

# The Highland Council

<b>Agenda Item</b>	<b>6</b>
<b>Report No</b>	<b>ECI/45/24</b>

**Committee:** Economy and Infrastructure

**Date:** 14 November 2024

**Report Title:** Sustainable Tourism Strategy 2024-2030

**Report By:** Assistant Chief Executive – Place

## 1 Purpose/Executive Summary

- 1.1 The purpose of this report is to present Members with the final version of the sustainable tourism strategy for approval. The purpose of the strategy is to set out the Highland Council's ambition for a sustainable tourism sector and what the Council's contribution will be up to 2030.

The strategy will shape how the Council will work with others and invest its resources, including future income streams such as the visitor levy and any other external funds which can be secured. The report also outlines the work which has helped to inform and shape the sustainable tourism strategy, including a formal public consultation, input from partners and extensive engagement with Council services.

## 2 Recommendations

- 2.1 Members are asked to:

- i. **Note** the summary of responses to the consultation as set out in Appendix 2 and the key changes which have been made following the consultation as outlined in section 6;
- ii. **Agree** to adopt the sustainable tourism strategy as set out in Appendix 1;
- iii. **Agree** to the next steps set out in Section 8, which includes the preparation of an associated delivery programme; and
- iv. **Agree** that the Tourism Strategy be amended to accommodate consultation feedback on the visitor levy scheme as proposed in Item 7 and that a further report on any changes be reported to a future meeting of this Committee.

## 3 Implications

- 3.1 **Resource** – The preparation and delivery of the associated delivery programme will require further cross service work to take place. The delivery programme will be influenced by availability of Council resources as well as other sources.

- 3.2 **Legal** - There are no direct legal implications arising from the preparation of the Council's sustainable tourism strategy. However, the strategy is expected to be a key consideration for other, associated programmes and funding streams such as the visitor levy.
- 3.3 **Risk** - There are no significant risks arising from the adoption of the Council's sustainable tourism strategy.
- 3.4 **Health and Safety (risks arising from changes to plant, equipment, process, or people)** – There are no significant health and safety implications arising from the adoption of the Council's sustainable tourism strategy.
- 3.5 **Gaelic** - Gaelic is an important part of the Highland culture and identity, and it will be considered from a tourism perspective. The finalised plan and other relevant material will include Gaelic as per the Council's policy.

#### 4 **Impacts**

- 4.1 In Highland, all policies, strategies or service changes are subject to an integrated screening for impact for Equalities, Poverty and Human Rights, Children's Rights and Wellbeing, Climate Change, Islands and Mainland Rural Communities, and Data Protection. Where identified as required, a full impact assessment will be undertaken.
- 4.2 Considering the various impacts is a core element to inform the decision-making process. When taking any decision, Members must give due regard to the findings of any assessment.
- 4.3 **Integrated Impact Assessment - Summary**
- 4.3.1 An Integrated Impact Assessment screening was undertaken in June 2024. The conclusions have been subject to the relevant Manager Review and Approval.
- 4.3.2 The Screening process has concluded that there are there are likely to be several positive impacts arising from the strategy. Given the high-level, strategic nature of the strategy, the expected positive impacts will be better understood when associated delivery programme has been developed. Members are asked to consider the summary in **Appendix 1** to support the decision-making process.

4.3.3

<b>Impact Assessment Area</b>	<b>Conclusion of Screening</b>
Equality	Protected characteristics – no impact for all categories, except Disability which has been identified as resulting in a positive impact
Socio-economic	Prospects/Opportunities and Places could see positive impacts
Human Rights	Positive impact
Children's Rights and Well-being	Positive impact
Island and Mainland Rural	Positive impact
Climate Change	Positive impact
Data Rights	No impact

## 5 Background

- 5.1 Tourism plays a major role in Highland, with the region attracting 8.4m visitors in 2023, generating £2b in economic impact and supporting around 21,000 direct jobs. Welcoming so many visitors and ensuring the sector continues to be a positive force for economic, social and environmental change, requires investment and a planned approach. Strong partnership working across communities and the private and public sectors is key to realising this objective.
- 5.2 The strategic focus for the tourism sector has traditionally been driven by the industry with support from the Scottish Government and the wider public sector. This has seen national and regional strategies developed over the years, including the national tourism strategy 'Scotland's Outlook 2030' which establishes headline priorities for the sector up to 2030.
- 5.3 Members have considered two previous reports in respect to the Council's own sustainable tourism strategy. On 17 August 2023, Members agreed to commence the preparation of a strategy for Highland and on 2 May 2024, Members agreed that the draft strategy would be subject to a period of public consultation, prior to a final version being considered for approval.

## 6 Summary of Consultation Feedback and main changes

- 6.1 The Council facilitated two workshops to consider the detail of the draft strategy, the first was with Council Members followed by a second with industry bodies and partner agencies. Updates were also provided to a range of industry representatives for further dissemination to their members.

The public consultation exercise was held between May and June 2024. To ensure awareness of the consultation and the process for responding, the Council's Corporate Communications Team issued several press releases, as well as regular social media posts. Consultation Facebook posts on the Council's page were shared around 200 times, including by industry and many Community Councils.

A total of 525 comments from around 140 respondents were submitted to the online consultation platform.

- 6.2 The key themes raised during the consultation stage are summarised in **Appendix 2**.

Strategic issues raised include:-

- general agreement about the vision with some feeling that the strategy lacks detail on how the Council will help achieve it;
- not enough reference given to several considerations including infrastructure capacity pressures, the climate emergency, workforce and housing shortages;
- greater consideration and priority given to communities and the environment
- lack of information on how the delivery of the strategy will be measured and monitored; and
- priority activities for the Council should include improving transport infrastructure and services, greater enforcement (particularly around motorhomes and wild campers), access ranger service, skills and business support, public toilet provision.

A number of additional comments were submitted which relate specifically to the proposed Visitor Levy in Highland. While these comments were not directly relevant to the strategy, they have been considered in the preparation of the proposed outline visitor levy scheme.

6.3 Consultation feedback has informed the proposed strategy document in-line with our collaborative approach:-

- refinements to the Ambition to give greater recognition of communities and the environment;
- greater clarity over the timescales of the strategy;
- clearer reference to the Council's aim of co-investing with others in the sector, including infrastructure and service initiatives;
- 'Focus Areas' introduced to better structure and more clearly prioritise Council activities going forward;
- greater recognition and a clearer stance on headline issues such as effective visitor management, climate change and environmental protection, housing and a skilled workforce;
- inclusion of case studies to add depth and demonstrate good practice; and
- greater detail added on how the Council intends to deliver and monitor the strategy.

A wide range of Council services have contributed to considering the comments made and assisted in refining the strategy. VisitScotland have also provided invaluable input.

## **7 Sustainable Tourism Strategy**

7.1 The sustainable tourism strategy presented for approval is set out in **Appendix 3**. Its purpose is to set out the Highland Council's long-term ambition for a sustainable tourism sector and its role in doing so. It informs how the Council will work with others and where it can invest its resources, including future income streams such as the visitor levy and any other external funds which can be secured.

7.2 It establishes the long-term ambition of the Council, including the following revised vision statement which seeks to emphasise partnership working at its heart:-

***Our vision is to maintain and grow a thriving visitor economy which is responsibly managed and delivers positive impacts for our communities and environment. We will work closely with a wide range of industry partners to continue to make Highland the destination of choice – regionally, nationally and globally.***

7.3 The vision is supported by the following four priority outcomes:-

1. **Communities** – *tourism must be a force for good for all Highland communities and a means to improve our quality of life, enhance our culture and heritage, provide high quality job opportunities and careers for Highland people and address demographic challenges.*
2. **Environment** – *Highland to be a leading example of a climate-resilient tourism destination, which has taken responsibility for and the necessary actions to ensure tourism enhances the natural environment while addressing the risks and impacts of climate change.*
3. **Economy** – *a vibrant, dynamic and resilient industry that develops attractive careers and job opportunities, has year-round appeal, is spread evenly across the region and contributes towards a greener future.*
4. **Visitors** – *visitors embracing a more relaxed pace of travel, are conscious of and act responsibly towards our local heritage, communities and the environment, have exceptional and authentic experiences across Highland and are met with a warm Highland welcome generating high levels of visitor satisfaction, repeat visits and positive advocacy for the region.*

7.3 The strategy outlines five areas of focus that will shape how the Council will organise itself and prioritise its resources:-

- effective visitor management - Infrastructure and services;
- protecting our environment;
- unlocking tourism benefits for our communities;
- celebrating our culture and heritage; and
- business growth and a skilled workforce

7.4 Section 6 of the Strategy sets out the factors which need to come together to successfully deliver this strategy. With the current resources available to it, the Council is not able to support the tourism sector in the traditional way. The Council therefore needs to prioritise and maximise the available resource and direct it to those services most in need. A proactive approach to partnership working and co-investment with public agencies, the private sector and communities will be critical to achieving the vision set out in the strategy.

## 8 Next Steps

8.1 The strategy forms one step in a multi-layered approach to working with others towards transitioning to a more economically sustainable and climate conscious tourism sector. The next key step for the Council will be to create an accompanying delivery programme. This document sets out short, medium and long-term investment plans to help deliver the ambitions contained in the strategy. The delivery programme will be influenced by the resources available to the Council and those that others are able to contribute.

8.2 It is important to acknowledge the opportunities that may be delivered by the introduction of a Visitor Levy. The Council is proposing to undertake a substantial public consultation on the visitor levy over the coming months. It is anticipated this will invariably stimulate interest on the wider tourism sector and the role of the Council. As such, it is recommended that consideration is given to reviewing the Sustainable Tourism Strategy following the visitor levy consultation, if there is merit in doing so.

