

# 13 Socio-Economics, Recreation & Tourism

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## 13. Socio-Economics, Recreation & Tourism

### Executive Summary

This chapter includes the socio economics, recreation and tourism assessment of the Proposed Development. The assessment of socio-economic benefits was based on the Proposed Development featuring nine turbines combining for a total generating capacity of up to 49.9 MW.

The Developer is proposing a Highland Supply Chain Initiative, which would increase the positive economic impact of the Proposed Development in the Highland Council area by proactively seeking local companies to provide goods and services. It was estimated that during the construction and development phase, the Proposed Development could generate £6.5 million Gross Value Added (GVA) and support 89 job years in the Highlands and £18.3 million GVA and 267 job years in Scotland.

Once operational, the Proposed Development could support each year £0.4 million GVA and five jobs in Highland and £0.7 million GVA and 13 jobs in Scotland.

The assessment included a review of the literature on the relationships between wind farm development and tourism. The review found there is no evidence of a general relationship between the two. Considering potential effects on local visitor attractions, accommodation providers and recreational paths, the assessment found that the Proposed Development would have no significant effects on the local tourism economy.

The Proposed Development would also support public finances and the ambitions of local communities. Local communities are set to benefit from a location-specific community benefit fund worth up to £250,000 each year. Money from the fund will finance investment in projects within the local community. Communities may also benefit from the possibility of shared ownership in the Proposed Development. In addition, each year, it could result in £0.6 million paid in non-domestic rates.

Considering existing developments in the proximity of the Proposed Development and those which have already received approval, it is expected that the Proposed Development may have a positive impact on the strengthening and development of the local onshore wind supply chain.

### 13.1 Introduction

13.1.1 This chapter provides an assessment of the potential effects of the Proposed Development on socio-economics, recreation and tourism.

13.1.2 The assessment was conducted on the basis of the Proposed Development featuring nine turbines with a total generating capacity no greater than 49.9 MW.

13.1.3 The remainder of the chapter is structured as follows:

- Section 13.2 considers the legislation, policy and guidance on which the assessment was based;
- Section 13.3 sets out the responses to the scoping opinion relevant to this chapter and where they were addressed;
- Section 13.4 describes the assessment methods and significance criteria;
- Section 13.5 sets out the socio-economic, recreation and tourism baseline conditions;
- Section 13.6 assesses the potential effects from the Proposed Development;
- Section 13.7 considers any residual effects;

- Section 13.8 considers any cumulative effects on supply chains and tourism activity; and
- Section 13.9 summarises the main findings from this chapter.

## **13.2 Legislation, Policy and Guidelines**

- 13.2.1 There is no specific legislation, policy or guidance available on the methods that should be used to assess the socio-economic impacts of a proposed onshore wind farm development. The proposed method has however been based on established best practice, including that used in UK Government and industry reports on the sector.
- 13.2.2 In particular this assessment draws on two studies by BiGGAR Economics on the UK onshore wind energy sector, a report published by RenewableUK and the then Department for Energy and Climate Change (DECC) in 2012 on the direct and wider economic benefits of the onshore wind sector to the UK economy (Department of Energy and Climate Change, RenewableUK, 2012) and a subsequent update to this report published by RenewableUK in 2015 (RenewableUK, 2015).
- 13.2.3 Similarly, there is no formal guidance on the methods that should be used to assess the effects that wind farm developments may have on tourism and leisure interests. In this case, the assessment drew on previous experience working in the area as well as on professional judgement.

## **13.3 Consultations**

- 13.3.1 The Applicant has held pre-application Community Liaison Forums with local community groups regarding the Proposed Development and matters to be addressed within the EIA. In particular, these meetings have considered the options for Community Benefit contributions from the Proposed Development, opportunities for Community Ownership and to consider potential local priorities to direct funds towards.

## **13.4 Assessment Methods and Significance Criteria**

### ***Desk Research***

- 13.4.1 To conduct the assessment of socio-economic and tourism impacts, no site visit was deemed necessary. Due to restrictions on public gathering as a result of the COVID-19 pandemic meetings and events were not possible. The assessment relied on a desk research, based on official statistics publications as well as on a review of accommodation providers and attractions from VisitScotland.
- 13.4.2 The desk research also benefitted from the study team's knowledge of the local area, including from previous stakeholder events held in the local area for a previous application, and from previous experience of work in the Highlands and in Sutherland.

### ***Assessment of Socio-Economic Effects***

- 13.4.3 The assessment of economic effects was undertaken using a model that has been developed by BiGGAR Economics specifically to estimate the socio-economic effects of wind farm developments. This model was also the basis of an assessment of the UK onshore wind sector for the then Department of Energy and Climate Change (DECC) and RenewableUK in 2012 (Department of Energy and Climate Change, RenewableUK, 2012), which was subsequently updated in 2015 (RenewableUK, 2015). These assessments were based on case studies of the local, regional and national socio-economic effects of wind farms that have been developed in the UK in recent years.
- 13.4.4 This approach is considered industry best practice in the assessment of the socio-economic effects of the onshore wind sector. This model has been used by BiGGAR Economics to assess the socio-economic effects of numerous wind farms across the UK, with the results being accepted as robust at several public inquiries.

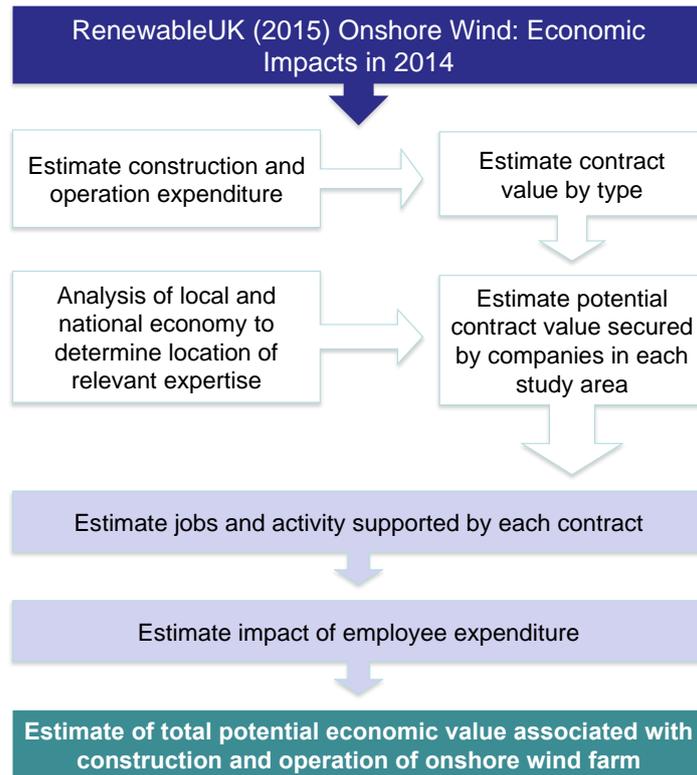
- 13.4.5 The assumptions made have been based on two main sources:
- the analysis undertaken in the 2015 report on behalf of RenewableUK, which uses evidence from previous wind farms around the UK. This report examined the size and location of contracts for their development, construction, and operation and maintenance phases; and
  - assessment of the economies of the relevant study areas undertaken, based on analysis of local, regional and national statistics.

### ***Stages in Socio-Economic Analysis***

13.4.6 To begin estimating the economic activity supported by the Proposed Development, it is first necessary to calculate the expenditure during the construction and development, and operation and maintenance phases. The total expenditure figure is then divided into its main components using calculated assumptions regarding the share that could be expected by main and sub-contractors. This provides an estimate for each main component contract that can be secured by companies in the local area, Highland and Scotland.

- 13.4.7 There are three sources of economic activity:
- component contracts and the jobs they support;
  - wider spending in the supply chain (indirect effect); and
  - spending of people employed in these contracts (induced effect).

- 13.4.8 There are four key stages of this model, which are illustrated in Figure 13-1:
- estimation of total capital expenditure;
  - estimation of the value of component contracts that make up total expenditure;
  - assessment of the capacity of businesses in the study area to perform and complete component contracts; and
  - estimation of economic impact from resultant figures.



**Figure 13-1 Approach to Direct and Indirect Economic Impact Assessment**

### ***Tourism and Recreation Assessment***

13.4.9 The potential effects of wind farm developments on the tourism and recreation sector is well-researched, and as such, key studies have been included for reference, including:

- The Economic Impacts of Wind Farms on Scottish Tourism (Glasgow Caledonian University/Moffat Centre, 2008);
- A Report on the Achievability of the Scottish Government's Renewable Energy Targets (Scottish Parliament Economy, Energy and Tourism Committee, 2012); and
- Wind Farms and Tourism Trends (BiGGAR Economics, 2017).

13.4.10 Tourist attractions and accommodation are identified within the vicinity of the Proposed Development. Tourist attractions include permanent fixtures (e.g. museums, castles and trails) as well as temporary events (e.g. music or arts festivals).

13.4.11 Important attractions within the Highlands were also identified due to their importance, even if they are not within the vicinity of the Proposed Development.

### ***Effects Evaluation Methodology***

13.4.12 The significance of the effect of the Proposed Development on each tourism and recreation asset and the economy for each study area is considered by determining the type and magnitude of change on each.

13.4.13 The impact magnitude is assessed using the economic model and professional judgement, considering socio-economic effects from the Proposed Development on the two study areas of:

- Highland (as defined by the Highland Local Authority area); and
- Scotland.

