

Loch Kemp Storage - EIA Report
Appendix 20.2: Tourism Baseline

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Appendix 20.2: Tourism Baseline

20.1 Tourism Baseline

20.1.1 Sustainable tourism is one of the six economic sectors identified by the Scottish Government as growth sectors in its 2015 economic strategy. In 2019, sustainable tourism employed 19,000 people across the Highlands and in 2018 the sector generated £320 million GVA¹. Figures for 2021 and 2022 are not applicable due to the onset of the Covid-19 pandemic and the significant issues encountered by tourism businesses. The statistical releases for these periods are not available.

20.1.2 The GVA generated by sustainable tourism in the Highlands was approximately 7.7 % of the value added by the sector in Scotland (£4.1 billion) and employment was 8.3 % of total employment in the sector (229,000). This alongside the analysis of the industrial structure in the region suggests that the tourism sector is relatively more important in Highland than on average in Scotland.

Table 20.1b: Employment and GVA in Sustainable Tourism

| Metric | Highland | Scotland |
|-------------------|----------|----------|
| Employment (Jobs) | 19,000 | 229,000 |
| GVA (£m) | £320 | £4,141 |

Source: Scottish Government

20.1.3 Tourism activity within the Great Glen is seasonal, and much of it occurs within the months between April and September. For example, the occupancy levels for hotels in Highland and Islands are above 90 % for the months between June and August, and below 55 % between November and January².

20.1.4 The seasons are more pronounced in rural areas and this is reflected in closure of hotels during the winter period.

20.1.5 The Great Britain Day Visits Survey (GBDVS)³ provides national and regional data on domestic daily trips across the UK.

20.1.6 Due to the smaller data samples at local level, the figures at local authority level are averages over the period 2017-2019. In 2019 there were 11.6 million domestic day trips in Highland, which was equivalent to approximately 8.2 % of day trips taking place in Scotland. Day visitors spent £571 million in Highland, which was equivalent to approximately 9.9 % of spend in Scotland resulting from day visits.

¹ Scottish Government (2020), Growth Sector Database

² VisitScotland (2019), Tourism in the Highlands

³ VisitScotland (2019), Great Britain Day Visits Survey

Table 20.2b: Day Visitor Trips to the Highlands and Scotland

| Metric | Highland | Scotland |
|-------------------|------------|-------------|
| Trips | 11,600,000 | 140,800,000 |
| Spend (£ million) | 571 | 5,749 |

Source: VisitScotland

20.1.7 The most popular activities for day visitors⁴ were:

- Going for a meal in a restaurant, café, hotel, pub (2.5 million day trips);
- Sightseeing on foot (1.5 million day trips); and
- Long walking, hiking or rambling (1.4 million day trips).

20.1.8 The Great Britain Tourism Survey (GBTS)⁵ provides a series of data on tourism across the UK, including overnight domestic trips. As with the GBDVS, data for 2019 are the average over the period 2017-2019. In 2019, there were over 1.9 million domestic overnight trips in Highland, accounting for 15.7 % of domestic overnight visits taking place in Scotland.

20.1.9 Overnight visitors to Highland spent £492 million, approximately 16.5 % of the total spend in Scotland.

Table 20.3b: Overnight Domestic Tourism

| Metric | Highland | Scotland |
|-------------------|-----------|------------|
| Trips | 1,950,000 | 12,426,000 |
| Spend (£ million) | 492 | 2,989 |

Source: GBTS / GBDVS

20.1.10 Table 20.4b features overnight tourism data for international visitors (non-UK tourists) in 2019. In 2019, there were 459,000 trips from international visitors, 14.7 % of total international visits to Scotland that year. International visitors spent £202 million in Highland, out of the total £2.5 billion spent in Scotland.

Table 20.4b: Overnight International Tourism

| Metric | Highland | Scotland |
|-------------------|-------------|---------------|
| Trips | 459,000 | 3,460,000 |
| Spend (£ million) | 202,000,000 | 2,538,000,000 |

Source: VisitScotland

20.1.11 The most visited attractions in Highland by visitor numbers are displayed in Table 20.5b below, as well as their respective distances from the Proposed Development. Each of the attractions is more

⁴ VisitScotland (2019), Tourism in the Highlands

⁵ VisitScotland (2019), Great Britain Tourism Survey

than 25 miles away, with three being over 50 miles away. Urquhart Castle and Loch Ness by Jacobite, which are located approximately 25 miles away by road, are both on Loch Ness.