Designation: Assistant Chief Executive - Place

Date: 31 October 2024

Author: Douglas Chisholm, Tourism and Inward Investment Team  
Leader  
Alan Webster, Economy and Regeneration Manager

Background Papers: E&I Committee 17 August 2023  
E&I Committee 2 May 2024

Appendices: Appendix 1 – Integrated Impact Assessment  
Appendix 2 – Summary of comments received during the public  
consultation  
Appendix 3 – Sustainable Tourism Strategy

# Integrated Impact Assessment Screening

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## About proposal

**What does this proposal relate to?** Strategy

**Proposal name:** Sustainable Tourism Strategy

**High level summary of the proposal:** The Sustainable Tourism Strategy is to set out and better coordinate the wide role in which The Highland Council plays in supporting a sustainable and thriving tourism industry. It will set out the Council's vision and priorities for tourism in Highland, and how the Council will help to achieve these and best support the industry with the many opportunities and challenges it faces. The strategy will also provide the basis for decision making on how available resources are best utilised.

**Who may be affected by the proposal?** All Highland Council residents, businesses, and visitors.

**Start date of proposal:** 01/08/2023

**End date of proposal:** 14/11/2024

**Does this proposal result in a change or impact to one or more Council service?** Yes

**Which Council services will be impacted by this proposal?** Corporate, People, Place

**Does this relate to an existing proposal?** No

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**Sign off date:** 2024-10-30

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# Equalities, poverty, and human rights

## Protected characteristics

Select what impact the proposal will have on the following protected characteristics:

**Sex:** No impact

**Age:** No impact

**Disability:** Positive

**Religion or belief:** No impact

**Race:** No impact

**Sexual orientation:** No impact

**Gender reassignment:** No impact

**Pregnancy and maternity:** No impact

**Marriage and civil partnership:** No impact

**Protected characteristics impact details:** One of the aims of the sustainable tourism strategy is to set the strategic focus for continuing to improve issues surrounding accessibility and connectivity at and between visitor destinations and settlements to create an environment that is usable by all and which reduces inequalities.

## Poverty and socio-economic

What impact is the proposal likely to have on the following?

**Prospects and opportunities:** Positive

**Places:** Positive

**Financial:** No impact

**Poverty and socio-economic impact details:** A key part of the sustainable tourism strategy is to ensure tourism is a positive force for our communities and businesses. The strategy outlines a range of focus areas which the Council will seek to deliver, many of which will have direct or indirect positive impacts on lead poverty and socio-economic factors. Some of these include;

- Work with partners and the house building industry to find innovative ways of addressing the complex and often deep-rooted housing challenges within the region, particularly in relation to improving access to quality affordable homes in areas of need and supporting our rural areas and businesses to thrive.
- Work with relevant stakeholders to deliver the Council's Community Wealth Building Strategy that will help communities and Highland businesses to take advantage of the growth of the tourism industry, capturing the economic and social benefits, wellbeing, reduce inequalities, and deliver improved outcomes for people in Highland.



- Help to empower communities by facilitating discussions and assisting to develop plans and proposals for their local area which identify aspirations and ambitions for future change ensuring tourism is a central ingredient.
- Help to create jobs and pathways towards sustainable employment in the tourism sector
- Work with partners to develop and maintain an affordable, reliable and convenient transport network in line with the National Transport Strategy and forthcoming Local Transport Strategy.

## **Human rights**

**Which of the below human rights will be affected by this proposal?**

**What impact do you consider this proposal to have on the human rights of people?** No impact

**Human rights impact details:**

## **Equalities, poverty and human rights screening assessment**

**What impact do you think there will be to equalities, poverty and human rights?** Positive impact

**Is a Full Impact Assessment required?** No

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## **Children's rights and wellbeing**

**What likely impact will the proposal have on children and young people?** The Council does not anticipate any impacts on children's rights and wellbeing.

**Which of the below children's rights will be affected by the proposal?**

**Explain how the children's rights selected above will be affected:**

## **Children's rights and wellbeing screening assessment**

**What impact do you think there will be to children's rights and wellbeing?** No impact

**Is a Full Impact Assessment required?** No

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## Data protection

Will your proposal involve processing personal data? No

### Data protection screening assessment

What change will there be to the way personal data is processed? No personal data will be processed

Is a Full Impact Assessment required? No

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## Island and mainland rural communities

Does your proposal impact island and mainland rural communities? Yes

Could people in island and mainland rural communities be affected differently? Yes

**How could the impact differ?** Many of Highland's island and mainland rural communities have experienced higher levels of adverse impacts from the growth in tourism. This Strategy aims to set out and better coordinate the wide role in which The Highland Council plays in supporting a sustainable and thriving tourism industry. Key to this is helping address the challenges and ensure that tourism is a positive force for change, particularly for our more rural communities. These positive impacts will become more apparent when the proposed delivery plan is developed.

Have any negative impacts been identified? No

### Island and mainland rural communities screening assessment

What impact do you think there will be to island and mainland rural communities? Positive impact

Is a Full Impact Assessment required? No

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## Climate change

Does the proposal involve activities that could impact on greenhouse gas emissions (CO<sub>2</sub>e)? No

Does the proposal have the potential to affect the environment, wildlife or biodiversity? No

Does the proposal have the potential to influence resilience to extreme weather or changing climate? No

**Provide information regarding your selection above:** It is not anticipated that the strategy will give rise to any negative impacts on climate change. A focus area of the strategy is to contribute positively to addressing climate change and the protection of the environment in its activities within the tourism sector. Given the high-level nature of this strategy, there is limited ability to assess the degree of these positive impacts. These positive impacts will become more apparent when the delivery plan is developed.

## **Climate change screening assessment**

**Have you identified potential impact for any of the areas above or marked any as not known? No**

**Is a Full Impact Assessment required? No**

### Summary of comments received on during the public consultation

#### Question 1 - Do you feel the Council has missed any strategic factors that impact the tourism industry?

##### Main issues raised:

- One of the most common issues raised was that poor condition of roads and wider infrastructure. This contributes to access issues for tourists and residents alike. There is a lack of capacity and facilities to accommodate visitor numbers, leading to pressure on specific areas which in turn impacts on the environment, the climate, communities, including day-to-day lives of residents, and the overall visitor experience.
- Fragility of the tourism and hospitality industry, which is facing increasing costs, lower profit margins, and increasing concerns over the price competitiveness of the region.
- The increase in motorhomes and campervans has led to traffic problems, irresponsible and antisocial behaviour, environmental impacts and huge pressure on public infrastructure. They are seen as contributing the least to the area.
- Tourism is putting pressure on the housing market. Lack of worker accommodation. This is manifesting itself with accommodation shortages/higher costs for locals and seasonal staff which, in turn, impacts on population retention.
- Renewable energy developments were seen as having a negative impact on the landscape and environment which was eroding the visitor appeal of rurality.
- Growth opportunities missing, such as agritourism and ecotourism, and specific growth sectors, such as sports/golf and food and drink/whisky.

#### Question 2 - Do you agree with the Council's vision for the next 10 years?

##### Main issues raised:

- General support for the vision but calls for a greater level of ambition and much clearer actions and commitments from the Council on how it seeks to achieve the vision.
- Several additional points that received a lot of traction were made include constant growth and year-round tourism was often equated to 'over tourism' and therefore seen as counterproductive and unsustainable. Improvements to public transport, toilets and infrastructure are essential and would go some way to alleviating the issues currently encountered.
- Greater recognition needed on climate change and protecting the environment which was seen as fundamental to the appeal and sustainability of the sector and the region.

- Better balance needs to be struck, with communities (and the environment) being put ahead of tourism/visitors.
- To deliver the vision, visitor numbers need to be controlled (particularly those not in paid accommodation sites), with greater enforcement and need to move away from 'mass tourism'.

### Question 3 - Do you agree with the Council's strategic priorities?

Main issues raised:

- There was general support for the Council's strategic priorities, but there were some common issues raised.
- It was felt that there was no consideration on the impact of renewable energy development across Highland and the impact which it is having on the visitor economy. Environment and landscape need to be protected.
- Priorities need to be less high level and generic and linked to other initiatives, priorities, workstreams. How priorities will be achieved and monitored is lacking and is required.
- More emphasis is required on delivering high-quality year-round jobs, skills and business support, affordable housing and infrastructure
- How to tackle and generate income from non-paying visitors such wild/dirty campers, cruise ships and campervans needs more clarity. Suggestion of more Access Rangers.

### Question 4 - Do you agree with the Council's list of activities and their priority order?

Main issues raised:

- Road maintenance, improved public transport and infrastructure improvement (housing, active travel, digital & toilets), especially in rural areas, was the most popular comment
- Priorities need to be suitably enforced, managed and accessible. The Access Ranger service played a vital role in protecting the environment and behavioural education, but it needs greater enforcement powers.
- Business support, protecting communities and community programmes should be a higher priority than enhancing the visitor experience.
- More focus required on managing impact of day trippers, campervans and wild campers. Greater control is required over where motorhomes can park overnight with a motorhome enforceable permit system and increase number of Aires.
- More focus on activity that protects the environment and more emphasis on net zero, promotion of slow tourism and active travel. Tourism operators should be encouraged to adopt net zero technology.
- More focus on skills, business support, education, careers and workforce shortages. More work in schools with a focus on the industry. Training, decent wages, greater childcare service support is required.