- 13.4.14 This assessment considered the direct, indirect and induced economic impacts of the Proposed Development. These are defined as:
- Direct impacts: those that arise from the initial organisation of spend;
  - Indirect impacts: those that arise from the supply chain that supports the initial organisation of spend; and
  - Induced impacts: those that arise from the spending of the salaries of the directly employed staff.
- 13.4.15 The significance of effects from the Proposed Development on tourism and recreation assets are assessed with reference to evidence from research and comparable wind farm developments.
- 13.4.16 The significance of effect on each economic, tourism and recreational asset is determined on the basis of the criteria provided below, in Table 13.1.
- 13.4.17 Major and moderate effects are considered significant in relation to The Town and Country Planning (Environmental Impact Assessment) (Scotland) Regulations 2017 (Scottish Government, 2017).

**Table 13.1 Significance Criteria**

Significance	Description
Major	Major loss/improvement to key elements/features of the baseline conditions such that post development character/composition of baseline condition will be fundamentally changed. For example, a major long-term alteration of socio-economic conditions, a major reduction/improvement of recreational assets, or a substantial change to tourism spend.
Moderate	Loss/improvement to one or more key elements/features of the baseline conditions such that post development character/composition of the baseline condition will be materially changed. For example, a moderate long-term alteration of socio-economic conditions, a moderate reduction/improvement in the recreational asset, or a moderate change to tourism spend.
Minor	Changes arising from the alteration will be detectable but not material; the underlying composition of the baseline condition will be similar to the pre-development situation. For example, a small alteration of the socio-economic conditions, a small reduction/improvement in the recreational asset, or a small change in tourism spend.
Negligible	Very little change from baseline conditions. Change is barely distinguishable, approximating to a “no change” situation.

### ***Limitations of Assessment***

- 13.4.18 The description of the baseline has been limited by the time delay of statistical releases, which means that in some cases changes in the economy, particularly the tourism economy including as a consequence of restrictions imposed by COVID-19 have not been described. There is also uncertainty about the impact of COVID-19 on the economy, in particular the tourism economy over the longer term.
- 13.4.19 The assessment is based on the experience of comparable developments elsewhere and a review of the local socio-economic context. In order to maximise the economic effects associated with the Proposed Development it will be necessary for local contractors to engage with opportunities that arise.

## 13.5 Baseline Conditions

13.5.1 The baseline socio-economic and tourism conditions were considered for the following study areas:

- The local area (north, west and central Sutherland wards);
- Highland; and
- Scotland.

13.5.2 The sources of data on which the baseline assessment was based all have lag times in publication which means that they do not take account of the economic impact of the COVID-19 pandemic. It is acknowledged that the socio-economic baseline position will have declined as a result of COVID-19, including business closures, reduction in levels of employment and increased unemployment. This is likely to be particularly the case for the tourism economy, given the restrictions that were in place for a substantial part of 2020.

### ***Strategic Economic Context***

#### **Scotland's Economic Action Plan**

13.5.3 The Scottish Government's Economic Action Plan (Scottish Government, 2018) sets out how Scotland plans to become a leader in technological and social innovations. The key aims are to increase productivity and competitiveness and to do so by supporting businesses and encouraging investment and innovation. The plan also details how Scotland will transition into a carbon neutral economy.

13.5.4 At the heart of the strategy is inclusive growth, combining increased prosperity with greater equity. The Scottish Government identified eight key themes in order to achieve this growth:

- investment: boosting private and public investment and delivering world-class infrastructure;
- enterprise: ensuring a competitive business environment;
- international: growing exports and attracting international investment;
- innovation: supporting world-leading innovation;
- skills: providing a highly skilled workforce;
- place: supporting thriving places;
- people: ensuring a sustainable working population where everyone can participate in and benefit from increased prosperity; and
- sustainability: seizing the economic opportunities in the low carbon transition.

13.5.5 Scotland has a target of becoming a carbon neutral economy by 2050. By 2030, 50 % of Scotland's energy sources are aimed to be supplied by renewable sources and productivity of energy sources is to rise 30 %.

#### **Scottish Energy Strategy**

13.5.6 In December 2017, the Scottish Government published the Scottish Energy Strategy (Scottish Government, 2017), which sets out the Government's vision for Scotland's energy future. Onshore wind is highlighted as continuing to provide a pivotal role in Scotland's economic growth.

13.5.7 The Scottish Government indicate that the use of renewable energy continues to increase in Scotland and exhibits large areas of opportunities. The Scottish Government will work to continue to support businesses in this sector to meet climate change targets and become a decarbonised society.

- 13.5.8 The strategy also highlights the importance of community benefits in renewable developments and the increase in desire for shared ownership of renewable energy projects between developers and the local communities they are delivered in.

#### **Climate Change (Emissions Reduction Targets) (Scotland) Bill**

- 13.5.9 In 2019, the Scottish Parliament unanimously passed the Climate Change (Emissions Reduction Targets) (Scotland) Bill (Scottish Parliament, 2019). The bill sets a legally binding target of achieving "net-zero" carbon emissions by 2045. Amendments to the bill also raised the interim targets to 70 % carbon emissions reductions by 2030 and 90 % by 2040.

#### **Inverness and Highland City Region Deal**

- 13.5.10 While not taking any specific initiative aimed towards the energy sector, the Inverness and Highland City Region Deal (HM Government, The Highland Council, Scottish Government, 2019) highlighted the growth and development of the sector, including renewable energy, and the impact it has had on the economic growth of the region. The deal also refers to reducing carbon emissions in the local area through a range of measures.

#### **Highlands and Islands Enterprise, 2019-2022 Strategy**

- 13.5.11 The three-year strategy outlines the aim for each area of the Highlands and Islands (Highlands and Islands Enterprise, 2019). The overarching themes of the strategy are people and place and a strong emphasis is given to inclusive growth for all regions in the area.
- 13.5.12 The renewable energy sector and low carbon economy have been identified as areas of significant economic, social and industrial opportunities both now and in the future. The strategy also highlights the commitment to aiding local communities to participate in local energy systems.

#### **Economic Recovery Plan**

- 13.5.13 At the time of writing, it is difficult to predict the longer-term consequences of the COVID-19 pandemic. To date the impact has been highest on sectors associated with tourism, such as accommodation and food services, which is particularly important in the Highlands.
- 13.5.14 The renewable energy sector in Sutherland is well placed to make an important contribution to local, regional and national economic recovery and transformation. This is because it is employment intensive in the short term during the construction phase and so can provide jobs to replace those lost in the COVID-19 crisis, and also because it delivers sustainable growth in the longer term, by decarbonising the energy supply for the economy as a whole.
- 13.5.15 The role that renewable energy can play in the economic recovery was recognised in the June 2020 report of the Advisory Group on Economic Recovery (AGER) to the Scottish Government (Advisory Group on Economic Recovery, 2020). The recommendations included "prioritisation and delivery of green investments", including that the green economic recovery is central to recovery overall and that Scotland should lever its natural advantages, such as "the almost limitless quantities of renewable energy from wind, wave and tidal power".
- 13.5.16 The report also endorsed the principles for a resilient recovery set out by the Committee on Climate Change (Committee on Climate Change, 2020), which included "use climate investments to support the economic recovery and jobs" and "ensure the recovery does not 'lock-in' greenhouse gas emissions or increased climate risk".
- 13.5.17 The Scottish Government's response, the Economic Recovery Implementation Plan (Scottish Government, 2020), sets out how it intends to take forward the AGER report's recommendations. It prioritises a sustainable recovery that supports jobs and supports all parts of Scotland, while meeting its climate change targets and wider environmental objectives.

13.5.18 This was further developed in the Scottish Government’s Programme for Government (Scottish Government, 2020), which focuses on economic recovery, making clear that the aim is not a return to business as usual, but a transition to a “fairer, greener and wealthier country”. The programme is centred around three commitments:

- the creation of new jobs, good jobs and green jobs;
- promoting lifelong health and wellbeing; and
- promoting equality and supporting young people to reach their potential.

13.5.19 Investment in renewable energy is part of the Scottish Government’s first commitment. In particular, the plan sets out a range of measures to “protect biodiversity, create green jobs and accelerate a just transition to net-zero”. Specific commitments include significant investments in a Green New Deal, including £100 million committed for a Green Job Fund and £60 million to help industrial and manufacturing sectors decarbonise, grow and diversify.

**Baseline Economic Context**

13.5.20 In 2019, the population of Scotland was 5,463,300 (National Records of Scotland, 2020). The population of Highland was 235,830 and in the local area (north, west and central wards of Sutherland) it was 5,612 (National Records of Scotland, 2020), as shown in Table 13.2.

13.5.21 The local area had a significantly higher proportion of the population aged 65 and over, accounting for 28.9 % of the population, compared to 22.5 % in Highland and 19.1 % across Scotland. While the share of the population aged 0-15 was similar in Highland and Scotland (16.6 % and 16.9 % respectively), in the local area it accounted for a smaller share (12.4 %). The share of the working age population in both the local area (58.7 %) and Highland (60.9 %) was lower than the Scottish average (64.0 %).

**Table 13.2 Population and Demography, 2019<sup>1</sup>**

	Local Area	Highland	Scotland
<b>Total</b>	<b>5,612*</b>	<b>235,830</b>	<b>5,463,300</b>
0-15	12.4 %**	16.6 %	16.9 %
16-64	58.7 %**	60.9 %	64.0 %
65 and over	28.9 % **	22.5 %	19.1 %

13.5.22 Population projections are not available at the geographic level of the local area. However, it is reasonable to assume that the trend within north-west and central Sutherland will follow that of Sutherland as a whole. Between 2016 and 2041 (most recent data available at local level), the population of Sutherland is expected to fall by 11.9 % from 13,659 to 12,032 (National Records of Scotland, 2018). This is considerably more marked than the 1.0 % decline in Highland’s population from 235,540 to 233,250 expected over the period 2018-2043 (National Records of Scotland, 2020 (b)). This contrasts with the expected population growth of 2.5 % for Scotland as a whole over the same period.