Table 20.5b: Top 5 Most Visited Attractions in Highland

| Attraction | Number of Visitors | Approximate Drivetime Distance from Proposed Development (miles) |
|------------------------|--------------------|--|
| Urquhart Castle | 547,518 | 26 |
| Glenfinnan Monument | 462,235 | 53 |
| Glencoe Visitor Centre | 436,924 | 57 |
| Glenmore Forest Park | 427,791 | 54 |
| Loch Ness by Jacobite | 321,980 | 25 |

Source: VisitScotland

20.1.12 Loch Ness itself is a significant tourist attraction in the area and at its closest point, is a mile from the Proposed Development.

20.1.13 The other most visited attractions in the region, identified by the VisitScotland⁶, within 20 miles of the Proposed Development include:

- Falls of Foyers
- The Caledonian Canal (and visitor centre);
- The Loch Ness Centre;
- Glen Affric;
- Nessieland;
- Cruise Loch Ness; and
- The Clansman Centre.

20.1.14 Facilities in the area closest to the Proposed Development are found in Fort Augustus and directly across Loch Ness in Invermoriston and include a selection of local shops and cafés, adventure activities such as kayaking and canoeing, Loch Ness Highland Resort and several B&Bs and self-catering accommodation providers.

20.1.15 The 60-mile Caledonian Canal passes through the Great Glen and offers boat trips on the route as well as walking and cycle routes alongside it. Its main attractions are the connection to Scottish lochs and boating activities including canoeing and fishing. Ness District Salmon Fisheries Board is the local fisheries board.

⁶ <https://www.visitscotland.com/destinations-maps/highlands/>

- 20.1.16 The main tourism facilities within the area are located within the population centres around Loch Ness. These include:
- Fort Augustus - the village of Fort Augustus is located approximately 10 miles to the southwest of the Proposed Development and serves as a base for visitors exploring the Great Glen. VisitScotland lists 70 accommodation providers in Fort Augustus including four hotels, two campsites / hostel facilities and several B&Bs and self-catering facilities;
 - Invermoriston – on the opposite side of Loch Ness, the village of Invermoriston is located 15 miles, by road, to the north of the Proposed Development. At its nearest point, across Loch Ness, it is 1.5 miles from the Proposed Development. VisitScotland lists 13 accommodation providers in the village, primarily self-catering facilities and a B&B;
 - Foyers - approximately 5 miles to the northeast on the same side of Loch Ness as the Proposed Development is the village of Foyers, which VisitScotland lists as hosting six accommodation providers, including the Foyers Lodge Hotel and the Camping and Caravanning Club Site at Loch Ness Shores; and
 - Whitebridge – lies adjacent to Dell Estate. Dell Estate has three holiday cottages for rent, as well as Dell House, which can sleep up to 18 people. In Whitebridge itself there is the Whitebridge Hotel which has 12 en-suite rooms. Also located in Whitebridge is the 16 lodge development marketed as Wildside Highland Lodges. The Wildside Centre is also located in Whitebridge, although this is a community resource, it has a programme of which certain activities which can be used by visitors to the area.
- 20.1.17 In addition to the accommodation providers within these settlements, there are some accommodation providers in rural locations within the study area.
- 20.1.18 As described earlier in this section, outdoor pursuits is a popular day activity in Highland. **Volume 2, Figure 9.1: Land Use and Recreation** illustrates the location and references/names of the known recreational routes within 10 km of the Proposed Development. **Volume 1, Chapter 9: Land Use and Recreation** highlights the recreational assets within 10 km, and these are also recognised as tourism assets, as they offer assets for locals and visitors. The land use and recreation assessment categorises and summarises outdoor recreational assets as:
- Paths and trails;
 - Hill walking and hill summits;
 - Cycling;
 - Water based recreational activity on Loch Ness; and
 - Country sports.
- 20.1.19 This section does not seek to represent these assets, and due to their dual use as assets for locals and visitors, this section, and the assessment of effects section is based on the assessment set out in **Volume 1, Chapter 9: Land Use and Recreation**.
- 20.1.20 The tourism sector in the Great Glen and wider Highland area is an important employer and visitors come from all over the world to see Loch Ness and other attractions. The tourism sector near the Proposed Development is similarly seasonal with many of the hotels closed over the winter months. Outdoor pursuits are a major driver for tourism activities, as well as being used by local residents, and these are presented in more detail in **Volume 1, Chapter 9: Land Use and Recreation**.