## Question 5 - Do you agree with the approach to delivering the strategy?

### Main issues raised:

- The inclusion of a levy on cruise ships and motorhomes was the most popular theme in this section. Some suggestions were forthcoming on how a motorhome levy would work, such as use of automatic number plate recognition, a special toll or a Scotland wide mandatory permit system.
- Need to make tourism pay for the facilities it needs (such as the visitor levy) rather than taking money from other local services – local authority budgets need to be prioritised for local people and not subsidising visitors
- Lacks reference to a monitoring and review framework for the strategy
- Greater acknowledgement of partner agencies and partnership working, with opportunities to would widen out to local communities, DMO's, BID's and small businesses. More detail was requested around how the proposed approach will be delivered.
- Further comments about the need for more focus around how the strategy and vision will be delivered. A delivery programme with actions was seen as helpful as was exploring funding options beyond the core Council budget or mechanisms to align council spending with that of other bodies to achieve a greater impact. This was seen as moving away from any “business as usual” criticism.
- Infrastructure improvement around toilets and parking was also a common theme as was enforcement.
- A need to address big business and the impact large scale renewable energy development will have on the tourism industry was raised by several individuals.

## **Appendix 3**

# **SUSTAINABLE TOURISM STRATEGY 2024-2030**

**The Highland Council**

# Foreword

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Foreword to be inserted following committee.



Cllr Ken Gowans  
Vice Convener, The Highland Council  
Chair Economy & Infrastructure



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# 1. Summary

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Tourism in Highland has been a major success story. It has seen near year-on-year growth for 20 years and attracted 8.4 million visitors in 2023, its highest yet. It has become a world leading destination, known for its natural environment, landscapes and unique culture and heritage.

Its growth has given rise to a wide range of opportunities and challenges. It is a cornerstone of our economy, employing over 21,000 people in every part of Highland and helping to sustain our communities. Yet the environmental impacts of tourism, plus the pressure put on communities, infrastructure and services, pose significant challenges.

Positive strides have been made to address these impacts but collectively we need to do more to ensure we have a responsible and thriving tourism sector which is able to adapt, innovate and deliver positive benefits for communities, our environment and our economy.

Over the coming years, significant sums of money will be invested in the sector in Highland by the private sector, public agencies, and through community led schemes. This offers huge opportunity for the region, and the Council is actively exploring ways to work in partnership with others and co-invest to maximise available development opportunities, leveraging expertise and resources to propel its ambitious growth objectives.

The Highland Council has a pivotal yet distinct role to play. The purpose of this strategy is to set out the Highland Council's long-term ambition for a sustainable tourism sector and contribution up to 2030 and beyond. It will shape how the Council will work with others, invest its resources, and co-invest with partners, including future income streams such as the visitor levy and any other external funds which can be secured.

The strategy forms one step in a multi-layered approach to working with others towards transitioning to a more economically sustainable and climate conscious tourism sector.

The next key step for the Council will be to create a delivery programme to set out short, medium and longer term investment plans to help deliver the ambitions in this strategy. This delivery programme will be influenced by the resources available to the Council, co-investment, and those that others are able to contribute.

## 2. Sector overview

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### Positive trends

**Visitor numbers** - Highland has seen significant growth over recent years, with the total number of visitors increasing from 5.1 million in 2012 to 8.4 million in 2023, an increase of 64.7%. In 2023 Highland was the third most visited region in Scotland by both international and domestic overnight visitors.

**Economic impact** – Direct spend from tourism in Highland increased from £1.382 billion in 2012 to £1.680 billion in 2023, an increase of 21.6% (index linked).

**Employment** – The number of people in Highland directly employed within tourism has risen from 16,820 in 2012 to 21,784 in 2023, a 29.5% increase representing around 17.8% of the Highland wide workforce.

**Domestic and international tourism** – Whilst the cost-of-living crisis and other factors are affecting consumer decisions, there is still strong domestic demand and the Highlands remains a popular destination, particularly with more affluent visitors. Tourism has been outperforming the wider global economy, with consumers prioritising – and prepared to pay a premium for – personalised, authentic holiday experiences. As such, our rich heritage, culture and landscape continues to draw tourists from across the UK and internationally. VisitScotland data shows Highlands' overnight visitor market sits at 53% international visitors compared to 47% domestic visitors.

**Investment in the region** – Major investment has been made in the tourism sector in Highland by the private sector (e.g. accommodation, food and drink, outdoor activities) and the public sector (from carparks, toilets and motorhome waste provision to the pipeline projects such as the £35.9million transformation of The Inverness Castle Experience, a dedicated visitor centre celebrating what makes the Highlands of Scotland) and the development of The Storr on Skye which includes over £2m investment towards, parking, toilets, footpaths, EV charging, motorhome and camper waste and the newly constructed Storr Centre.

### Lead drivers

**Landscape and scenery** – Highland's iconic rugged and dramatic landscape is the most popular reason for visitors choosing the area. Whether it's to view the mountainous wilderness of the west coast, or to take in the vast open landscapes of

the northeast or experience the heather moorlands and magnificent forests of Cairngorm National Park, the Highland landscape has something to offer everyone.

**Culture and heritage** – The distinct cultural heritage of the Highlands, from traditional music to the Gaelic language, to rich archaeological and geological sites and built heritage, is world renowned and one of the main reasons why people visit the region.

**Sports and outdoor adventure** – Outdoor activities rank third in the top ten reasons for visitors choosing Highland in VisitScotland’s research. Our varied geography offers a wealth of opportunities for sport and outdoor adventure from kayaking to golf. This is one of the reasons why the Highlands is regularly voted as one of the best destinations to visit in the world by leading travel organisations.

**Food and drink** – The food and drink industry is one of the largest industry sectors in Highland and filters through many of our businesses from cafes, and restaurants to agritourism farms. Highland produces a range of high-quality ingredients that contribute to some of world’s finest products including Scotch whisky, seafood and gin to name a few. Highland particularly benefits from a strong competitive advantage associated to place, people and provenance which attracts new and returning visitors to indulge in the Highland offering.

**Ancestral tourism** - is a growing and important market for Scotland. At least 40 million people across the globe are able to lay claim to Scottish ancestry. The main ancestral tourism source countries for Scotland are the USA, Canada, and Australia. Over 25% of respondents of these countries cited Scottish ancestry as a major motivation for their trip.

**Screen tourism** – Set jetting remains a strong travel trend and the growth of the film industry in recent years, coupled with the success of promoting Highland as a filming location, has been a powerful tool in attracting visitors to the region.

**Marine market** – Highland continues to welcome record numbers of ships and passengers from the cruise industry offering visitors a gateway to the Highlands. Invergordon is Highlands largest port with 2023 attracting 125 vessels and 200,000 seaborne tourists boosting the region’s economy by an estimated £20million. The sailing and boating sector are other huge growth sectors with an estimated £84 million in Gross Value Added (GVA) to the Scottish Economy, supporting 3,100 jobs across the sector.

## Opportunities ahead

**Size of the market** – With the scale and rich diversity of the Highland market and such strong travel trends, it offers huge economic potential for existing businesses and inward investment and collaboration in the sector, with particular opportunities in high quality, cultural and authentic experiences.

**Responsible tourism** – As tourists become increasingly socially and environmentally conscious, this presents a huge opportunity (and need) for locations such as Highland, which are known for their natural beauty, to be at the forefront of this change.

**Enhancing iconic sites and unlocking potential** - There are many locations where opportunity exists to improve the visitor offer, help extend the season and derive more spend. Whereas lesser-known places such as parts of the east coast remain largely underdeveloped from a tourism perspective when considering the local assets and capacity. Sites such as the Flow Country in Caithness and Sutherland which now has UNESCO World Heritage Site status is a great opportunity to drive visitors to the east coast of Highland, but this must come with a sustainable approach to planning and management.

**Authentic tourism** - Visitors are also seeking out experiences that are genuinely rooted in place and tradition. There is opportunity for Highland to embrace its culture and heritage traditions and offer more authentic experience for visitors.

## Ongoing challenges

**Skills and workforce** - A skills and workforce shortage has emerged in recent years within the tourism and hospitality industry which is limiting its growth. Highland is especially vulnerable due to a combination of issues, including demographic challenges, the rural nature of the region, reliance on foreign workers and the lack of available housing.

**Housing shortage** -The lack of available and affordable housing has been brought on by a range of factors and is now a challenge affecting many of our communities. It is anticipated that 24,000 new houses will be required in Highland in the next ten years to address future demand.

**Financial pressures** – The economy has been hit hard by rising inflation, the cost of finance, increased energy costs, tight labour market, and subdued economic performance. This has caused a cost-of-living crisis which has impacted consumer behaviour with a corresponding escalation of operating costs which is affecting the

viability of many businesses and public sector service provision. Alongside this, most public sector budgets are being continually eroded.

**Visitor management pressures** – Highland is experiencing high concentrations of visitors/vehicles in many areas across the region where the carrying capacity or infrastructure available is not able to cope or keep pace with demand. In some cases, this is presenting major challenges to communities and the environment.

**Environmental impacts of tourism** – While a main economic driver for Highland, the relationship between tourism and the environment continues to be complex. Decisions and activities undertaken by a visitor can have adverse effects on the natural environment they visit such as additional ecological degradation, increased pollution and carbon footprint. Tourism alone is responsible for 8% of the world's carbon emissions and continues to grow as more people travel each year.

### 3. Tourism Policy Landscape

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This tourism strategy does not sit in isolation but has been designed to align with the wider policy context. At a Scotland level, the national tourism strategy '[Scotland Outlook 2030](#)' was created collaboratively between representatives from the public and private sector in 2019 and sets out a framework for stakeholders to follow. It revolves around achieving several key priorities for creating a sustainable future and being a leader in 21<sup>st</sup> century tourism:

- **Passionate People** - attract, develop and retain a skilled, committed, diverse and valued workforce
- **Thriving places** - create and develop a sustainable destination
- **Memorable experiences** - best, authentic and memorable experiences
- **Diverse businesses** - build business resilience, sustainability and profitability

At a regional level, the Council's Programme sets out our vision and key strategic priorities for the next five years. The tourism and hospitality sectors are recognised as some of the region's greatest strengths and opportunities with priorities to promote the Gaelic language, cultural development and enhancing the Highland's rich heritage and culture. There is also a commitment to introduce a visitor levy. The [Cairngorm National Park Partnership Plan](#) will also be considered for the area of Highland which is covered by the national park.