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<sup>1</sup> Source: National Records of Scotland (2020), Mid-2019 Population Estimates Scotland. \* National Records of Scotland (2020), Mid-2019 Small Area Population Estimates (2011 Data Zone based) \*\*National Records of Scotland (2019), Mid-2018 Population Estimates.

- 13.5.23 As shown in Table 13.3, the general trend of the Scottish population structure is that it will become significantly older by 2043. At this point it is estimated that 24.9 % of the population will be over 65. This is expected to be more pronounced in Highland where the proportion of the population aged 65 and over is projected to rise to 29.8 % by 2043.
- 13.5.24 The number of people of working age in Highland is expected to decrease by 8.5 % between 2018 and 2043, from 144,209 to 130,548. Population projections for Sutherland do not contain estimates by age. However, the population is expected to decline in Sutherland, it is reasonable to assume that the working age population in the local area will decline by more than 10.5 %.
- 13.5.25 An expected decline in the population, in particular in the proportion of the working age population, suggests outward migration of younger people from Sutherland. Outward migration can occur when people leave in search of economic opportunities not available in the local area. Creating more economic opportunities in the area can help to reduce this.

**Table 13.3 Population Projections, 2018-2043<sup>2</sup>**

	Sutherland*		Highland		Scotland	
	2016	2041	2018	2043	2018	2043
Total	13,659	12,032	235,540	233,250	5,438,100	5,574,819
0-15	N/A	N/A	16.7 %	14.3 %	16.9 %	14.8 %
16-64	N/A	N/A	61.2 %	56.0 %	64.2 %	60.3 %
65 and over	N/A	N/A	22.1 %	29.8 %	18.9 %	24.9 %

- 13.5.26 In 2019, Highland had an economic activity rate of 81.2 %, higher than the rate of 77.5 % for Scotland, as shown in Table 13.4 (Office for National Statistics, 2020). Conversely, Highland had a lower unemployment rate (3.1 %) compared to Scotland (3.5 %). In 2019 the median annual gross pay of those residing in Highland (£29,757) was similar to the Scottish average (£30,000) (Office for National Statistics, 2020).

**Table 13.4 Economic Indicators, 2019<sup>3</sup>**

	Highland	Scotland
Economic Activity Rate (16-64)	81.2 %	77.5 %
Unemployment Rate (16-64)	3.1 %	3.5 %
Gross Annual Median Pay (Resident)*	£29,757	£30,000

- 13.5.27 As shown in Table 13.5, in 2019 accommodation and food services accounted for the largest share of employment in the local area (22.2 %), larger than the share across Highland (13.3 %), which in turn was relatively larger than that for Scotland as a whole (8.2 %) (Office for National Statistics, 2019).

<sup>2</sup> Source: National Records of Scotland (2020), Sub-national projections 2018-2043. \*Data refer to 2016-2041, as they are unavailable at ward level for the latest projections (2018-2043). [https://www.highland.gov.uk/info/695/council\\_information\\_performance\\_and\\_statistics/165/highland\\_profile\\_-\\_key\\_facts\\_and\\_figures/2](https://www.highland.gov.uk/info/695/council_information_performance_and_statistics/165/highland_profile_-_key_facts_and_figures/2)

<sup>3</sup> Source: Office for National Statistics (2020), Annual Population Survey 2019. \*Office for National Statistics (2019), Annual Survey of Hours and Earnings – resident analysis 2018.

13.5.28 Human health and social work activities (20.0 %) was also a relatively larger sector in the local area than across Highland (16.4 %) and Scotland as a whole (15.4 %). Conversely, the construction sector was relatively less important as a source of employment in the local area (4.4 %), when compared to Highland (6.2 %) and Scotland (5.5 %).

**Table 13.5 Industrial Structure, 2019<sup>4</sup>**

	Local Area	Highland	Scotland
Agriculture, forestry and fishing	13.3 %	10.2 %	3.3 %
Mining and quarrying	0.2 %	0.4 %	1.1 %
Manufacturing	3.3 %	4.7 %	6.5 %
Electricity, gas, steam and air conditioning supply	0.0 %	0.7 %	0.7 %
Water supply; sewerage, etc	0.4 %	1.6 %	0.7 %
Construction	4.4 %	6.2 %	5.5 %
Wholesale and retail trade	5.6 %	13.3 %	13.3 %
Transportation and storage	4.4 %	4.7 %	4.1 %
Accommodation and food services	22.2 %	13.3 %	8.2 %
Information and communication	0.9 %	2.0 %	3.3 %
Financial and insurance activities	0.0 %	0.8 %	3.2 %
Real estate activities	3.3 %	1.4 %	1.5 %
Professional, scientific and technical activities	2.0 %	4.7 %	7.1 %
Administrative and support service activities	2.2 %	4.7 %	7.8 %
Public administration and defence	4.4 %	4.7 %	6.0 %
Education	8.9 %	7.0 %	7.9 %
Human health and social work activities	20.0 %	16.4 %	15.4 %
Arts, entertainment and recreation	3.3 %	3.1 %	2.7 %
Other service activities	1.8 %	1.2 %	1.7 %
<b>Total Employment</b>	<b>2,250</b>	<b>129,000</b>	<b>2,602,000</b>

#### Summary Socio-Economic Baseline

13.5.29 The population of the local area is expected to decline by 2041, in particular, the working age population, as younger people migrate in search of economic opportunities elsewhere. Creating economic opportunities in the local area could help to address this. The labour market performance of Highland is either similar or better than that of Scotland as a whole. The local area has a relatively

<sup>4</sup> Source: Office for National Statistics (2019), Business Register and Employment Survey 2019.

larger share of its working population employed in accommodation and food and service activities than both Highland and Scotland.

### ***Strategic Tourism Context***

#### **Scotland Outlook 2030**

- 13.5.30 Following on from the Tourism Scotland 2020 strategy (Scottish Tourism Alliance, 2012), a collaborative network of industry experts created Scotland's Outlook 2030 (The Scottish Tourism Alliance, 2020), which focuses on creating a world-leading tourism sector in Scotland that is sustainable in the long-term.
- 13.5.31 The strategy focuses on four key priorities: people, places, businesses and experiences. The strategy recognises the effects of climate change, technological advancements, Brexit and changing consumer behaviour on tourism and highlights the need for collaboration between government, communities and the public and private sectors.
- 13.5.32 There are six conditions that the strategy has highlighted as being crucial for success:
- using technological advancements and information to understand changes and trends in tourist behaviours;
  - ensuring policies are in place that support the vision;
  - enabling investment opportunities into Scotland's tourism market;
  - improving transport and digital infrastructure;
  - greater collaboration between businesses in the industry; and
  - positioning Scotland as a great place to live and visit locally and globally.

#### **Highland Tourism Action Plan 2020**

- 13.5.33 The Highland Tourism Action Plan 2020 (Highland Area Tourism Partnership, 2014) sets out to deliver the objectives of Tourism Scotland 2020, in Highland. The strategy points to six assets that are specific to Highland and have real potential growth opportunities:
- activities and adventure;
  - business tourism;
  - cruise;
  - golf;
  - mountain biking; and
  - sailing.
- 13.5.34 If national strategy growth targets are also met in Highland, the value of tourism in the region could increase from £738 million in 2012 to between £900 million and £1.07 billion by 2020.
- 13.5.35 Turning key assets in the area into experiences is highlighted as a key method of achieving this growth. Such experiences can be created by committing to high quality and customer service experience.
- 13.5.36 The strategy identifies the following areas of activity:
- marketing;
  - advocacy; and
  - improving the tourism product.

## **Tourism Baseline Context**

### **Sustainable Tourism Sector**

- 13.5.37 All data for this baseline has been gathered for years prior to 2020 to ensure that the significant impacts that the COVID-19 pandemic had on the sector are not considered as part of the baseline.
- 13.5.38 In 2018, the sustainable tourism sector employed 16,000 people across Highland and generated £320.4 million GVA (Scottish Government, 2020).
- 13.5.39 Of the £4.1 billion GVA generated by sustainable tourism in Scotland in 2018, around 7.7 % of this came from Highland. Sector employment in Highland accounted for 7.3 % of total sector employment (218,000) in 2018. The analysis of the industrial structure in the region (Table 13.6) suggests that the tourism sector is relatively more important in the local area and in Highland than on average in Scotland.

**Table 13.6 Employment and GVA in Sustainable Tourism<sup>5</sup>**

	<b>Highland</b>	<b>Scotland</b>
Employment (people)	16,000	218,000
GVA (£)	320,400,000	4,141,200,000

- 13.5.40 Accommodation and food services are often associated with the tourism sector. As shown in Table 13.5, this sector is more important for employment in Highland than it is for Scotland, and even more so for the local area. Accommodation and food services represent an important area of employment in the local area, accounting for 22.2 % of total employment. However, the local area accounts for only 2.9 % of accommodation and food services sector employment in Highland.

### **Visitors**

- 13.5.41 The Great Britain Day Visitor Survey (GBDVS) provides national and regional data on domestic daily trips across the UK. Due to the smaller data samples at local level, the figures at local authority level are averages over the period 2016-2018. In 2018, there were 11.9 million domestic day trips in Highland, which was equivalent to around 8.6 % of day trips taking place in Scotland (Table 13.7). Day visitors spent £413.2 million in Highland in 2018, which was equivalent to around 7.5 % of the spend in Scotland (£5.5 billion) resulting from day visits.

