'slow tourism' initiatives."

Barriers and Opportunities

Some of the potential barriers or constraints to growth of wellbeing tourism in the area were listed as 'lack of marketing/branding' as the most common, then 'lack of funding', 'shortage of staff' and 'existing infrastructure'; a 'shortage of skills' was also mentioned. Some comments included "many businesses are 'lifestyle' and fit around other work and domestic commitments", and "a lot of 'wellness' businesses are a bit 'flakey' when it comes to business."

On the other side of this, some of the biggest opportunities for growth of wellbeing tourism in Scotland had commonalities, with all respondents answering 'marketing/branding' and 'post-COVID consumer behaviour'. 'Collaboration between businesses' and 'business support' were both mentioned by four respondents, and infrastructure development and policy support were also mentioned. Being seen as the most important skills in the wellbeing tourism sector included 'product development', closely followed by 'marketing' and 'customer service'. 'cross selling/collaboration', 'presentation skills' and 'wellbeing qualifications' were mentioned by two respondents and 'sales' by one.

Skills Requirements

When asked what the current skills needs are of the wellbeing tourism sector are, again 'marketing and promotion' was stated, as well as 'business development', 'wellbeing skills training', 'marketing and strategy training' and "in this area the idea that wellbeing is an important consideration for tourists".

There is a clear message emerging from the results of a perceived lack of marketing, branding, and strategic positioning of the value of wellbeing tourism in Scotland. However, this is also seen as one of the biggest opportunities, with correlative skills requirements, for growing the sector, making it a key area to focus on for development and training.

Wellbeing Tourism in Scotland

In terms of the stage that respondents would say wellbeing tourism was at in the Scotland region, two stated 'developing', and one said 'new', adding that there was "not much locally - very remote and it's only reached us in a small way with one or two other businesses." It appears to be in the earlier stages of developing and emerging as an area with scope for further development.

When asked, in their opinion, how well their region in Scotland is branded/marketed in terms of wellbeing tourism, there were varied responses of 'poor', 'good' and 'not-sure'. Accompanying the 'poor' response was the comment,



"we have a regional tourism group. I think the Cowal good food group works well. We did link up with 'slow tourism' at one point, great concept but they didn't go anywhere with it."

Wellbeing Visitors to Scotland

In terms of who are the respondent's visitors, there was a range of answers with the most popular being 'families', 'solo travellers', 'couples', and 'millennials', with 'luxury travellers' and 'other' also featuring. In terms of others, two comments added "older groups of friends (55-85 yr olds)" and "middle-aged and older women seeking a break/adventure", and adding that this group are "particularly interested in wellbeing issues". Geographically, they were mainly listed as 'national', 'Europe' and 'N. America' but also noted 'regional' and 'Australia', with one business stating, "we offer riding holidays so they come from all over the developed world for that, especially northern EU and the States."

The most important reasons wellbeing visitors come to the Scotland region were listed as 'adventure activity', 'walking/outdoors', 'scenery' and 'food'. 'Forest' and 'mountains' were also mentioned. When asked if wellbeing events happen in the region of Scotland, two said 'no' and one said 'yes' and gave the examples of "health retreats, sporting events and festivals".

Product Design

When asked about planning/designing a wellbeing tourism experience, and which features were considered important, 'nature' was the most popular answer, followed by 'uniqueness', 'atmosphere', 'activities', 'facilities', 'location', 'accessibility', and 'food'. 'Staff' and 'culture' were also mentioned. One of the respondents commented that "all were necessary to create the authentic-feeling experience".

Respondents were asked what sectors the wellbeing tourism sector crosses over with (in terms of product collaboration) in the region of Scotland, to which the responses primarily listed 'accommodation providers', 'food providers' and 'adventure activity' providers. Craft

providers were also mentioned and one respondent noted that they offered a 'one-stop' as part of their offering, but there were alternatives on offer in the area too.

Conclusions

It is clear that wellbeing tourism is recognised as a growing and important industry sector by the national body charged with tourism promotion. While the overall tourism policy context, at the national and regional level, is generally too broad to recognise the specific sectoral context in the main, the wealth of reports produced by VisitScotland on wellbeing tourism trends and insights highlights the opportunities for the Scottish tourism industry. At a local level the destination management organisations have a similarly broad tourism remit in terms of business support and destination marketing, but nonetheless activities that could be classed under the wellbeing banner are well represented in terms of local and regional promotion.

In terms of the business environment the wellbeing tourism sector in Scotland is relatively embryonic. While a number of establishments have been offering spa facilities for many years, SMEs that are geared more towards wellbeing treatments, from forest bathing to detox, are relatively few in number, especially in the Highlands and Islands, and more recent in development, reflecting the growing importance of wellbeing trends amongst consumers. A degree of crossover is also apparent, with hotels starting to recognise the value in offering experiential products that make the most of Scotland's abundant natural resources.

The whole notion of wellbeing, physiological and psychological, has taken on new meaning in 2020 as people readjust to and try to cope with life during COVID-19. As the tourism industry in many countries is starting to move into a post-pandemic recovery phase, the need to maintain social distancing may mean that the more hands-on approach of many traditional 'wellness' products gives way to activities where keeping your distance is intrinsic to the experience. As wellbeing tourism incorporates activities that have positive spiritual, physical and/or mental wellbeing effects, which may help people to cope with greater isolation and stress, this nascent yet growing tourism sector may have taken on greater significance and opportunity.

List of Resources

<https://globalwellnessinstitute.org/press-room/statistics-and-facts/>

<https://www.globalwellnesssummit.com/2020-global-wellness-trends/>

<https://www.gov.scot/policies/tourism-and-events/tourism-scotland-2020/>

[https://www.highland.gov.uk/info/1457/tourism and visitor attractions/148/tourism](https://www.highland.gov.uk/info/1457/tourism_and_visitor_attractions/148/tourism)

<https://www.hie.co.uk/our-region/our-growth-sectors/tourism/>

<https://www.outdoorcapital.co.uk/>

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

<https://scottishtourismalliance.co.uk/wp-content/uploads/2020/03/Scotland-Outlook-2030.pdf>

<https://www.visitinvernesslochness.com/>

<https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/insights-trends-2018.pdf>

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

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

<http://www.wild-scotland.org.uk/>