The Council's [Tourism Infrastructure Plan](#) (2022) identifies key priorities for tourism infrastructure in Highland over the medium term. It provides a solid foundation for how we might invest in the region's infrastructure if funding is available. Cairngorm also developed a similar [Tourism Infrastructure Plan](#) for the National Park, with certain projects within the Highland region.

At the local level, this strategy recognises Area Place Plans and other community-scale plans which set localised priorities and projects, many of which relate to the visitor economy.

We also recognise the wide array of plans prepared by our partners which hold valuable information on their ambitions and strategies for the future. Many of these have been reviewed as part of preparing this strategy and the Council will endeavour to do what it can to help deliver those elements it can influence.

## 4. Our Ambition

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**Our vision is to maintain and grow a thriving visitor economy which is responsibly managed and delivers positive impacts for our communities and environment. We will work closely with a wide range of industry partners to continue to make Highland the destination of choice – regionally, nationally and globally.**

The priority outcomes the Council wants to help achieve include:

1. **Communities** – tourism must be a force for good for all Highland communities and a means to improve our quality of life, enhance our culture and heritage, provide high quality job opportunities and careers for Highland people and address demographic challenges.
2. **Environment** – Highland to be a leading example of a climate-resilient tourism destination, which has taken responsibility for and the necessary actions to ensure tourism enhances the natural environment while, addressing the risks and impacts of climate change.
3. **Economy** – a vibrant, dynamic and resilient industry that develops attractive careers and job opportunities, has year-round appeal, is spread evenly across the region and contributes towards a greener future.
4. **Visitors** – visitors embracing a more relaxed pace of travel, are conscious of and act responsibly towards our local heritage, communities and the environment, have exceptional and authentic experiences across Highland and are met with a warm Highland welcome generating high levels of visitor satisfaction, repeat visits and positive advocacy for the region.

These outcomes are interconnected, and each one need to be met to achieve the vision. It is not only vital for the sector but also for its contribution to wider objectives, including reversing the demographic challenges facing the region and tackling climate change.

Although this strategy has a central focus on the role of the Council, success demands a positive and effective relationship between communities, visitors, businesses and the environment, and co-investment from across the sector. This ensures we maximise the energy and resources available.



## 5. Our Focus Areas

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The Highland Council provides a range of public services which support the tourism economy and the communities and places it relies on. A successful tourism sector is one that has well-resourced and efficient delivery of Council services.

This section outlines the five focus areas which will shape how the Council prioritises its efforts and resources. These are centred around sustaining public services and infrastructure to ensure the impacts of tourism are strategically and sustainably managed; supporting the delivery of a thriving sector in partnership and co-investment; and, developing innovative approaches to balance strategic demands and opportunities to ensure the region remains world-leading, competitively attractive and climate-resilient for our visitors, residents and businesses.

### **A. Effective visitor management - Infrastructure and services**

**At the centre of sustainable and responsible tourism lies effective visitor management. By managing visitors well, a destination can minimise the negative effects on the local community and maximise the opportunities for them to benefit. As visitor numbers in Highland continue to increase this has led to, in some areas and at certain times of the year, pressures on the environment and communities, and inevitably lessens the visitor experience. In response to this, the Council will focus on sustaining and developing the infrastructure and services as well as accessibility across the region through the following activities:**

#### **Countryside management services and outdoor access**

Many of our visitors want to explore all corners of the region and take advantage of Scotland's 'right of responsible access' sometimes called 'the right to roam'. This is reflective with hiking being one of the top three activities undertaken by visitors in the region. However, this can lead to various problems, such as limited transport capacity and degradation of paths and the environment. Most visitors behave responsibly, 'leaving no trace' and connecting with local communities and businesses. Unfortunately, there are always a minority who don't respect their surroundings.

Managing these pressures is a high priority for everyone involved. Addressing the shortage of infrastructure and increasing capacity for visitors is one of the main solutions. Feedback from the public and partner agencies highlighted the value

placed on the Council's Access Ranger Service who, positioned at the heart of our communities, provide a point of contact to welcome and educate visitors and help manage visitor pressures. As the service is not a statutory function of the Council it has varied in scale and coverage over the last number of years as pressures emerge and budgets become available.

The Council will focus on:

- Encouraging all visitors to be responsible and follow the advice of the Scottish Outdoor Access Code
- Reviewing opportunities to deliver Access Ranger services, subject to funding being available
- Exploring ways to increase our visitor management enforcement powers
- Better management and education of visitors then monitor and address impacts
- Continuing to participate in Scotland's national visitor management group and support the delivery of actions that are relevant to Highland
- Continuing engagement with the Cairngorms National Park Authority and related local Visitor Management groups with the potential of continuing to fund joint initiatives.
- Continuing development, maintenance and promotion of the existing path network to benefit visitors and communities
- Supporting opportunities to make the long-distance routes more attractive through better maintenance, route improvements and promotion

### **Case Study – Seasonal Access Rangers**

The seasonal access ranger service was created in 2021 during a period of exceptional rebound of visitors during and post the covid-19 pandemic. The aim of the service was to engage with people visiting the Highlands through patrols and visitor engagement across the whole of the Council region, with the exception of the Cairngorm National Park who operate a separate ranger programme.



Rangers offered a friendly and welcoming approach to engaging with the public to inform and educate people about access rights, wild camping, overcrowding, parking - including overnight parking in motorhomes - littering, fires, damage to

trees and outdoor toileting. At the same time, they also collected data on visitor numbers and capacity issues especially at popular sites. In between patrols the Rangers address some of the environmental damage on the landscape and would liaise with communities and landowners when issues arise, working together towards solutions.

### **Sustainable transport network**

Efficient transport networks play an essential function in the movement of visitors across a destination. With Highland covering a third of the land mass of Scotland and being a gateway to the north and the islands, there is a complex network of roads, rail, air and marine links across the region. While the responsibility for these lies across several public agencies, the Highland Council has a vast remit for managing and maintaining core parts of the network, including over 6,700km of road and 1,700km of footways.

In many parts of Highland, the network, in particular roads, have seen huge growth in traffic numbers, largely driven by increasing visitors. Many of our roads were never designed for so many vehicles, with narrow carriageways and few laybys, passing places and parking areas. Insufficient capacity and maintenance of the transport network has caused various issues, including congestion and damage to the roads, and conflict between users.

To resolve these issues and develop a transport network that supports climate-conscious tourism requires resource and collaboration with partners. This includes expanding low-emission vehicle charging infrastructure, promoting active travel options such as walking and cycling, and improving public transport services. Our goal is to make sustainable and climate-friendly travel the default choice for visitors and residents alike.

Looking forward, the Council will focus on:

- Working with partners, including the Regional Transport Partnership to develop and maintain an affordable, reliable and convenient transport network by investing in line with both the Sustainable Transport Hierarchy and the Sustainable Investment Hierarchy
- Developing a new Local Transport Strategy that aims to deliver a low carbon transport system that is sustainable, inclusive, safe, resilient and accessible for people and freight and adapt to the impacts of climate change resulting in user-friendly travel options for both those working in the sector and visitors to

the region, making it easy to move around and explore in a sustainable manner.

- Implementing the Highland Investment Plan to deliver necessary transport infrastructure and maintenance, including park and ride facilities utilising the Council's in house bus service and private sector partners.
- Undertaking a review of the Council's parking policy and strategy document to ensure parking is effectively managed and planned for and new facilities are added where required.
- Exploring ways of building connections between the public sector and industry groups which have the greatest influence over how visitors use and impact on our road network to find solutions to our transport pressures

### **Motorhomes, campervans and roof tents (Recreational Vehicles)**

Holidaying in a motorhome or campervan has become an increasingly popular trend across the UK with many of these vehicles travelling to the Highlands. While the huge growth in the market has seen an increase in spend regionally, many areas of Highland are also experiencing some of the challenging pressures that have come with this style of holiday such as irresponsible and inappropriate overnight parking, unsuitable locations for disposing of waste, antisocial behaviours and high volumes of litter where commercial campsites have not been used.

While the Council recognises the importance of existing facilities across Highland, it also appreciates that some visitors are keen to "get away" from the traditional campsite experience and therefore should consider a variety of solutions for managing motorhomes and campers more effectively.

We will focus on:

- Working with partners to gather better intelligence on campervans, conversions, roof tents and motorhomes to better inform future decision making
- Continuing to lobby and explore options for a levy on motorhomes and campervans or other mechanisms to charge those not on formal sites.
- A coordinated approach with partners to disseminate suitable information around recreational vehicles
- Exploring options to better use Council assets for recreational vehicle provision, e.g. public conveniences that could accommodate additional waste provision
- Better signposting of existing recreational vehicle infrastructure and services

- Exercising powers of enforcement for inappropriate waste management

### Case Study – Motorhome and Campervan Waste Services

The Council developed a [Tourism Infrastructure Plan](#) in 2022 to identify, coordinate and prioritise capital projects across Highland and this helped secure £7.5million from the Scottish Government’s Rural Tourism Infrastructure Fund.



Fort Augustus

The Council has used this funding to deliver a range of high-quality visitor management infrastructure in iconic sites around Highland. As part of this funding the Council was able to support the delivery of multiple Motorhome waste facilities adding to the geographical spread of private, public sector and community managed facilities.