**Table 13.7 Day Visitor Trips to Scotland and Highland, 2018<sup>6</sup>**

	<b>Highland*</b>	<b>Scotland</b>
Trips	11,990,000	138,000,000
Spend (£)	413,200,000	5,474,000,000

- 13.5.42 The Great Britain Tourism Survey provides a series of data on tourism across the UK, including overnight domestic trips. Data used for 2019 is the average over the period 2017-2019. In 2019, over 1.9 million domestic overnight trips occurred in Highland, accounting for 15.7 % of domestic overnight visits taking place in Scotland. As shown in Table 13.8, overnight visitors to Highland in 2019 spent £492 million, around 16.5 % of the total spend in Scotland.

<sup>5</sup> Source: Scottish Government (2020), Local Authority Area Growth Sector Database.

<sup>6</sup> Source: Kantar TNS (2019), The Great Britain Day Visitor 2018 Annual Report. \*This represents the three-year average for 2018.

**Table 13.8 Domestic Overnight Tourism, 2019<sup>7</sup>**

	Highland*	Scotland
Trips	1,950,000	12,426,000
Spend (£)	492,000,000	2,989,000,000

- 13.5.43 Table 13.9 shows the number and expenditure of international visitors staying overnight in Highland and Scotland. In 2018, 521,000 international visitors stayed in Scotland, accounting for 14.7 % of all overnight international visitors to Scotland. International visitors spent £195 million in Highland, out of the £2,206 million spent in Scotland.

**Table 13.9 Overnight International Tourism, 2018<sup>8</sup>**

	Highland	Scotland*
Trips	521,000	3,538,000
Spend (£)	195,000,000	2,206,000,000

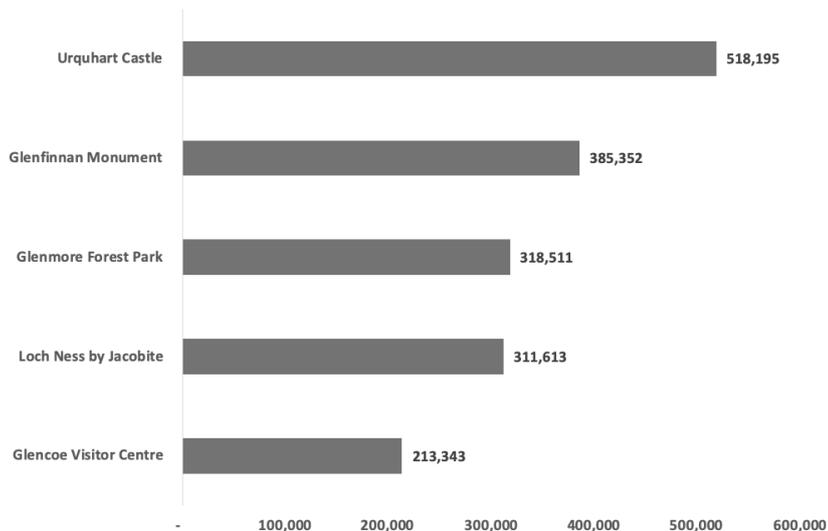
- 13.5.44 Between the period 2016-2018, the main countries of origin of international visitors to Highland were USA (24 %), Germany (19 %), France (9 %), Netherlands (6 %) and Australia (6 %) (Visit Scotland, 2017).
- 13.5.45 The most popular day trip activities for visitors to the Highlands during the same period (Visit Scotland, 2019) were going for a meal in a restaurant, café, hotel or pub (2,596 respondents), sightseeing on foot (1,461 respondents) and a long walk, hike or ramble (1,381 respondents).

#### Visitor Attractions

- 13.5.46 Figure 13-2 shows the five most visited attractions in Highland in 2018. None of these regional attractions are located within 15 km of the site. The closest attraction to the site is Loch Ness by Jacobite (Dochgarroch Lock), around 90 km from the Proposed Development.

<sup>7</sup> Source: Kantar TNS (2020), The GB Tourist, 2019 Annual Report. \*This represents the three-year average for 2019.

<sup>8</sup> Source: Visit Scotland (2019), Insight Department – Highland Factsheet. \*Visit Scotland (2019), Key Facts on Tourism in Scotland, 2018.



**Figure 13-2 Top 5 Regional Visitor Attractions<sup>9</sup>**

13.5.47 Local visitor attractions were also considered and a web search of Visit Scotland (Visit Scotland, 2020) showed that the visitor attractions within the local study area include:

- The Falls of Shin visitor attraction;
- Ferry Croft Visitor Centre; and
- Loch a' Mhuilinn National Nature Reserve.

13.5.48 None of the above attractions are located within 15 km of the Proposed Development.

#### **Recreational Activities**

13.5.49 Deer stalking (Red Deer or Sika) and fishing (salmon and brown trout) are available in the local area<sup>10</sup>. The main sporting estates include: Sallachy Estate; Duchally Estate and Lairg Estate, all of which are within 18 km from the Proposed Development.

13.5.50 Mountain biking is also available in the area with The Kyle of Sutherland Trails located just south of Lairg. There are trails for riders of all capabilities and scenic views. The location of the trails are not located within 15km of the Proposed Development.

13.5.51 Walking and hiking are also popular activities in the local area, which includes five Munros (Conival & Ben More Assynt, Meall nan Con (Ben Kilbreck), Ben Hope and Seana Bhraigh) and three Corbetts. A series of recreational trails are also located within 15 km of the Proposed Development, based on a web research of Walkhighlands.com (Table 13.10).

<sup>9</sup> Source: Visit Scotland (2019), Insight Department: Highland Factsheet, 2018

<sup>10</sup> <http://www.sallachyestate.co.uk/activities/>

**Table 13.10 Recreational Trails (Within 15 km of the Proposed Development)<sup>11</sup>**

	Distance To Site (km)	Description
Ben More Assynt	8 km	A 17 km walk on this Munro with views of all the Assynt peaks.
Beinn Leoid and Meallan a' Chuail from the A838	9 km	A 15 km walk, the trail surrounds Beinn Leoid which is hidden and removed from nearby roads.
Oykel Bridge to Inchnadamph	9 km	A 20 km walk passing through a salmon fishing river and nearby lochs.
Ben Klibreck	11 km	A Munro in East Sutherland, from the top of which there are view of Scotland's northern wilderness.
Ben Hee, from West Merkland	12 km	A 11 km walk with a rounded hill accessible from the A838 road with spectacular viewpoints.
Traligill Caves	13 km	A 7 km walk that goes up the Traligill Glen.
Eas a' Chual Aluinn	13 km	A 10 km walk leading to Britain's highest waterfall.
Glas Bheinn from Inchnadamph	13 km	Almost 16 km long, this walk leads to the top of Glas Bheinn, featuring views on the surrounding area.
Inchnadamph to Kylestrome	13 km	A trail over 27 km long, that goes first by the pass at Bealach na h-Uidhe, then reaches Britain's highest waterfall and finally arrives in Kylestrome.
Meallan Liath Coire Mhic Dhughail	14 km	A 16 km walk starting just south of Kinloch with impressive summit views.

13.5.52 Around Loch Assynt, Inchnadamph and Kylesku there are two core paths which are located within 15 km of the Proposed Development. These are included in Table 13.10 and identified as: Eas a' Chual Aluinn and Ben More Assynt. None of these paths are expected to pass through the site.

#### **Accommodation Providers**

13.5.53 A small number of accommodation providers that may be affected by the Proposed Development were identified through a web search on the Visit Scotland (Visit Scotland, 2020) portal. These were included when considering accommodation providers within a radius of 15 km from the Proposed Development, as done in similar assessments. The analysis identified five accommodation providers within the defined radius:

- Inchnadamph Lodge Hostel/B&B;
- around Corriekinloch is a cottage available within walking distance of Loch Shin and 2 km of the Proposed Development;
- close to Loch Shin is the Overscaig House Hotel;
- the Crask Inn; an Inn with rooms on the road to Altnaharra, and
- multiple self-catering accommodation units including:

<sup>11</sup> Source: <https://www.walkhighlands.co.uk/sutherland/durness.shtml>

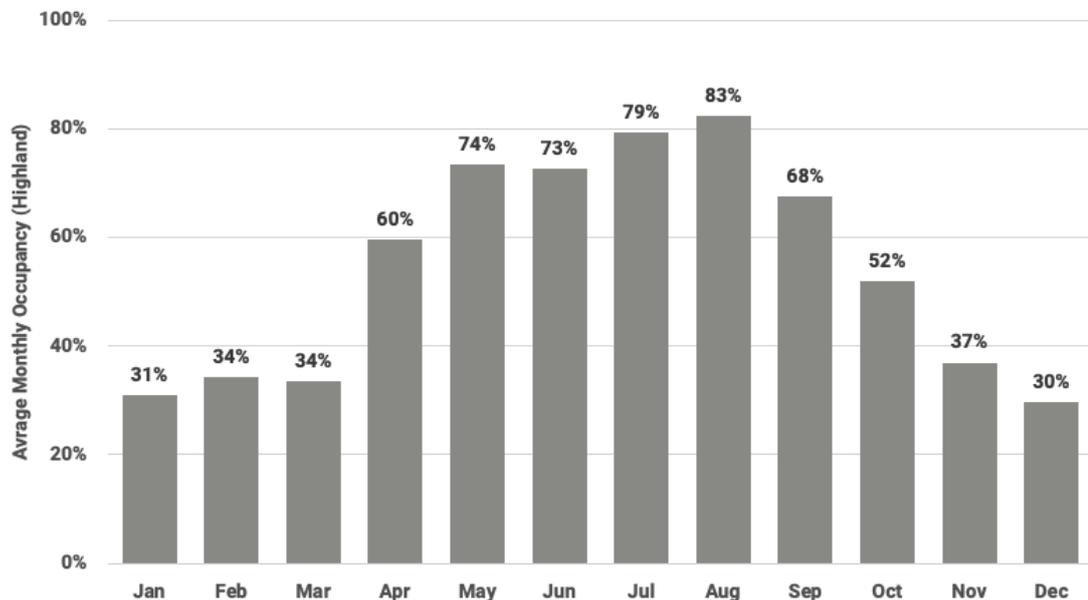
- Benmore Lodge, Assynt;
- Corriekinloch Cottage;
- Shinness Lodge;
- Grannies Cottage, Shore Cottage, Rose Cottage and Loch Shin Luxury Pods at Achnairn; and
- Sallachy Lodge and Fruachan Cottage on the Sallachy Estate.

