

EARBA STORAGE

A GILKES ENERGY COMPANY

Earba Pumped Storage Hydro Scheme EIA Report

Appendix 19.2: Tourism Baseline

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Appendix 19.2: Tourism Baseline

19.1 Tourism Baseline

- 19.1.1 Sustainable tourism is one 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 is not available.
- 19.1.2 The GVA generated by sustainable tourism in the Highland 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 19.1b: Employment and GVA in Sustainable Tourism

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

Source: Scottish Government

- 19.1.3 Tourism activity 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.
- 19.1.4 The seasons are more pronounced in rural areas and this is reflected in closure of hotels during the winter period.
- 19.1.5 The Great Britain Day Visits Survey (GBDVS)³ provides national and regional data on domestic daily trips across the UK.
- 19.1.6 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 19.2b: 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

19.1.7 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).

19.1.8 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.

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

Table 19.3b: Overnight Domestic Tourism

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

Source: GBTS / GBDVS

19.1.10 Table 19.4b 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 19.4b: Overnight International Tourism

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

Source: VisitScotland

⁴ VisitScotland (2019), Tourism in the Highlands

⁵ VisitScotland (2019), Great Britain Tourism Survey

- 19.1.11 The most visited attractions in Highland by visitor numbers are displayed in Table 19.5b below, as well as their respective distances from the Proposed Development. Each of the attractions is more than 35 miles away, with three being over 50 miles away.

Table 19.5b: Top 5 Most Visited Attractions in Highland

Attraction	Number of Visitors	Approximate Drivetime Distance from Proposed Development (miles)
Urquhart Castle	547,518	61
Glenfinnan Monument	462,235	45
Glencoe Visitor Centre	436,924	50
Glenmore Forest Park	427,791	35
Loch Ness by Jacobite	321,980	71

Source: VisitScotland

- 19.1.12 The other popular attractions in the region, identified by the Visitscotland⁶, within 20 miles of the Proposed Development include:
- Laggan Wolfrax Mountain Biking
 - Spey River Farm;
 - Dalwhinnie Distillery and Whisky Shop;
 - Creag Meagaidh National Nature Reserve;
 - Wildcat Experience; and
 - Highland Folk Museum
- 19.1.13 Facilities in the area closest to the Proposed Development are found in Dalwhinnie and Newtonmore and include a selection of local shops and cafés, adventure activities such as walking and mountain biking and several B&Bs, hotels and self-catering accommodation providers.
- 19.1.14 The main tourism facilities within the area are located within the population centres around Loch Laggan. These include:
- Dalwhinnie - the village of Dalwhinnie is located approximately 10 miles to the east of the Proposed Development and serves as a base for visitors as they enter the Cairngorms National Park. It is one of the highest, and coolest (temperature) villages in the UK, making it a popular location for winter walking and hiking. There is a popular walking destination along the River Truim and in Cairngorm and Monadhliath Mountains in the Cairngorm National Park. Dalwhinnie is on the Sustrans National Cycle Route 7, Glasgow to Inverness. There are several cycle routes in the area including one alongside Loch Erich. There are a range of self-catering and B&B accommodation providers in and around Dalwhinnie.

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

- Newtonmore – is around 15 miles northeast of the Proposed Development. It is a larger settlement than Dalwhinnie. Newtonmore calls itself the "Walking Centre of Scotland", referring both to its geographical location and to the great walking opportunities locally, like the Wildcat Trail. An extension to the Speyside Way includes Newtonmore to a Long Distance Route and it has become the new end to this trail. The village is home to The Wildcat Experience - a visitor attraction specially aimed at families with children. The attraction is based on a community arts project - everyone in the village had the chance to be involved. Newtonmore is the site of the Highland Folk Museum. There are arrange of hotels, B&Bs, a campsite and self catering in the village and surrounding area.
- 19.1.15 In addition to the accommodation providers within these settlements, there are a range of self-catering accommodation providers in rural locations within the study area.
- 19.1.16 As described earlier in this section, outdoor pursuits is a popular day activity in Highland. **Chapter 15 - Recreation and Access** illustrates the location and references/names of the known recreational routes within 15km of the Proposed Development. **Chapter 15 - Recreation and Access** highlights the recreational assets within 15km, 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;
 - Boating and canoeing; and
 - Country sports.
- 19.1.17 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 **Chapter 15 - Recreation and Access**.
- 19.1.18 The tourism sector in the Loch Laggan and Highland area is an important employer and visitors come from across the UK and overseas to explore the Cairngorms National Park and many attractions and activities on offer. There are 2.4 million overnight visitors to Highland. The key attractions in the area are mainly outdoor activities and tourism activity is predominantly seasonal in character. 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 **Chapter 15 - Recreation and Access**.