Mallaig

### Waste Management

The Council’s Waste Management service operates in a highly regulated environment and is the largest business waste and recycling collection service provider in the Highland Council region. This regulatory regime covers the type of collection services that must be provided to households and were requested to businesses. Additionally, the Council duties extend to keeping land (publicly accessible land and under the Council’s direct control) free of litter and refuse.

The hospitality and tourism sector combined is one of our largest customer types with approximately 3,500 premises receiving recycling collections of paper, card, plastic and metal containers. It is a requirement for all our business waste customers to participate in recycling collections to ensure they are complying with The Waste Regulations (Scotland) 2012 legislation. This helps to drive recycling rates from businesses and reduces waste sent for disposal.

Highland Council business waste customers are also permitted to recycle their glass bottles and jars (free of charge) throughout the network of Recycling Points across the region. Food waste collections are also being further extended.

In Highland, there is also often pressure on the existing network of public litter bins and capacities during peak periods. This can lead to environmental impacts from unlawful littering and/or fly-tipping. In many areas, there is also limited convenient recycling “on the go” for the public and, particularly within remote rural areas, and the Council’s Waste Management Service has limited ability to quickly respond when issues arise.

The Council’s aim is to provide a dynamic and innovative waste management function across Highland that supports our tourism industry (including direct service delivery, business waste collection and litter picking) to ensure our world class environment is protected, enhanced and enjoyed by residents and visitors.

To achieve this, we will focus on:

- Aligning to a national litter strategy, towards a Litter-Free Scotland, which encourages litter prevention through measures which influence individuals’ behaviour
- Providing a seasonally enhanced effective and efficient service that will pay particular focus on known “hot spot” areas
- Improving our litter bin network provision and where possible increasing the frequency of collections at key tourism sites.
- Supporting the sector with advice to help tourism businesses to improve recycling, reduce waste and move towards a more circular business model.

### **Public Conveniences**

Public conveniences play an important role in shaping the visitor experience and can provide an important service for residents and businesses. In some cases, the amenities available will determine whether a visitor will return to a destination or positively recommend a destination to others. The Highland Council has developed an Approach to Public Conveniences and Action Plan 2024 - 2034 which sets out a framework for the provision of public conveniences within The Highland Council area over the next 10 years.

The Highland Council currently operates 74 non-statutory but highly valued public conveniences and has 53 comfort schemes agreements with local businesses and community groups across Highland. These come with a number of challenges such as ongoing and increasing running costs; property condition and suitability; anti-social behaviour and vandalism; inappropriate use of facilities. Limited visitor awareness of these facilities also can lead to inappropriate outdoor toileting behaviour.

While the Council will continue to sustain the existing provision available, going forward, the Council will focus on:

- Exploring the use of sustainable building materials in all new and refurbished facilities to reduce the overall environmental impact
- Utilising water-saving technologies and renewable energy wherever possible
- Improving the condition and suitability of existing public conveniences, e.g. making provision more accessible
- Improving coverage, where there is visitor demand, this will include solutions working with communities and businesses, e.g. via additional comfort schemes
- Improving awareness and better signposting of public conveniences and comfort schemes available to visitors through various communication channels
- Striving to have no more than a 20-minute journey between available public conveniences

### **Case Study - Achmelvich Beach Toilets**

Achmelvich beach, situated on the northwest coast of Highland is a site of significant scenic beauty that has seen an increase in visitors since it became a prominent spot on the North Coast 500 route. This increasing popularity led to pressures on the existing car park and the single unit toilet block.



The need to replace the toilet block had been accepted as part of regional planning within Highland Council for many years and was identified as a key project in the Highland Council's Rural Tourism Infrastructure Development Plan.



Over £1M has since been invested in the site from The Highland Council and VisitScotland's Rural Tourism Infrastructure Fund to extend the car park and replace the single toilet unit with a new seven cubicle toilet block and outside showers, demonstrating a great example of internal and external investment in our local infrastructure.

## **Communications – getting the right messages across**

Destinations heavily rely on effective marketing and communications to attract and manage visitors. While VisitScotland, the private sector and Destination Management Organisations (DMOs) take a leading role in attracting people here, the Council can play an important role in shaping the visitor experience.

The Council can support the promotion of responsible behaviour and connect visitors with communities when they are in Highland. This can include the promotion and provision of educational and public information and guidance. However, the Council has limited reach on its own and to deliver effective impact or behavioural change requires collaboration and coordination with partners and industry representatives to agree the messaging and approach.

The Council will focus on:

- Working with partners, communities and key industry stakeholders to better define the messaging and agree a coordinated approach to disseminate suitable information to educate and inform visitors
- Work with partners to explore new ways of effectively communicating with visitors to ensure responsible tourism
- Identifying new ways of bringing disparate interests across the sector to work together to reach visitors
- Being proactive and celebrating the areas where good progress has been made

## **Digital innovation**

Improved digital connectivity is central to Highland economic growth and community resilience. In an era where digital innovation is rapidly advancing, tourists are becoming increasingly more dependent on the information and experiences available to them digitally to immerse themselves in a destination. In line with Scotland Outlook 2030, The Council want to see Highland better connected physically and digitally to allow all visitors to discover, experience and share all of what the region has to offer. This is also particularly important in delivering successful visitor management tools that will support visitors on their journey.

The Council will focus on:

- Supporting Scottish and UK Government initiatives to ensure maximum digital connectivity across the area.

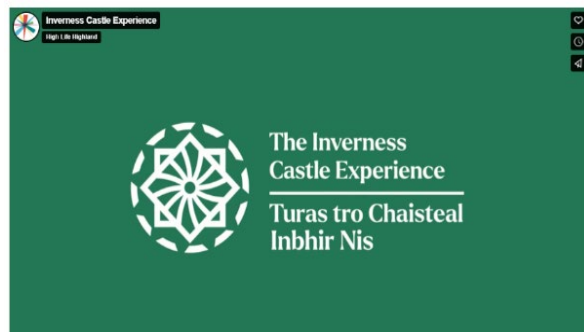


- Working with partners to explore how technology might improve visitor management and the visitor experience as they travel and explore Highland
- Enabling council services to deliver digital innovation to improve service delivery for the sector.
- Exploring new tourism data sources to better inform future investment decisions, while still continuing to use [STEAM](#) data to allow effective benchmarking.

### Case Study – Inverness Castle Experience

The vision for Inverness Castle Experience is to create a sustainable and digitally innovative must-see visitor attraction that celebrates the ‘Spirit of the Highlands’, its creativity, culture, heritage and landscape.

Transformed from its original use as the home of inverness’ prison and courts the castle will be a landmark attraction for the city which will draw new and repeat visitors from around the world, showcasing a celebration of what makes the Highlands of Scotland a special place to live, work and visit and inspiring them to visit other parts of Highland on their travels.



The Castle Experience will open to the public in 2025 and is expected to attract around 500,000 visitors per annum.

## **B. Protecting our environment**

**Tourism growth often creates stronger impacts on climate change and greater pressures on the environment. It is identified as one of the biggest contributors to greenhouse gas emissions. Despite this fact, reports show growing global demand for responsible tourism from increasing corporate responsibility, to consumer expectations, and with Highland already known for its clean and precious environment, there is a real opportunity for Highland to be a world leader in this field. All those operating in the tourism sector have a role in shifting visitor behaviour through leading by example and sustaining suitable infrastructure and services. The Council will concentrate on the following activities:**

### **Reaching net zero**

Tackling climate change is one of the biggest challenges facing our tourism and events sector. Severe weather and climate impacts are already affecting communities across the Highlands and service delivery provided by the Council. Transformational change is required across the sector with all stakeholders needing to take actions to mitigate and adapt, and for the Council to integrate climate change and sustainability measures into all operations and service delivery.

The Council is committed to leading by example in addressing the climate emergency and achieving net zero emissions. Aligned with Scotland's national target of reaching net zero by 2045, the Council aims to meet this goal even sooner, with interim targets of reducing emissions by at least 75% by 2030 and 90% by 2040.

To support this, the Council will implement and promote infrastructure and services that reduce emissions and build resilience within the tourism sector. This includes working closely with the industry to minimise its carbon footprint and contribute to a sustainable future.

The Council will focus on:

- Leading by example through developing innovative initiatives that raise awareness of climate action and sustainable practices
- Investing in low-carbon infrastructure, enhancing green spaces, and promoting practices that ensure visitors "leave only footprints"
- Providing advice and guidance support for tourism businesses in reducing their carbon footprint and transitioning towards net zero operations

- Implementing strategies to reduce emissions associated with waste management, enhancing recycling, and promoting responsible waste practices

By embedding these principles into all aspects of service delivery and encouraging collective action across the region, the Council aims to make Highland a leader in the journey towards a net zero future.

### **Case Study – EV Rally**

The Council helped secure the EV Rally of Scotland in 2023 and then again in 2024 when it took teams along the whole of the NC500 to showcase the infrastructure already installed across Highland. This includes over 100 EV charge points with many more planned as we move from a government funded approach to a sustainable, self-funding model.



The Council and other partners in the region have an ambition to ensure that access to EV charging is fair and equitable to all, regardless of where they live and work, being mindful of the challenges of local geography. Events like the EV Rally help promote climate action and the EV capabilities to both local residents and visitors to the region.

### **Protection and enhancement of the natural environment**

The Highlands is known for its stunning landscapes, natural environment and unique wildlife, and these are often the top reasons visitors choose to come here. However, as visitor numbers increase, it inevitably puts greater pressure on our environment, such as air and noise pollution, increased waste and litter, traffic congestion and additional pressure on important and often fragile habitats. Within this context, key to protecting, conserving and restoring the natural environment and ecological integrity is achieving a suitable balance between visitor pressure and capacity through appropriate management.