13.5.54 Lairg is just over 15km from the Proposed Development and the nearest settlement. There are also some accommodation providers within Lairg, including:

- the Lairg Highland Hotel;
- Carnbren Bed and Breakfast Lairg; and
- multiple self-catering accommodation units.

13.5.55 The closest settlement to the site is Lairg where Dunroamin Caravan Park is located, further than 15 km from the site. The Oykel Bridge Hotel is also located within the local area over 20 km from the site.

13.5.56 The occupancy rate of accommodation providers (Moffat Centre, 2020) in Remote Rural locations, such as Loch Shin, is lower than that of Scotland as a whole. For example, the occupancy of hotels is 71 % across Scotland and 59 % in Remote Rural locations. Similarly, the occupancy of Guest Houses and B&Bs is 50 % across Scotland and 36 % in Remote Rural locations. This is particularly apparent during the winter months. Across Highland between November and March the average occupancy rate is less than 40%. At this level, it is not profitable for some accommodation providers, particularly those with employees, to remain open. As a result, some of the accommodation providers are closed during this period, including the Overscaig House Hotel.



**Figure 13-3 Average Occupancy Rate by Month (Highland, 2019)**

#### **Summary of Tourism Baseline**

13.5.57 The size of the sustainable tourism sector and the number of visits to the region suggest that tourism is a relatively important sector in Highland. In the local area the sector is relatively small in comparison to the wider Highland area but an important source of local employment. None of the main regional attractions are located close to the Proposed Development and there are no local visitor attractions

near the Proposed Development. A small number of accommodation providers are located within 15 km of the Proposed Development in the areas of Inchnadamph, Corriekinloch and Drumbeg.

## 13.6 Potential Effects

13.6.1 This section considers the potential effects of the Proposed Development on socio-economics and tourism. Effects are assessed with reference to the assets' sensitivity, as identified in the baseline.

### *Economic Effects*

#### Construction

13.6.2 The application is for nine turbines and a total generating capacity no greater than 49.9 MW. Using research undertaken by BiGGAR Economics on behalf of RenewableUK in 2015 (RenewableUK, 2015), the average expenditure on the development and construction of wind farms can be estimated based on the average spend per MW, the average spending per turbine, or a combination of the two, as appropriate. On the basis of this methodology the total development and construction cost of the Proposed Development was estimated to be £60.2 million.

13.6.3 This expenditure was then split into four categories of contracts:

- development and planning;
- balance of plant;
- turbines; and
- grid connection.

13.6.4 The proportion of spending associated with each contract was estimated based on BiGGAR Economics' research on wind farms that are currently in operation in the UK. This is shown in Table 13.11 and found that 69.8 % of capital expenditure (Capex) would be on turbine contracts, 20.5 % on balance of plant contracts, followed by grid connection (5.2 %) and development (4.5 %).

**Table 13.11 Development and Construction Expenditure by Contract Type**

	% Capex	Value of the Proposed Development (£ million)
Development and Planning	4.5 %	2.7
Turbines	69.8 %	42.0
Balance of Plant	20.5 %	12.3
Grid Connection	5.2 %	3.1
<b>Total</b>	<b>100 %</b>	<b>60.2</b>

13.6.5 The economic impact from expenditure during the construction and development phase were estimated for Highland and Scotland as a whole. Unless stated otherwise Scottish figures are inclusive of the economic impacts taking place in Highland. To estimate the economic impact occurring in each study area, it was necessary to establish the amount of spending on each contract type by study area.

13.6.6 Assumptions on the potential expenditure taking place as a result of the Proposed Development in each study area were based on recent evaluations carried out by BiGGAR Economics of wind farm developments in Highland. It is recognised that each project is different, though these estimates set out a benchmark against which the project's local content can be compared.

- 13.6.7 Assumptions also take into account the Applicant’s approach to enhancing the level of local content including the Highland Supply Chain Initiative, a commitment to benefit the local economy by offering preferential treatment to local contractors. The purpose of this initiative is to actively seek to identify Highland suppliers so that they can maximise the impact in Highland from the project expenditure. The initiative will include:
- supply chain events, when COVID-19 restrictions allow it, the Developer will engage directly with potential supply chain companies at events in the area to explain the range of opportunities that the project could bring and to gain an understanding of the capacity of companies in Highland to meet these opportunities;
  - identifying local companies that are new to the onshore wind sector; and
  - weighting procurement policies to give an advantage to companies based in Highland.
- 13.6.8 The result of the Highland Supply Chain Initiative will be an increase in the share of expenditure that is secured by Highland companies. In the previous application the applicant has held meet the buyer events to access the local contractors. Due to COVID-19 restrictions, this could not be held prior to the application being submitted, but will take place when practical and appropriate.
- 13.6.9 To estimate the expenditure for each contract in each of the study areas these percentages were applied to the estimated size of each component contract.
- 13.6.10 On this basis, it was estimated that Highland could secure contracts worth £9.8 million, equivalent to 16 % of the total capital expenditure. The largest opportunity for Highland would be with balance of plant contracts as companies in the area could secure 55 % of contracts, worth £6.8 million.
- 13.6.11 The share and value of each contract by study area is shown in Table 13.12. Scotland (including Highland) was estimated to be able to receive contracts worth £22.2 million, equivalent to 37 % of the total capital expenditure. The largest opportunities would be the contracts related to balance of plant, worth around £9.3 million and elements of the turbine contracts (the supply of towers) worth £8.1 million.

**Table 13.12 Development and Construction Expenditure by Study Area and Contract Type**

	Highland		Scotland	
	%	£m	%	£m
Development and Planning	10 %	0.3	63 %	1.7
Turbines	4 %	1.6	19 %	8.1
Balance of Plant	55 %	6.8	75 %	9.3
Grid Connection	35 %	1.1	100 %	3.1
<b>Total</b>	<b>16 %</b>	<b>9.8</b>	<b>37 %</b>	<b>22.2</b>

- 13.6.12 The contract values potentially awarded in each area would represent an increase in turnover of businesses in these areas. Using industry-specific data from the Annual Business Survey (Office for National Statistics, 2020 a)), which gives the turnover per GVA ratio for each of the industries involved, the GVA impact from any increase in turnover can be estimated.
- 13.6.13 On this basis, it was estimated that the development and construction contracts would generate £4.7 million direct GVA in Highland and £10.3 million direct GVA in Scotland. This is shown in Table 13.13.

**Table 13.13 Direct GVA during Construction and Development (£ million)**

	Highland	Scotland
Development and Planning	0.2	1.1
Turbines	0.7	3.5
Balance of Plant	3.3	4.4
Grid Connection	0.4	1.2
<b>Total*</b>	<b>4.7</b>	<b>10.3</b>

\* Totals may not add up due to rounding.

13.6.14 Similarly, the contract values potentially awarded in each area would support employment. Turnover per employee for each of the industries involved is also given by the Annual Business Survey, which allows the employment from any increase in turnover to be estimated.

13.6.15 The employment impacts during the development and construction phase are reported in job years as the contracts would be short-term. Job years measures the number of years of full-time employment generated by a project. For example, an individual working on this project for 18 months would be reported as 1.5 job years.

13.6.16 In this way, the development and construction impacts were estimated to support 67 job years in Highland, with 47 job years being related to the balance of plant contracts. In Scotland, 161 job years are estimated to be supported, of which 68 job years are related to the balance of plant. This is shown in Table 13.14.

**Table 13.14 Development and Construction - Employment in Job Years**

	Highland	Scotland
Development and Planning	3	15
Turbines	12	65
Balance of Plant	47	63
Grid Connection	6	18
<b>Total*</b>	<b>67</b>	<b>161</b>

\* Totals may not add up due to rounding.

13.6.17 There would also be knock on effects in the supply chain and from spending by employees in the local economy. These effects are estimated by applying Type I (indirect) and Type II (indirect and induced) GVA and employment multipliers, which are sourced from the Scottish Government's Input-Output Tables (Scottish Government, 2020), to the direct GVA and employment impacts.

13.6.18 In order to adjust these multipliers, which consider the national economy, for the economy of Highland it was assumed that indirect multiplier effects would be 33 % of the national impact, and induced multiplier effects, which consider the effect of local spending, would be 70 % of the national impact. The assumption on the share of the indirect multipliers at the level of Highland was based on BiGGAR Economics' experience and understanding of the local supply chain, whereas the share of

induced impacts taking place locally, was based on an analysis of data from the Office for National Statistics' 'Family Expenditure Survey in the UK – April 2017 to March 2018' (ONS, 2019).

- 13.6.19 In this way, it was estimated that the indirect economic impacts would be £0.7 million GVA and 10 job years in Highland and £4.5 million GVA and 66 job years in Scotland. This is shown in Table 13.15.

