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Appendix 13.1

Socioeconomic Detailed Baseline Conditions

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A13.1 INTRODUCTION

A13.1.1 This appendix has been prepared on behalf of Fred Olsen Renewables Ltd (FORL) by Stantec UK Ltd. It supports the assessment of likely significant socio-economic, tourism and recreation effects from the Scawd Law Wind Farm ('the Proposed Development') on land within the Holylee Estate, approximately 4 km north of the Walkerburn.

A13.1.2 This purpose of this appendix is to characterise socio-economic, tourism, and recreation baseline conditions to identify the sensitivity of relevant receptors likely to be impacted by the Proposed Development during its construction and operational phases.

- The appendix is structured as follows:
- Methodology;
- Key receptors;
- Scoping Responses;
- Baseline Conditions; and
- Receptor Sensitivity.

A13.2 METHODOLOGY

A13.2.1 To inform this assessment, a desk-based review of baseline conditions was undertaken to establish relevant baseline socio-economic conditions at the Proposed Developement and across the identified Study Areas, as well as to consider how these conditions compare with the regional average. The assessment has adopted three study areas, each focused upon the geographical area where different types of socio-economic, tourism and recreation effects are likely to occur which have the potential to be considered significant in the context of the EIA Regulations:

- **Labour Market Study Area**: To enable a proportionate and robust assessment the labour market will be assessed about both the Galashiels and Peebles Travel to Work Area (TTWA) Study area and SBC Study Area. A TTWA is a statistical tool used by UK Government agencies and local authorities, to indicate an area where the population would generally commute to a larger town, city or conurbation for the purposes of employment. The TTWA Study Area will allow for an analysis of the mobility of labour across administrative boundaries, whilst the SBC Study Area will effectively capture the regional scale of effect a major infrastructure project as the Proposed Development can have.
- **Tourism and Visitor Economy Study Area:** To enable consistency with the significant visual effects concluded within **Chapter 6 – Landscape and Visual**, tourism effects will be assessed within a 12 km radius of the Proposed Development capturing key tourist recreational routes and tourism assets. Recreation and public access effects will be assessed within the context of "*Designated Walking and Other Recreational Routes*" receptor grouping. This Study Area will consider the 'primary' visual and setting effects from the Proposed Development with the potential to generate 'secondary' tourism and recreation effects. This assessment will capture likely significant effects as reported within **Chapter 12 – Transport and Access, Chapter 10 - Heritage** and **Chapter 6 – Landscape and Visual Impact Assessment.**

A13.3 KEY RECEPTORS

Labour Market

A13.3.1 For employment effects, the availability of labour and skills is critical in accommodating the demands, needs and requirements of the Proposed Development. This appendix therefore reviews the following to define the sensitivity of the labour market:

- The absolute size of the labour market of the Local and Wider Socio-economic Study Areas and levels of participation within these;
- The availability of skilled and unskilled labour in the Local and Wider Socio-economic Study Areas relative to national averages;
- The proportion of employment in relevant sectors (e.g. construction workers) within the Local and Wider Socio-economic Study Areas; and,
- Average levels of remuneration associated with participation in the labour market of the Wider Socioeconomic Study Area.

Key Business Sectors

A13.3.2 The following key business sectors are relevant to the proposed development and have therefore been considered as receptors in the assessment of likely socio-economic effects. The sensitivity of these sectoral receptors has been determined with reference to their importance to each Socio-economic Study Area and susceptibility to potential changes as a result of the proposed development. Receptor sensitivity (Negligible to High) of relevant receptors was therefore defined on a case by case basis using the baseline information presented below.

Tourism and Recreation

A13.3.3 This appendix identifies key components of the tourism and recreation business sector with the potential to be affected by the Proposed Development, as well as considering impacts on the sector as a whole. Notwithstanding the unique characteristics and offering of all individual tourism and recreational assets across the Tourism and Recreation Study Area, receptors of relevance to this assessment can be categorised under seven broad groupings, each with different sensitivity to changes in visitor attractiveness:

- Designated walking and recreational routes;
- Indoor tourist destinations;
- Outdoor tourist destinations;
- Hospitality;
- Visitor Accommodation;
- Recreational activities in the open countryside; and,
- Tourists travelling (by road) through the open countryside.

A13.3.4 Of these, indoor tourist destinations are not likely to experience a significant effect on their visitor attractiveness or tourism potential and thus can be scoped out from further consideration. This is owing to the main features of such destination being experienced indoors, often on a localised or special interest basis, and therefore being unrelated to the surrounding landscape.

A13.3.5 The baseline information below identifies relevant tourism assets within the assessed Tourism & Recreation Study Area and characterises both the importance and susceptibility of each sectoral component to potential changes in terms of visitor attractiveness, numbers and expenditure. This underpins the sensitivity ratings assigned to each key component of the tourism and recreation sector in **Section A13.6 – Receptor Sensitivity**. This sectoral approach to defining receptor sensitivity differs from individual user-based landscape, visual, cultural heritage and access sensitivities assigned to individual tourism and recreation related receptors, as identified separately in relevant technical assessment chapters of the EIA Report.

A13.4 SCOPING RESPONSES

Table A13.4.1: Below sets out the Scoping consultation responses relevant to Chapter 13: Socioeconomics, Tourism and Recreation.