Examples such as the Flow Country World Heritage Site shows that tourism can be part of the solution to some of the challenges we face. We need to continue to work together with communities, businesses and partners to identify other opportunities which help protect and enhance our fragile habitats and species, tackle

environmental erosion and restoration, whilst also allowing tourism to grow and form a sustainable part of the future.

The Council will focus on:

- Improving and managing capacity sensitively through infrastructure and services at areas experiencing significant environmental impacts from tourism
- Promoting nature positive tourism development across the Highlands
- Delivering appropriate visitor management, enforcement practices, education, communications and promotion
- Seeking to spread visitors more evenly across the Highlands and to places which have capacity
- Continuing as a key partner in the delivery and operation of the Flow Country UNESCO World Heritage Site, and supporting other protected areas such as Cairngorm National Park, North West Geopark and Wester Ross Biosphere
- Delivering an Ecology Strategy and Action Plan that sets out an ambitious set of actions to tackle biodiversity loss and address the ecological emergency.

### **Case Study – Wick Circular Path Network**

The Wick Paths Group was set up in late 2017 as an offshoot of the Community Council to improve the path networks and the environment around the town of Wick.



In partnership with The Highland Council the group designed, developed and completed the final section of the South Head to March Road Circular Path, a 7km path network around Wick so that visitors and locals, alike, can enjoy the scenery, natural heritage and history of the town. This final section was unmade, eroded and notoriously unstable underfoot making it unsafe for residents and visitors. Part funded and supported by The Highland Council Access Team, the project demonstrates a great example of proactive partnership working with a local group of volunteers, dedicated to delivering a safe and enjoyable experience for residents and visitors while also protecting and enhancing the environment from continued deterioration.

## **C. Unlocking tourism benefits for our communities**

**Tourism can deliver real and varied benefits for our communities, but it can also overwhelm or simply pass-by other communities. When this happens, it can overshadow the positive impacts. Ultimately, tourism needs to work for everyone rather than the reverse and for some this may feel the case. We need to all work closely together to ensure tourism delivers for our communities and environment first. Top priorities for the Council are to help address the housing challenge in Highland, ensure tourism is a means of wealth building within our communities and that there is a clear and coordinated plan for each part of Highland.**

### **Tackling the Housing Challenge**

The Scottish Parliament declared a national housing emergency on 15 May 2024. This formally recognises the problems with the country's housing system and specifically the lack of affordable, quality housing supply. Many of the issues nationally – the lack of affordable new build supply, the rent rises in the private rented sector, pressures from homelessness demand – are also evident in Highland. However, the challenges faced within Highland, including those faced by the tourism industry, need urgent and specific local actions.

The growth in tourism has contributed to these pressures, particularly in rural areas due to a complex series of factors including conversion of existing stock to holiday accommodation, second homes, lack of available land for development, the high costs of construction and limited local contractors. The delivery of houses to support communities and unlock economic growth is a core priority for the Council. This is the reason the Council has taken steps and embraced innovative initiatives to address the housing challenge in Highland, such as our ambitious housing development programme, the Council's 6-commitments announced at the Housing Summit in October 2024, and our Swedish Timber Retrofit project.

A combined effort is underway to address and resolve the complex and often deep-rooted housing challenges within the region, particularly in relation to improving access to quality affordable homes in areas of need and supporting our rural areas and tourism businesses to thrive. The Council recognises that those working in the tourism industry have a need to live in their local communities. To try and address this it is proposed that some of the visitor levy income will be targeted towards assisting in the delivery of affordable housing options in rural communities. Specifically given the high cost of delivery in rural areas which has been identified in the council housing strategy and strategic housing investment plan.

The Council will focus on:

- Working with industry partners, our communities and the house building industry to find innovative ways of addressing access to quality affordable homes, in areas of demand, to sustain those who are living and working in the sector
- Addressing the Housing Challenge with partners following the October 2024 Housing Summit based on the Housing Challenge Action Plan which will be developed
- Exploring potential solutions to future housing supply which can be addressed through benefits flowing from the Social Value Charter from Renewables and from future retained business rates relating to the Green Freeport
- Reviewing our housing specification and approach to development to ensure that we are minimising, as far as possible, the cost of housing delivery in rural areas
- Exploring the opportunities to designate further short term let control areas throughout the Highlands.

### **Case Study – Staffin Housing Development**

Community groups have been at the forefront of delivering small housing scale developments in rural areas, such as Staffin, Fort Augustus, Arisaig and Raasay. The delivery of such projects enables specific needs to be met including the needs of the tourism industry where it has been identified as a critical unmet need for that community.



The Staffin Community Trust delivered a range of affordable homes, designed for families and young people priced out of the island's property market. The project also improved access to services with a new NHS health centre, and opportunities for local businesses with commercial units and workshops. All this was achieved on a small site with partnership working across public agencies, including the Council, and community groups. These types of projects are vital for helping to reverse population decline, sustaining local facilities such as primary schools, and supporting the local economy.

## **Supporting community wealth building**

Community wealth building provides an alternative approach to economic development and a practical response that aims to keep wealth within a local area. It is often described as a people centred approach to economic development and aims to ensure every area and community can participate in and benefit from economic activity. The Council has recently adopted its first Community Wealth Building Strategy which aims to retain greater wealth and maximise spending within and for the communities of the Highlands.

Delivering the Community Wealth Building Strategy will help communities and Highland businesses to take advantage of the growth of the tourism industry, capturing the economic and social benefits, wellbeing, reducing inequalities, and delivering improved outcomes for people in Highland.

The Council will focus on:

- Supporting community and local ownership in the tourism sector
- Developing a joint talent attraction and marketing programme for Highland through a dedicated tourism workstream within Workforce for the Future
- Working with partners to improve local transport and housing solutions as an enabler for people to access employment in the sector
- Working with local partnerships – community, third, public and private sectors - to deliver local tourism priorities and aspirations through place planning

## **Place-based planning**

The Council and communities have led on the preparation of a number of place-based plans that bring partners and communities together around a common strategy, vision and actions for an area. They aim to create a proposition for a place by aligning priorities, resources and funding to ensure better outcomes for people and places. Many have a direct connection to the tourism sector, setting out the specific projects and ambitions to allow the industry to deliver its full potential. These plans can provide the blueprint for how public and private sectors should come together with communities to leverage funding and co-invest.

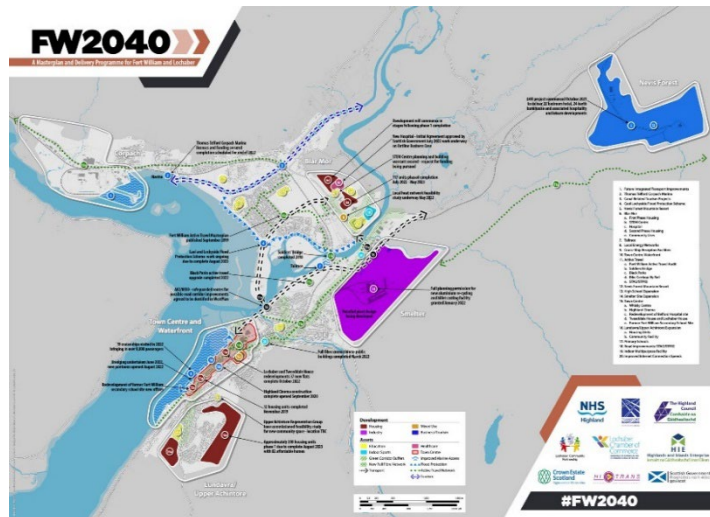
The Council will focus on:

- Working with communities on the preparation of place planning throughout the Highlands and ensuring that tourism is a central ingredient.
- Supporting communities to make informed decisions by sharing available tourism data where possible and sign posting to external information sources

- Supporting community-led tourism initiatives that promote sustainable practices and enhance the resilience of local ecosystems.

### Case Study – FW2040 & Fort William Town Centre Masterplan

The Council is working in partnership with Highlands and Islands Enterprise and Lochaber Chamber of Commerce to prepare a masterplan for the regeneration of Fort William town centre. It will build on the success of the Fort William 2040 work by providing a range of actions and proposals to create a vibrant and sustainable town centre, evoking a real sense of place as well as providing a positive experience for the thousands of visitors who enjoy what Lochaber has to offer. The [Fort William 2040](#) (FW2040) Programme Board will be responsible for overseeing the implementation of the masterplan.



## D. Celebrating our culture and heritage

**Our rich and distinctive culture and heritage is famous across the world and a powerful driver of the tourism industry. Celebrating and nurturing this not only gives us a clearer sense of identity but is essential to our lives and wellbeing. The Council, together with its arm’s-length organisation High Life Highland (HLH), plays an important role in developing and promoting Highland culture, heritage, arts, leisure, outdoor activities and attractions throughout the area. They often provide the foundation for many cultural attractions, contribute to the visitor experience and provide the motivation to visit or revisit. To help celebrate our culture and heritage the Council will concentrate on the following activities:**

### Events and entertainment industry

Events and entertainment are at the heart of what make the Highlands a great place to live, work and visit. We have an excellent track record of hosting events from



music events to sporting events, community street fairs and Highland Games - the Highlands hosts a diverse and inclusive range of events. Together these have raised the profile of the Highlands, boosted our economy, helped define our sense of identity, showcase the region as a vibrant, contemporary place and encourage people to live, work and visit here.