**Table 13.15 Indirect Economic Impact during Construction and Development**

	Highland	Scotland
GVA (£ m)	0.7	4.5
Employment (job-years)	10	66

- 13.6.20 It was also estimated that induced economic impacts would be £1.1 million GVA and 12 job years in Highland and £3.4 million GVA and 40 job years in Scotland. This is shown in Table 13.16.

**Table 13.16 Induced Economic Impact during Construction and Development**

	Highland	Scotland
GVA (£ m)	1.1	3.4
Employment (job-years)	12	40

- 13.6.21 Adding direct, indirect and induced impacts, it was estimated that expenditure during the construction and development of the Proposed Development could generate £6.5 million GVA and support 89 jobs in Highland and £18.3 million GVA and 267 jobs across Scotland. This is shown in Table 13.17.

**Table 13.17 Total Economic Impact during Construction and Development**

	Highland	Scotland
GVA (£ m)	6.5	18.3
Employment (job-years)	89	267

- 13.6.22 Considering the relative size of the economy in the two study areas, the socio-economic effects from the construction and development of the Proposed Development were assessed as **negligible** (beneficial) in Highland and **negligible** (beneficial) in Scotland.

### Operation

- 13.6.23 The operation and maintenance impact of the Proposed Development was estimated as the impact that would persist throughout the lifespan of the Proposed Development.

- 13.6.24 Annual expenditure on operations and maintenance was estimated based on analysis undertaken in the 2015 RenewableUK report. It was estimated that the annual operations and maintenance expenditure associated with the Proposed Development could be £1.4 million (which excludes community benefit payments and non-domestic rates).

- 13.6.25 In order to estimate the economic impact of the operation and maintenance expenditure in Highland and Scotland, it was first necessary to estimate the proportion of contracts that could be secured in each of these areas. These assumptions were based on the contract proportions reported in the RenewableUK report, the analysis of the industries present in each of the study areas, as well as previous experience BiGGAR Economics had on onshore renewable wind farms in Highland.

- 13.6.26 On this basis it was estimated that Highland could secure 40 % of operation and maintenance contracts, worth £0.5 million, and that Scotland could secure 79 % of contracts, worth £1.1 million. This is shown in Table 13.18.

**Table 13.18 Annual Operation and Maintenance Expenditure by Study Area**

	Highland		Scotland	
	%	£m	%	£m
Operation and Maintenance	40	0.5	79	1.1

- 13.6.27 As with the construction phase, the contract values awarded in each of the study areas represent an increase in turnover in those areas. The economic impact of the increase in turnover on GVA and employment was estimated in the same way as the construction expenditure, using data from the Annual Business Survey (Office for National Statistics, 2020 a)).
- 13.6.28 In this way, it was estimated that turnover generated by the operation and maintenance of the Proposed Development could support £0.3 million GVA and four jobs in Highland, and £0.5 million GVA and eight jobs in Scotland. This is shown in Table 13.19

**Table 13.19 Annual Operations and Maintenance Direct Impact**

	Highland	Scotland
GVA (£ m)	0.3	0.5
Employment (job-years)	4	8

- 13.6.29 There would also be indirect and induced impacts during the operation and maintenance of the Proposed Development, which were estimated using the same method as for the development and construction phase.
- 13.6.30 Adding together the direct, indirect and induced impacts, it was estimated that the total annual economic impact would be £0.4 million GVA and five jobs in Highland, and £0.7 million GVA and 13 jobs in Scotland. This is shown in Table 13.20.

**Table 13.20 Total Economic Impact During Operations and Maintenance**

	Highland	Scotland
GVA (£ m)	0.4	0.7
Employment (job-years)	5	13

- 13.6.31 The impact of annual expenditure on operations and maintenance contracts has been assessed as **negligible** (beneficial) for both Highland and Scotland, with reference to the relative size of the two economies.

### ***Wider Effects***

#### Community Benefit Funding

- 13.6.32 In line with Scottish Government's Good Practice Principles for Community Benefits from Onshore Renewable Developments (Scottish Government, 2019), the Proposed Development is set to provide £5,000 per MW in annual community benefits.

- 13.6.33 According to a Memorandum of Understanding signed in November 2018 by the Applicant and the six beneficiary communities in central and north-west Sutherland, the funding will be split as follows:
- 35 % to Lairg Community Council;
  - 20 % to Creich Community Council;
  - 20 % to Ardgay and District Community Council; and
  - 25 % to the north-west Communities (Scourie, Kinlochbervie and Durness).
- 13.6.34 While this remains an area of discussion, it is expected that the community benefit fund would be equivalent to up to £250,000 per year, or £7.4 million over the Proposed Development's 30-years lifetime. The money will allow the beneficiary communities to develop a set of projects in line with local needs and aspirations.
- 13.6.35 How this funding is spent will reflect the priorities of these communities. Therefore, at this stage it is not possible to estimate the impact of this spending as this will be dependent on what the money is spent on. There is a history of community benefits in the area and therefore the communities are well set up to use this money to maximise potential economic and social benefits to these areas.
- 13.6.36 For example, if this were to be used to support operational activity within community organisations, based on the turnover per job ratio of the volunteering sector, the community benefit fund could support four jobs. Alternatively, the community fund could be used to invest in tourism and recreation assets, that will enable communities to generate economic activity from the increasing visitor numbers to the North Coast 500. Communities have also used similar funding to drive economic activity by investing in digital infrastructure, such as improved broadband connectivity in rural areas.
- 13.6.37 The effect associated with the community benefit fund was assessed as **negligible** because it is not known how the funds will be spent. There is the potential for the effect to be either minor or major beneficial, depending on how the community decides to spend the income.

#### Community Ownership

- 13.6.38 The Proposed Development includes the possibility for the communities of central and north-west Sutherland to have a stake in the project by partaking in a shared ownership scheme. Community ownership has the potential to increase the funding that the community is able to invest, alongside the community benefit funding, to achieve the social and economic objectives of the communities.
- 13.6.39 The initiative provides communities with the opportunity to take up to 10 % of equity in the Proposed Development. This would then entitle them to a corresponding share of profits, once it is operational and generating profits. The returns from the equity in the Proposed Development would then benefit the local communities by funding projects in line with their aspirations and needs.
- 13.6.40 While acknowledging the possibility for other arrangements, the Scottish Government (Scottish Government, 2019) identifies three ways in which a similar shared ownership scheme could be administered, including:
- Joint Venture Model, also referred to as Special Purpose Vehicle;
  - Shared Revenue Model; and
  - Split Ownership Model.
- 13.6.41 In the case of the Proposed Development, the Applicant has opted for the creation of a Special Purpose Vehicle (SPV) owned by Lairg and District Community Initiative, the Kyle of Sutherland Development Trust and the north-west Communities.

- 13.6.42 Even if the local communities were not able to raise enough equity to invest in the Proposed Development, there remains the possibility for them to receive alternative financial benefits. These will be dependent on the Proposed Development's output and will be in addition to any funding received through community benefits.

#### Non-Domestic Rates

- 13.6.43 The Proposed Development would be liable for non-domestic rates, the payment of which would contribute directly to public sector finances. Analysis of the rateable value of other wind farms in Highland suggests that the average rateable value per MW is £22,265, and that based on a capacity no greater than 49.9 MW, the gross rateable value would be around £1.1 million.
- 13.6.44 Since the rateable value falls between £860,001 and £4.0 million, the Proposed Development would be eligible to a 10 % relief. As a result, the total rateable value applied on it could be around £992,000.
- 13.6.45 Given a poundage rate of £0.524 per £1 of rateable value, it is estimated that the Proposed Development could contribute up to £578,000 annually to public finances. However, the actual contribution would depend on variables such as the actual load factor, and the potential for any relief from non-domestic rates.
- 13.6.46 These non-domestic rates, by providing an additional revenue stream, would support the delivery of local government services.
- 13.6.47 Over the Proposed Development's 30 years' lifetime, non-domestic rates' contributions are expected to be £17.3 million.
- 13.6.48 The effect on the economy of Highland from the annual contribution from the Proposed Development to non-domestic rates was assessed as **negligible** (beneficial).

#### ***Effects on Tourism and Recreation***

##### ***Wind Farm and Tourism Evidence***

- 13.6.49 A study of the potential effects of wind farms on tourism was undertaken by the Moffat Centre at Glasgow Caledonian University in 2008 (Glasgow Caledonian University/Moffat Centre, 2008). The study found that, although there may be minor effects on tourism providers and a small number of visitors may not visit Scotland in the future, the overall effect on tourism expenditure and employment would be very limited. This study is now about 12 years old, although a Scottish Government report confirmed the findings (ClimateXchange, 2012), and in that time wind farms have become a more common feature in Scotland. As such, it would be expected that any negative effects on the tourism economy would now be apparent.
- 13.6.50 However, the Moffat Centre study was based on what could happen, rather than what has happened. In 2017 BiGGAR Economics undertook a study into the effects of already constructed wind farms on tourism at the national, regional and local level (BiGGAR Economics, 2017).
- 13.6.51 Tourism employment was considered over the period 2009 to 2015, a six-year period over which Scotland and almost all local authority areas increased the number of wind farms, while employment in sustainable tourism also grew significantly. The analysis found no correlation between tourism employment and the number of turbines at the national or local authority level.
- 13.6.52 The study also considered the impact on employment at a much smaller, more granular level, in data zones up to 15 km from developments. The sites considered were constructed between 2009 and 2015. As these sites did not exist in 2009, comparing employment in 2009 and 2015 was considered an effective measure of the effect of wind farms on local employment, while excluding construction impacts, such as wind farm related employees staying in local accommodation.

