

Valuing nature based tourism in Scotland

Tourism is one of Scotland's largest business sectors, providing employment for 200,000 people and generating visitor spending of more than £4 billion a year.

The natural environment is a key tourism asset with nature-based tourism making a significant contribution to the sector. Based on information in existing studies the main findings from a study by Scottish Natural Heritage are:

- The value to Scotland's economy (the direct economic impact) of nature based tourism is **£1.4 billion** per year
- 39,000 jobs (full-time equivalent) are reliant on Scotland's nature based tourism
- Tourist spending on nature based activities is worth nearly **40% of all tourism spending** in Scotland.

Nature based tourism

Nature based tourism is defined as an overnight stay that is related wholly or partly to Scotland's natural heritage – its wildlife, habitats, landscapes and natural beauty.

The main activities that make up the nature based tourism market are wildlife watching, enjoying the landscape, walking, adventure activities and field sports.

Wildlife

Wildlife tourism in Scotland is a valuable niche sector within the tourism industry. It includes activities such as bird watching, whale watching and guided walks. The wildlife section in this study also includes activities such as practical conservation holidays and other specialist interests such as geology and botany field trips.

This study uses a wider definition of the wildlife sector than a Scottish Government study on the Economic Impacts of Wildlife Tourism in Scotland (2010). It includes all those who enjoy wildlife as only part of their holiday. This gives a more comprehensive estimate of the wildlife sector as a whole.

The value to the economy of **wildlife tourism** is **£127 million** per year.

Field Sports

Field sports cover a range of activities including shooting, hunting and fishing. This section covers grouse (and other game) shooting, deer stalking, and all types of angling.

The value to the economy of **field sports tourism** is **£136 million** per year.



Sea Eagles on Mull bring in around **£2 million** a year to the local economy with thousands of people visiting the island to see them.

Viewing wildlife is the main driver behind over one million trips to Scotland every year.

Over **32,000** visitors come every year to the Scottish Game Fair in Perthshire

Every year around **400,000** people visit Glen Nevis and around **110,000** people walk to the summit of Ben Nevis

Up to **30,000** people complete the whole route of the West Highland Way, each year with **60,000** other people walking a part of it.

There are around **3,000** Scottish surfers – mainly based in the central belt. Surfing is growing by about **20%** each year.

Dolphin watching on the east coast of Scotland generates **£4 million** for the local economy each year.

The Visitor Experience survey (2008) found that scenery is the top reason for choosing Scotland as a holiday destination for both UK and international visitors.

Examples taken from a variety of other research findings

Walking

Walking is clearly the most popular nature based activity for UK residents holidaying in Scotland and in 2009 VisitScotland identified 47% of total UK visitor trips (5.7 million trips) involved some form of walking activity.

Walking for this study includes walks of more than one mile, rambling, hiking and mountain sports including hill walking, mountaineering and climbing.

The value to the economy of **walking tourism** is **£533 million** per year.

Adventure activities

Adventure tourism is an expanding market with over 350,000 holiday trips to Scotland made by visitors undertaking adventure activities, including mountain biking, every year. It combines elements of physical activity, interaction with nature and cultural exploration and discovery. The active element includes canoeing and kayaking, surfing, sub aqua, sailing, mountain biking, cycling, extreme snow sports, horse riding and adventure activities such as rafting or paragliding. All rely on a diverse, high quality natural environment.

The value to the economy of **adventure activity tourism** is **£178 million** per year.

Landscapes and scenery

Landscapes and scenery play a major part in attracting visitors to Scotland. A high proportion of both UK and international visitors tour Scotland and go sightseeing to view the scenery. More visitors enjoy the landscape than take part in any individual activity using the natural environment.

The value to the economy of tourists **touring and enjoying Scotland's landscapes** and scenery is **£420 million** per year.

Future prosperity

Nature based tourism plays a vital part in Scotland's rural economy, pulling in millions of pounds and creating many hundreds of job opportunities. As one of Europe's leading year-round nature destinations with a world famous reputation for natural heritage, Scotland has a great deal to offer.

With spending on nature based activities worth nearly 40% of all tourism spending, nature based tourism can generate significant benefits for the economy. We need to ensure that developments and activities are sustainable so that more people can enjoy Scotland's nature.

This document summarises research carried out for Scottish Natural Heritage. The full research report *Assessing the economic impacts of nature based tourism in Scotland* can be found at www.snh.gov.uk

Methodology

Attributing value to nature based tourism is complex. In many instances, data is not available and where it does exist, distinct studies often cannot be compared because of significant differences in approaches. The approach taken in this study was to identify and examine individually the main natural heritage features and activities that contribute to Scotland's tourism product. The research is based on existing studies and uses raw material from some of the studies to calculate economic impact assessments for each of the individual activities. The study then puts together the individual assessments, in a way that avoids double counting, to reach an overall figure. The overall figure does not include all activity from every sector. It attributes a percentage of expenditure based on the importance of nature for each of the sectors or activities. Where data is not available, the research sometimes has to rely on assumptions and estimates so figures should be regarded as indicative. Ascribing a specific motivation for any individual trip is difficult and therefore there is less confidence in the accuracy of individual activity figures.

The research does not include values for any business trips or visits to Edinburgh and Glasgow and so may underestimate the importance of some nature-based activities.



Scottish Natural Heritage

All of nature for all of Scotland

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