The refreshed national strategy [Scotland the Perfect Stage 2024-2035](#) provides a clear and ambitious framework for building on our status as a world-leading events destination. It recognises that the events and entertainment industry has faced increasing challenges, including from rising costs of doing business which have hit in the Highlands more than most places. It focuses on addressing national priority outcomes around Economy, Community, Environment, Workforce and Reputation & Profile.

While the majority of events are led by communities and the private sector, the Council and HLH have had both an important supporting and, in some cases, delivering role. Three of Highland's most important outdoor and leisure spaces, Inverness Castle, the Northern Meeting Park and Bught Park. All three Council assets are currently undergoing multi-million-pound improvement programmes, with each improving the ability to host events.

Going forward, we will focus on:

- Building on the industry's many achievements to date and explore new ways to support a strong and dynamic events and entertainment industry across Highland – particularly those events which help to attract visitors and delivers positive economic, social, and cultural impacts across the region and minimise their environmental impact
- Aligning with the [National Events Strategy 2024-2035](#) and concentrating on addressing the priority outcomes
- Contributing to the development of EventScotland's proposed Action Plan and delivering agreed actions assigned to us
- Continuing to work with EventScotland, organisers and other stakeholders to best utilise the resources available to attract and support event delivery across the region
- Exploring initiatives such as a green events framework for all Council-supported events, focusing on waste reduction, sustainable sourcing, and low-emission transport options
- Support event organisers in reducing their environmental footprint and achieving sustainability goals by promoting the use of sustainable transport, waste minimisation, and encouraging the use of local, sustainable products and services

## Case Study – UCI MTB World Cup

UCI Downhill Mountain Bike World Cup at Fort William started in 2002 and quickly became one of the most famous venues in the world, even being referred to as ‘Wimbledon of downhill mountain biking’.

Throughout the years the Council, along with other partners, has helped support

and fund the event. It has brought in tens of £Ms to the local economy and contributed to the strong mountain biking culture and attraction of the region. The Council will continue to build on this track record by welcoming future events to the area.



## Highland assets and visitor attractions and experiences

The Council’s assets enable the Council and Highland Life Highland (HLH) to operate a diverse range of sites and visitor attractions across Highland. These range from those more directly used by visitors such as museums and cultural & natural heritage sites, to archive centres, harbours and moorings, leisure centres, sporting facilities, parks, libraries and cemeteries.

Many are well established and are valued by visitors and local communities alike and play an important role in the local visitor economy. For example, the Highland Folk Museum in Newtonmore, Inverness Museum & Art Gallery, the Ben Nevis Centre in Fort William, the Storr Centre in the Isle of Skye, and the recently re-launched North Coast Visitor Centre in Thurso promote local cultural and natural heritage and welcome hundreds of thousands of visitors each year.

The award-winning archive centres in Inverness, Portree, Fort William and Wick also welcome ancestral tourists from all over the world, keen to explore their family history. Initiatives like [Am Baile](#), the bilingual history and culture website, and the [historical environment records](#) help to enrich the experience.

As with all businesses, however, we struggle at times with securing a suitable workforce and rising operating costs. It’s clear that additional investment in certain Highland assets can deliver a series of mutual benefits for visitors, communities, the environment, and the local economy. The Storr project shown below is a great example of this. We want to continue to explore ways of co-investing and finding opportunities for sustaining and developing our assets.

We will focus on:

- Working with partners to use Inverness Castle Experience and other similar major developments as catalysts for regeneration of our communities and to maximise opportunities to connect with, promote and support other cultural, natural and historic assets across the Highlands
- Maintaining and developing our portfolio of assets and facilities so there are high quality visitor attractions
- Working with communities and other stakeholders to identify and take forward new and innovative ways of utilising our assets in order to deliver positive impacts for communities, the environment, industry and visitors
- Working with partners to identify a pipeline of potential future major tourism investment projects in Highland to take advantage of any new funding which could become available

### **Case Study – Ionad an Stòir (The Storr Centre)**

The recent investment by the Council at the Old Man of Storr on Skye shows how sustainable tourism can deliver positive impacts for communities, businesses, visitors, and the environment.



The impressive geological feature in the north of Skye has become a must-see destination for people visiting Scotland, with nearly 300,000 visitors in 2024. However, this rapid growth in visitors put huge pressures on the site and surrounding area.



The Council agreed to co-invest with the community and develop enhanced public infrastructure and services - including an upgraded path network, public toilets, 150-space car park, motorhome waste facilities and dedicated Rangers services. A new visitor centre has also given a platform to promote local culture and Gaelic language, and the shop provides a valuable outlet for local suppliers. Together, this is improving the visitor experience, capacity pressures, the local economy, and is generating an income for reinvestment. The Traveller's Choice Award (Winner 2024) from TripAdvisor now ranks The Old Man of Storr in the top 10% of places to visit worldwide and this co-

investment initiative received the Convener's Award at the Council's 2024 staff awards.

Over £2 million has been invested to date, with funding drawn from the Scottish Government's Islands Infrastructure Fund, Coastal Communities Fund, and the Community Regeneration Fund, together with the council's Skye and Raasay Ward budget. The Council is exploring ways in which to expand this model of co-investment and funds have been allocated within the latest budget to deliver similar projects elsewhere.

### **Creative industries & Screen Tourism**

With our rich culture and heritage, the Highlands is a hotbed of creativity. The region is known for its high quality and distinctive art, crafts, textiles, music and performing arts and these are often a bedrock of our culture and visitor experience.

While partners such as Creative Scotland at a national level and Highland and Islands Enterprise at a regional level are more visible in this sector, the Council and HLH have an important nurturing role through the likes of music tuition and promoting the work of young and emerging artists and makers. The Council also delivers services such as '[Screen Highland](#)' which drives the development and reputation of the film and TV industry in Highland by promoting our filming locations, world-class talent, local crews and facilities to productions along with providing advice and support.

We will focus on:

- Advocacy and championing of the sector to ensure the value of culture and creative industries is understood and maximised
- Working with partners to deliver the national [Culture Strategy](#) and associated [Action Plan](#)
- Making use of existing partnerships to support and deliver initiatives which nurture the cultural and creative industries and showcase what our region can offer
- Using the new 'Screen Highland' brand and website as a launch pad to modernise the approach and explore ways to further embed the positive impacts of the industry within our local communities

## Case Study – Screen Highland

Established over 20 years ago, Screen Highland is the local film office managed by the Highland Council representing over a thousand locations and over 500 crew and support services making Highland one of the finest and popular filming locations in the world. Having recently invested in the service by going through a rebrand, the Council will use this opportunity to explore new ways to expand its offering to make the area even more film friendly for productions considering Highland as a place to film.



The screen industry is one of Scotland’s largest growth sectors with an increase of 55% from 2019 to 2021 and Highland has seen the benefit from that with record spend from productions of over £3million in direct spend to Highland in both 2022 and 2023 with the trend set to continue.

## Gaelic

Gaelic is woven into the cultural heritage of the Highland area, and it provides a vital role in contributing to visitors’ memorable experiences. It's a key ingredient in our cultural and heritage, linguistic and sense of place offer, complementing visitor interests through events, food and drink, nature-based, and ancestral tourism. There is an increasing interest in Gaelic language and culture from both UK and international visitors and this creates new opportunities for the sector to integrate Gaelic into the visitor offering.

The Council’s [Gaelic Language Plan 2024-2029](#) builds on the Council’s long-standing commitment to give equal respect for Gaelic and English and sets out aims and ambitions for Gaelic language and culture over the next five years. It focuses on four key themes: 1) Communities and Home; 2) Media, Arts, Culture and Heritage; 3) Business and the Economy; 4) Education. [VisitScotland’s Gaelic Tourism Plan 2024-2029](#) also aims to support industry and communities to create experiences that celebrate Gaelic culture, heritage, and language.

We will focus on:

- Delivering on the priorities and actions set out in the Gaelic Language Plan 2024-2029
- Utilising and promoting the Gaelic Tourism Strategy for Scotland 2024-2029

- Continuing to work in partnership with Gaelic agencies such as [Fèis Rois](#), [Eden Court Theatre](#), [Fèisean nan Gàidheal](#), [An Comunn Gàidhealach](#), [Comunn na Gàidhlig](#) and [Hands up for Trad](#) to support the delivery of music, drama, media, cultural and sporting activities across Highland such as Blas Festival, the Royal National Mòd or Na Trads (Scots Trad Music Awards)
- Supporting the development and delivery of Gaelic and cultural inclusion in projects, including the Inverness Castle project
- Focusing on the continued delivery of a bilingual signage policy for Highland
- Partner working with relevant public agencies to realise the economic benefits of Gaelic and promote Gaelic as a mechanism for attracting tourism and enhancing the visitor experience

### Cast Study – Royal National Mòd

The [Royal National Mòd](#) is Scotland’s leading Gaelic cultural event which celebrates traditional music, song, drama, literature, art and sport. It attracts Gaelic communities from across the world and has a legacy which lasts far beyond its eight-day programme of competitions and events. Highland last hosted the event in 2021, when more than 3,500 people gathered in Inverness to compete in competitions and take in the array of events on offer, generating over [£1.2m economic benefit the Highlands](#).

The Highland Council is committed to the development of the Gaelic language and has hosted The Mòd for many years. We work closely with organisers An Comunn Gàidhealach to return the Royal National Mòd to Highland on a regular basis.