- 13.6.53 At the local authority level in these smaller areas, no link was found between the development of a wind farm and tourism related employment. In 21 out of the 28 areas considered, employment in this sector grew. In 22 of the areas, employment either grew faster or decreased less than the rate for the relevant local authority area as a whole.
- 13.6.54 Overall, the conclusion of this study was that published national statistics on employment in sustainable tourism demonstrate that there is no relationship between the development of onshore wind farms and tourism employment at the level of the Scottish economy, at the local authority level, nor in the areas immediately surrounding wind farm developments.
- 13.6.55 The findings of this research are in accordance with those of the Scottish Parliament’s Economy, Energy and Tourism Committee in 2012 (Scottish Parliament Economy, Energy and Tourism Committee, 2012), when they concluded that there is no robust, empirical evidence of a negative link between wind farm development and tourism.
- 13.6.56 Overall, there is no research evidence that shows that fears of negative effects on the tourism economy in Scotland as a result of wind farms have been realised.
- 13.6.57 Within that overall context, the following assessment nevertheless considers whether there might be any specific effects on individual tourism assets. This assessment considers whether the Proposed Development could result in changes in the behaviour of tourists that might lead to effects on the tourism economy.

### ***Basis of Assessment***

- 13.6.58 This section assesses whether there would be an effect on the tourism economy, as a result of the Proposed Development leading to a change in behaviour, for example, a change in visitor numbers or tourism income. Therefore, the assessment is made on whether the Proposed Development could lead to a change in behaviour that would lead to effects on the tourism economy.
- 13.6.59 The assessment of tourism assets was conducted based on the offering prior to the start of the COVID-19 pandemic.

### ***Tourism/Recreation Assets***

- 13.6.60 This section considered whether the Proposed Development would have any effect on tourism assets, including regional visitor attractions, local visitor attractions and local accommodation providers, as identified in Section 13.5.

### ***Regional Visitor Attractions***

- 13.6.61 In 2018 the most visited attractions in Highland were Urquhart Castle, Glenfinnan Monument, Glenmore Forest Park, Loch Ness by the Jacobite and Glencoe Visitor Centre (Visit Scotland, 2019). The closest attraction to the Proposed Development is Loch Ness by the Jacobite which is around 90 km from the closest turbine.
- 13.6.62 Urquhart Castle, 95 km to the south of the Proposed Development, with over 1,000 years of history features views of Loch Ness and the Great Glen. Visitors have the opportunity to find out more about the historical events that have occurred at the Castle through its artefacts collection as well as historic replicas and short films.
- 13.6.63 Located a few kilometres away from Urquhart Castle, around 90 km from the closest turbine, stands Loch Ness by the Jacobite. This attraction offers visitors with boat tours of Loch Ness.
- 13.6.64 Glencoe Visitor Centre is a visitor attraction under the care of the National Trust of Scotland. Located over 160 km from the closest turbine, it has scenic views as well as it provides visitors with an introduction to local history, including the tale of the 1692 Massacre of Glencoe.

- 13.6.65 Glenfinnan Monument commemorates the 1745 Jacobite Rising. The monument surrounded by the Highland landscape, features a lone Highlander with his kilt. This tourist attraction is over 140 km distant from the closest turbine.
- 13.6.66 Located within the Cairngorms National Park, Glenmore Forest Park features forests, lochs with sandy beaches and hosts a variety of animal and plant species. The Park is over 120 km distant from the closest turbine.
- 13.6.67 Given these visitors' attractions distance from the Proposed Development as well as the fact that none of the characteristics which make them popular with visitors is likely affected, the effect on them has been assessed as **negligible**.

### ***Local Visitor Attractions***

- 13.6.68 The local visitor attractions identified in the baseline include:
- the Falls of Shin visitor attraction;
  - the Ferrycroft Visitor Centre; and
  - Loch a' Mhuilinn National Nature Reserve.
- 13.6.69 The Falls of Shin visitor attraction is mostly renowned for the fact that during the summer it is possible to observe Atlantic salmon leaping from the current in an attempt to reach the river Shin. Forestry Land Scotland created a series of walking routes in the nearby forest.
- 13.6.70 The Ferrycroft Visitor Centre has a café and hosts several displays including features on "water", "land" and "people". Two walks start from the Visitor Centre: the Ord Hill Archaeological Trail and Ferrywood.
- 13.6.71 Loch a' Mhuilinn National Nature Reserve features the most northern remnant of native oak in Britain. A varied landscape includes peatbogs, grasslands and freshwater.
- 13.6.72 The closest local visitor attraction to the Proposed Development is Loch a' Mhuilinn around 25 km to the north-west. Given these visitor attractions' distance as well as their relative capacity to attract visitors, the effect of the Proposed Development has been assessed as **negligible**.

### ***Core Paths***

- 13.6.73 The baseline identified ten recreational paths as being in the proximity of the Proposed Development. Each one of them is considered in turn and the effect of the Proposed Development is assessed. Chapter 6 has assessed the visual impact of the Proposed Development, including from key mountain top viewpoints.
- 13.6.74 Ben More Assynt and Conival, the only two Munros in Assynt, are around 8 km from the closest turbine.
- 13.6.75 At around 9 km from the closest turbine, two trails have been identified: Beinn Leoid and Meallan a' Chuail from the A838 and Oykel Bridge to Inchnadamph. Beinn Leoid and Meallan a' Chuail from the A838 is a seven-hours walk that reaches the summit of Beinn Leoid and Meallan a' Chuail, where there is a good view over the surrounding area, including of Loch Shin. Oykel Bridge to Inchnadamph is a section of the Scottish National Trail. Over 31 km long, this trail starts from the River Oykel, passes from Benmore Forest to reach Inchnadamph on the shores of Loch Assynt.
- 13.6.76 Ben Klibreck is a Munro in East Sutherland located around 11 km from the closest turbine. Following a steep ascent, from the top of the Munro views of wilderness can be enjoyed.
- 13.6.77 Ben Hee, from West Merklund is a 11 km walk that reaches the top of Ben Hee, from which it is possible to enjoy the view of Ben Hope and Quinag.

- 13.6.78 Eas a' Chual Aluinn and Eas a' Chual Aluinn, Traligill Caves, Glas Bheinn from Inchnadamph and Inchnadamph to Kylestrome are all around 13 km distant from the closest turbine. Eas a' Chual Aluinn and Eas a' Chual Aluinn is a 10 km walk that after coasting several lochlands and streams reaches Chual Aluinn, the highest waterfall in Britain. The path does not reach the top of the waterfall, but one of its most scenic spots. Traligill Caves is a 7 km walk that goes up the Traligill Glen. Glas Bheinn from Inchnadamph is a walk that leads to the top of Glas Bheinn, featuring views on the surrounding area. Inchnadamph to Kylestrome is a trail over 27 km long, that goes first by the pass at Bealach na h-Uidhe, then reaches Britain's highest waterfall and finally reaches Kylestrome.
- 13.6.79 Meallan Liath Coire Mhic Dhughail, located at around 14 km from the closest turbine, is a trail that reaches the hill with the same name. As similar hills and mountains nearby, this hill features scenic views.
- 13.6.80 Recreational visitors walk along these recreational trails for a range of reasons, including spending time in nature, exercising or Munro-bagging. Given the distance of all these trails from the Proposed Development and the fact that it is unlikely to affect any of the motivations leading visitors to use them, its effect on the recreational trails considered was assessed as **negligible**.

### ***Fishing & Deer Stalking***

- 13.6.81 Alongside walking, fishing is one of the main recreational activities in Sutherland. In particular, fishing activity takes place in Loch Shin namely for trout and salmon. Since the reasons motivating recreational fishers, namely the availability of fish in the lake, is not affected by the Proposed Development, its effect on fishing activity was assessed as **negligible**.
- 13.6.82 Similarly, deer stalking is a common recreational activity in the local area. Deer stalking takes place across several estates for both Red Deer and Sika with the season typically falling between July and February. The main estates are located within 18 km of the Proposed Development and it is not likely to affect the ability to take part in this form of activity nor deter motivations for doing so. Therefore, the Proposed Development's effect on deer stalking has been assessed as **negligible**.

### ***Local Accommodation Providers***

- 13.6.83 In addition to the evidence on the lack of an empirical relationship between wind farms and the tourism economy, a recent study by BiGGAR Economics (BiGGAR Economics, 2020) considering SSE's onshore wind developments in the Great Glen found that these projects increased the demand for accommodation from business visitors. Given the tourism's sector seasonality, business trips can be particularly important in the bookend of the tourism season and can allow some accommodation providers to stay open for longer.
- 13.6.84 Overscaig House Hotel is around 2 km from the closest turbine. The Overscaig House Hotel is currently for sale (Bell Ingram, 2020) and the trading season for the hotel is described as between Mid-April to the end of October. It markets itself based on its location as a place where it is possible to relax as well as to engage in a range of activities including fishing, walking, cycling, climbing or bird-watching. Given the proximity to the Proposed Development there may be some change in some on this asset's setting, in particular the views of Loch Shin, though no change is expected in its attractiveness to visitors as a base to engage in recreational activities. The Hotel also has its own wind turbine on the site and therefore the introduction of the Proposed Development will not be a new concept. For this reason, its effect has been assessed as **minor** as the change will be detectable but not material.
- 13.6.85 In Corriekinloch, around 5 km from the closest turbine, there is a cottage accommodation available within walking distance of Loch Shin. It markets itself based on the tranquillity of the glen where it is located, as a base for further exploring the Highlands and for its views. The effect of the Proposed

Development was assessed as **negligible**, as it is shielded from it by hilly terrain and no change is expected in its ability to attract visitors as a base for exploring the Highlands.