## **E. Business growth and skilled workforce**

**Having a tourism industry which is well supported and able to sustainably grow, adapt, innovate, and prosper is essential for the long-term health of tourism in Highland. A skilled workforce is the core focus of the business offer and tourist experience encountered yet tourism, like many other sectors, currently has challenges when seeking to secure staff for the variety of skilled positions available. With an ageing population, a projected reducing workforce, and an increase in the number of jobs across the Highland economy, this situation is expected to worsen. It is imperative for the industry that public agencies including partners such as Highland and Islands Enterprise, Skills Development Scotland, the University of the Highlands and Islands and the private sector work to address these issues and drive the industry forward with a range of business support packages and other initiatives.**

### **Enabling a skilled workforce**

The labour challenge faced is multi-faceted and the actions of many are required if the tourism sector is to have the skilled labour force it requires. The Council can contribute but a collaborative effort is required across the wider tourism sector, with individual employers and with skills and economic development partner organisations. The Council through its Delivery Plan 2024-2027: Workforce for the Future portfolio has identified tourism as one of its seven targeted priority sectors. In doing so, this portfolio of work, seeks to:

- Engage with the tourism sector to create jobs and pathways towards sustainable employment - being led by the demands tourism businesses have for workers
- Align school curriculum offers towards the economic opportunities available to young people
- Strengthen our partnership approaches to provide support and opportunities for those furthest from economic achievement and success in the labour market

The Council will focus on:

- Continuing skills investment and fair work for existing workforce using the opportunities available to the Council such as Business Gateway.
- Continuing industry engagement, including the establishment of a Partner Skills Board for Highland where tourism features as a priority sector

- Delivering clear skills pathways to enable staff to enter and progress in the sector as set out in the Council's Delivery Programme
- Delivering Initiatives to promote and encourage new recruits to the sector

### **Supporting business growth**

A wide variety of support exists for businesses. Our key partners, such as Visit Scotland, Highlands and Islands Enterprise and Skills Development Scotland, offer a range of services and programmes dedicated to the tourism market. The Highland Council also operates several important services which are aimed at helping new and existing businesses sustainably grow, innovate and prosper. These include our Business Gateway support services and Highland Opportunity Investment Ltd (HOIL) which offers accessible business finance and advice.

The Council also operates [InvestHighland](#) which acts as an online 'shop window' for inward investment opportunities in Highland, including sustainable tourism and creative industries, and a platform for talent attraction. It is clearly important to continue to coordinate across these organisations to ensure efficiency and guarantee businesses can access the support they need to thrive.

### **The Council will focus on:**

- Supporting business development activities which give businesses access to the resources they need to sustainably grow, innovate and prosper over the short, medium and longer term
- Working with tourism businesses to develop co-investment and deliver bespoke advisory and financial support, such as recruitment and skills investment of staff, advice to aid tourism businesses on their journey to net zero and acquiring new digital skills and processes
- Proactively explore opportunities to create strategic partnerships and Joint Ventures with the private and third sectors
- Improving synergies between Council services, such as Business Gateway, Employability and HOIL, and our partner agencies
- Working to promote different models of community ownership including social enterprise, co-operatives and community-owned enterprises
- Implementing the Employer Charter which will support fair work and the living wage
- Refining the promotional pitch for the region through 'Invest Highland'



- Championing national business growth strategies, such as the [Agritourism Strategy](#) which promotes the sector and a 'responsible' approach to service delivery and tourism developments

### **Case Study – Caithness Reindeer Centre**

Lichen Caithness is home to the UK's most northerly reindeer. The furry residents are the stars of the centre's daily reindeer experiences, which give visitors the chance to learn about the reindeer habitat, food sources, and climate-specific adaptations.



The business accessed a suite of Business Gateway's start-up support, including one-to-one guidance from a dedicated business adviser, as well as advice on their business plan, marketing, and funding. Business Gateway Highland also assisted Lichen Caithness with the Highland Council's Business Growth Grant and the Caithness Business Fund, which gave them a solid foundation to get the business off the ground. They also received digital support, which helped develop a strong social media strategy.

Since opening in August, Lichen Caithness has welcomed a large number of visitors, including both locals and tourists. The team has forged links with a popular hotelier on the NC500 route, which has contributed to their visitor numbers increasing steadily as word continues to spread about the centre.

## 6. Delivering the Strategy

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This Tourism Strategy demonstrates how the Council will organise itself and invest its resources in the visitor economy. Our Ambition provides the strategic direction, and the Focus Areas outline the activities which the Council will concentrate on up to 2030. This section sets out the factors which need to come together to successfully deliver this strategy.

### **Prioritising Council budget**

Many years of real terms cuts to local authority funding means it is a constant challenge to keep pace with rising costs and increasing demand. With the current resources available to it, the Council is not able to support the tourism sector as much as it would wish. The Council therefore needs to prioritise and maximise the available resource and direct it to those services most in need. To maximise the resource available, there will be an emphasis on strategic investment decisions and co-investment.

In 2024, the Council approved an Investment Plan aimed at delivering £2 billion over 20 years on core Council assets and infrastructure, including schools and roads. This long-term planning will be essential to ensure a sustainable approach to investment, contractor procurement, and opportunities to attract match funding and co-investment. This is complemented by the [Delivery Plan 2024-2027](#) which contains a number of workstreams, including tourism related activity that the Council will concentrate on to deliver on the commitments set out in the Council's Programme.

### **Visitor Levy**

The Visitor Levy (Scotland) Act 2024 has provided the powers for local authorities to now choose whether to place a levy on visitors staying overnight in paid accommodation. It is a familiar mechanism across the world to generate the necessary funds to reinvest in the sector.

With the growth of our tourism sector in Highland, the Council has long seen a visitor levy to have real potential to generate change in the ways we manage visitors and support the industry to deliver positive change for everyone.

It is the Council's intention to undertake a formal consultation about the introduction of a Visitor Levy. Following any such consultation and an 18-month implementation period, the earliest a visitor levy can be introduced in Highland is by autumn 2026. If the Council agrees to implement a Visitor Levy for Highland and in advance of a levy coming into force, the Council will develop an associated investment plan during the 18-month implementation period. Decision making will be steered by specific visitor

levy objectives, and these will be closely aligned with the Ambition and Focus Areas outlined in this strategy. The investment plan will be prepared with input from the Visitor Levy Forum, which will be made up of representatives from Highland residents, industry and partners.

The Council also remains committed to investigating and pursuing options to secure similar income from those visitors who fall out with the Visitor Levy legislation. This includes the 300,000 cruise ship passengers and a significant number of motorhomes visiting the region each year. We will continue to work with Government and other stakeholders to seek powers that will enable local authorities to secure income from cruise ship and motorhome visitors.

### **Partnership working and co-investment**

As the saying goes, "tourism is everyone's business" and the Council recognises the need and value of working together with communities and businesses to deliver solutions. With £100s millions of investment in the sector across private and public sectors and via community-led schemes, there is opportunity to develop new and diverse investment models for delivering a variety of infrastructure projects. This includes considering strategic partnerships and joint ventures with other public sector agencies, as well as the private and third sectors. By collaborating with these potential partners, the Council aims to maximise available development opportunities, leveraging expertise and resources to propel shared ambitious growth objectives.

The Highland Tourism Partnership is one of the Council's main platforms for building strong, collaborative relationships with industry representatives and partner agencies. Currently, the Partnership is developing its own tourism plan which seeks to unite efforts and maximise resources, fostering impactful changes that align with the partnerships shared vision and goals. The Council sees real value in producing a new partnership plan, which complements this strategy. The Council will continue to support and feed into this process and related future workloads.

The progression of place plans which exist and cover many parts of Highland provide a strong basis for partnership working and identify the priority projects which communities want to see delivered. The Council will continue to support the preparation of these and are committed to helping delivery of them.

Given the contribution the Highlands makes to Scottish and UK visitor economy, there is a clear case for national funding to support the region. Recent Government funding, such as via the City Region Deal and RTIF, have been vital in addressing long standing problems, unlocking the region's potential and delivering transformational changes. The successful delivery of this tourism strategy requires further such

investment to enable Highland to continue to be a lead driver of the national tourism industry.

### **Monitoring and evaluation**

Monitoring the performance of the tourism sector and the extent to which it impacts and contributes to our communities and environment will be essential for making informed decisions. As part of preparing the associated delivery programme, where specific actions and projects will be identified in greater detail, we will set out appropriate and achievable measures against the Ambition and Focus Areas set out in this strategy. Potential measures for inclusion are:

- Resident satisfaction levels
- Impacts on the environment and tracking net zero targets
- Visitor numbers, spend and satisfaction levels
- Condition and provision of infrastructure and services
- Quantity and quality of tourism related jobs and businesses supported
- Delivery performance of other related plans and proposals

Given the scale of Highland and varying levels of pressures and different priorities, we will need to collect and analyse certain data at a sub-Highland level.

Key to this, will be establishing baseline and suitable measures of success against which the actions and projects set out can be considered. Some baseline data for indicators is available, while other indicators will require further research. Need to undertake, utilise, share and support collection of data amongst partners and businesses to help understand challenges and opportunities better and take informed decisions.

### **Tourism delivery programme**

This strategy represents only one step in the process. Next, the Council will develop a delivery programme to set out in more detail the areas of focus identified above and set related actions and specific projects.

Despite current national funding challenges, the Highland Council Tourism Infrastructure Plan prepared in 2022 still has an important role to play in setting out potential project priorities for when funding does become available. The collaborative approach taken provides a basis for this work, and many projects identified across the region are still relevant and yet to be delivered.

The delivery programme will also align and complement the outcomes and priority projects identified in the area place plans. Many communities and partners will be essential to the delivery of these plans and projects. In preparation and monitoring of the Delivery Plan we will seek to utilise existing and new communication networks.

This work will be influenced by the resources available to the Council and those that others are able to contribute. This delivery programme will be produced after the Council has consulted on and made a decision on the proposed Visitor Levy Scheme.

The delivery programme will set out how it is proposed to monitor and measure success with the delivery of the Strategy. It is anticipated that this will be aligned with monitoring of the Visitor Levy Scheme.