- 13.6.86 Inchnadamph Lodge Holiday Accommodation, which is located around 12 km from the closest turbine, offers its guests with accommodation in the Lodge, the Shepherd's Hut as well as in a series of cottages. The accommodation is marketed as a base for excursions exploring the surrounding area. The area's offering in terms of these activities is unlikely to be affected by the Proposed Development. Consequently, the effect has been assessed as **negligible**.
- 13.6.87 Benmore Lodge, located around 11 km from the closest turbine, this provider markets itself based on the recreational activities available in the area including kayaking, canoeing, walking (it is one stop along the West Highland Way) and cycling. Considering that the availability of these activities in the area is unlikely to be affected by the Proposed Development, its effect has been assessed as **negligible**.
- 13.6.88 The accommodation in Lairg is over 15km from the nearest turbine. The turbines will not be visible from majority of the accommodation providers, with the exception of the self-catering accommodation on the Lairg Estate. The accommodation in and around Lairg is marketed as a place to explore the wider countryside and participate in sporting activities such as angling, shooting and golf. The paths and country sports that have been identified in this assessment have been assessed as having a negligible impact. Therefore, the effect on the accommodation providers has also been assessed as **negligible**.

### ***Tourism/Recreation Assets Summary***

- 13.6.89 The overall significance of the Proposed Development's effect on the local tourism economy has been assessed as negligible.
- 13.6.90 The potential for minor effects at the Oversaig House Hotel will not impact on the wider tourism economy. The Moffat Report (Glasgow Caledonian University/Moffat Centre, 2008) highlights that a minority of potential visitors will choose to stay at a different establishment if they do not like the views of onshore wind farms. However, the presence of the Proposed Development will not change the main attractions of those who would have chosen to travel to the hotel, such as fishing and other outdoor pursuits. The occupancy rates of accommodation providers in Remote Rural locations suggests there will be sufficient capacity for other accommodation providers to meet the needs of these potential visitors. As a result, it is expected that there may be some internal displacement within the local tourism economy, however the net result would be **negligible**.

## **13.7 Mitigation**

- 13.7.1 On the basis of the assessment conducted above, there is no need for general mitigation measures to be carried out.

## **13.8 Residual Effects**

### ***Construction***

- 13.8.1 During the construction and development phase, it was assessed that the Proposed Development would have a **negligible** (beneficial) effect on the economy of Highland. The effect on the Scottish economy was assessed as **negligible** (beneficial).

### ***Operation***

- 13.8.2 Spending taking place during the Proposed Development's operation was assessed as having a **negligible** (beneficial) effect on the economies of both Highland and Scotland.

- 13.8.3 During its operation, each year the Proposed Development will also contribute to public finances around £578,000 in non-domestic rates. The effect of this on economic activity was assessed as **negligible** (beneficial).
- 13.8.4 The communities in central and north-west Sutherland will also receive each year up to £250,000 in community benefits. The effect of the community benefits fund was assessed as **negligible** (beneficial).
- 13.8.5 The assessment of tourism and recreation assets and of accommodation providers within 15 km from the Proposed Development found that there were no significant effects as a result of the Proposed Development.

## 13.9 Cumulative Effects

13.9.1 The Highland Council has provided details on other sites that have to be considered for their cumulative effects (consultation details are provided in Appendix 2.2). These are listed below.

- Six operational wind farms, namely:
  - Achany;
  - Coigach Community turbine;
  - Kilbraur;
  - Kilbruar Extension;
  - Lairg; and
  - Rosehall.
- Two wind farms that have been consented but have not started construction, namely;
  - Braemore; and
  - Lairg 2;
- One wind farm that is under construction, namely;
  - Creag Riabhach.
- Five wind farms in the scoping and application stages, namely;
  - Meall Buidhe;
  - South Kilbraur;
  - Strath Tirry;
  - Lairg 2 resubmission; and
  - Garvary.

### ***Supply Chain***

13.9.2 Given the existing operational developments and developments that have already received approval in the proximity of the Proposed Development, the Proposed Development has the potential to generate beneficial cumulative impacts. This will be the case if it were to further encourage the development of a local renewable energy supply chain. The presence of an existing supply chain in the local area and a pipeline of projects may also lead to new businesses engaging with the sector. This may be favoured by the Applicant's commitment to a Highland Supply Chain Initiative.

13.9.3 The development of a strong local supply chain would help to increase the economic benefits of the Proposed Development and similar projects in the local area, which could help to increase the magnitude of the long-term beneficial economic effects considered in this chapter.

13.9.4 Additionally, if additional community benefit and shared ownership income was secured from other similar developments in the area this would enable the local community to leverage more funding and investment into the area.

### ***Tourism***

13.9.5 Adverse cumulative effects on tourism, recreation and socio-economics could occur if the Proposed Development was expected to have a significant cumulative impact on important tourism receptors and this resulted in a change of visitor spending behaviour. The cumulative visual impact of the Proposed Development is assessed in Chapter 6. It is, however, important to note that even if such effects were to occur, they would not necessarily result in impacts on the tourism and recreation economy.

### ***Community Benefit***

13.9.6 There is a potential positive cumulative effect from the other listed developments and the proposed community benefit fund. In particular, the Community Councils that will be the beneficiaries of the funds from the Proposed Development will receive funding from these developments to employ economic development personnel. These economic development personnel will be able to direct funding from the proposed community benefit fund in such a way that will maximise the economic and social benefits to each local community.

## **13.10 Summary**

13.10.1 The population in the local area is relatively older than that of Highland, where it is older than on average across Scotland. Though an ageing population will characterise Scotland as a whole in the future, this trend will be more marked in Highland, which will also experience a decline in its population. Highland tends to have either a similar or better labour market performance than Scotland as a whole: gross annual incomes of full-time workers in Highland are similar to those of elsewhere in Scotland and Highland is characterised by lower unemployment and higher rates of employment than the Scottish average.

13.10.2 Tourism is a relatively important sector in Highland, with the share of tourism activity in the region being larger than would be expected based on the area's population. Accommodation, food and beverage services activities constitutes the single largest sector of employment in the local area, though it corresponds to less than 3 % of the sector in Highland.

13.10.3 It was estimated that spending during the construction and development of the Proposed Development could result in:

- £6.5 million GVA and 89 job years in Highland; and
- £18.3 million GVA and 267 job years in Scotland.

13.10.4 During each year of the Proposed Development's operation, expenditure in operation and maintenance contracts could result in:

- £0.4 million GVA and five jobs in Highland; and
- £0.7 million GVA and 13 jobs in Scotland.

13.10.5 The assessment of the effect of the Proposed Development on tourism assets was conducted with reference to a review of the literature on the relationship between wind farm development and

tourism and to a desk-based research of assets close to the Proposed Development. This found no general relationship between the wind farm development and tourism activity.

- 13.10.6 The literature review was complemented by a detailed analysis of the tourism assets, recreational trails and accommodation providers within 15 km of the Proposed Development. This found that the Proposed Development could have a **minor** effect on Overscaig House Hotel and a **negligible** effect on all other assets considered and the overall tourism economy. This means that from an environmental impact assessment perspective no significant effects on recreational and tourism activity as a result of the Proposed Development were identified.
- 13.10.7 The Proposed Development is also expected to deliver each year up to £250,000 in community benefits. This money will benefit those communities in its proximity and will fund a range of projects. It was estimated that the funding has the potential to support four jobs.
- 13.10.8 Over its lifetime the Proposed Development will contribute to public finances through the payment of non-domestic rates. In this way, it is expected to contribute around £578,000 each year, or around £17.3 million over its lifetime. The effect from the payment of non-domestic rates was considered **negligible** (beneficial).
- 13.10.9 The Proposed Development also provides an opportunity for shared ownership to the communities in central and north-west Sutherland. This or an alternative scheme providing funding based on the revenue from the Proposed Development could expand the benefits accruing to local communities.
- 13.10.10 Based on the presence of existing onshore wind developments in the area, the potential for cumulative effects was considered. The analysis found that given existing and approved onshore developments in the area, there could be additional benefits towards the strengthening of the local onshore wind supply chain.
- 13.10.11 Table 13.21 below provides a summary of the residual effects.

**Table 13.21 – Summary Table – Socio Economics, Recreation and Tourism**

Description of Effect	Significance of Potential Effect		Mitigation Measure	Significance of Residual Effect	
	Significance	Beneficial/ Adverse		Significance	Beneficial/ Adverse
£6.5 million GVA and 89 job years in Highland during the construction and development phase.	Negligible	Beneficial	N/A	Negligible	Beneficial
£18.3 million GVA and 267 job years in Scotland during the construction and development phase.	Negligible	Beneficial	N/A	Negligible	Beneficial
£0.4 million GVA and five jobs in Highland during operations and maintenance phase.	Negligible	Beneficial	N/A	Negligible	Beneficial
£0.7 million GVA and 13 jobs in Scotland during operations and maintenance phase.	Negligible	Beneficial	N/A	Negligible	Beneficial
Annual payment of an estimated £250,000 in community benefits.	Negligible	Beneficial	N/A	Negligible	Beneficial
Annual payment of an estimated £578,000 in non-domestic rates.	Negligible	Beneficial	N/A	Negligible	Beneficial
Effect on tourism assets.	Negligible	N/A	N/A	Negligible	N/A
Effect on Overscaig House Hotel.	Minor	N/A	N/A	Minor	N/A
Effect on other accommodation providers.	Negligible	N/A	N/A	Negligible	N/A
Effect on core path and recreational trails.	Negligible	N/A	N/A	Negligible	N/A

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