Consultee	Source	Issue Raised	Response/Action Taken
Scottish Borders Coun	Formal Scoping Response	Noted likely greatest impacts to be A72, B709, the Southern Upland Way and other hill summit and minor road receptors to the south of the Tweed Valley. Previous change to design (reduced to 15 turbines) not likely to be supported by SBC.	Noted. **Chapter 12: Traffic and Transport** provides an assessment of likely significant effects on transport networks. Building on this, **Chapter 13: Socioeconomics, Tourism and Recreation** provides an assessment of likely tourism and recreational effects, considering: • Likely direct construction phase primary' effects on access to and the amenity of recreational non-vehicular routes for individual users. • Likely indirect effects on the visitor attractiveness and tourism potential of designated walking and recreational routes as one of six relevant components of the tourism and recreation sector. This secondary effect results from 'primary' effects including changes in visual amenity and physical access.
	Formal Scoping Response	Other receptors include: Settlements or individual properties 2-3 km should feature in an RVAA.	Noted. The RVAA has been conducted as referenced in **Chapter 6: Landscape and Visual.** This includes shadow flicker
	Formal Scoping Response	Residential properties within 2 km of each turbine should be assessed for shadow flicker.	Noted. The RVAA has been conducted as referenced in **Chapter 6: Landscape and Visual.** This includes shadow flicker.
	Formal Scoping Response	Request for positive/negative economic effects of development, in addition to request for information on environmental/carbon offset impacts	As set out in the conclusions of **Chapter 13: Socioeconomics, Tourism and Recreation. Chapter 7: Ecology** sets out a suite of mitigation measures including proposals for a Habitat Management Plan.
	Formal Scoping Response	Request for assurance that the Proposed Development would not have unacceptable effects established local rural (particularly tourist) businesses and tourism generally, noting importance of Tweed Valley.	As set out in the assessments and conclusions within **Chapter 13: Socioeconomics, Tourism and Recreation**.
	Formal Scoping Response	Request for assessment to draw upon several established studies on socio-economic and tourism impacts in relation to wind farm developments.	See **Appendix 13.2 Policy Context.**
Parish of Stow Community Council	Formal Scoping Response	Notes potential visibility of Proposed Development from Stow & Raeshaw Effect of Proposed Development on tourism assets and recreational routes in Stow. Notes future proposed tourist assets/routes. Visual and noise effects should be considered, including cycle route from Stow to Clovenfords.	Impacts on noise and visual amenity are provided in **Chapter 6: Landscape Visual**. As set out via relevant receptors within the assessments and conclusions within **Chapter 13: Socioeconomics, Tourism and Recreation.**
Historic Environment Scotland	Formal Scoping Response	Provides a list of nationally important historic environment assets, noting the potential for significant adverse impacts on their setting.	**Chapter 10: Cultural Heritage** provides an assessment of likely significant effects on heritage assets including scheduled monuments. Building on this, the assessment of likely tourism and recreational effects provided in this

Consultee	Source	Issue Raised	Response/Action Taken
			chapter considers the likely effect of such 'primary' effects on tourism interests and recreational activities where relevant.
Mountaineering Scotland	Formal Scoping Response	Noted instances of impacts on tourism-related employment around windfarms in local scenic designations in BiGGAR Economics report.	A review of available research on wind farms and tourism impacts is provided in **Chapter 13: Socioeconomics, Tourism and Recreation (Appendix 13.2 Policy Context).**
Nature Scot	Formal Scoping Response	Noted potential for landscape and visual impacts, including aviation lighting and cumulative impacts with other proposed, consented and operational wind farms in the wider area.	**Chapter 6: Ecology** sets out a range of proposed mitigation measures for the proposed development, taking account of potential impacts from construction, operation and decommissioning on qualifying interests of designations. Chapter 6: landscape and Visual assesses the potential for singular and cumulative landscape and visual impacts, including aviation lighting.
		Potential impacts on the qualifying interests of the River Tweed Special Area of Conservation (SAC) and Site of Special Scientific Interest (SSSI) and the Moorfoot Hills SAC/SSSI can be addressed by appropriate mitigation measures.	
		Potential effects of construction, operation and decommissioning of the proposed development in relation to the qualifying interests of the SAC, including proposed access tracks.	

A13.5 BASELINE CONDITIONS

The Proposed Development

A13.5.1 The Proposed Development is located within the Holylee Estate to the north-east of Innerleithen, approximately 3 km to the east of the B709 and 4 km north of the A72.

A13.5.2 The distribution of soils across the Proposed Development is dominated by brown soils however an area of dystrophic blanket peat is located to the north of the Proposed Development on Bareback Knowe and Windlestraw Law. The area to the west of Maiden Law and to the west of Bareback Knowe is highlighted as peaty gleyed podzols.

A13.5.3 The land is currently used for sheep farming and the release of birds for game shooting. An agreement has been established with the landowner for the development area associated with the Proposed Development and agreements have been made with a third-party landowner for the access route.

The Surrounding Area

A13.5.4 The following section presents the relevant baseline conditions for the SBC Study Area and TTWA Study Area where information is available. Scotland has been used as comparator where appropriate.

Settlement Profile

A13.5.5 The Scottish Borders adjoins the City of Edinburgh, Dumfries and Galloway, East Lothian, Midlothian, South Lanarkshire, West Lothian and, to the south-west, south and east, the English counties of Cumbria and Northumberland. The Scottish Borders is the sixth largest Local Authority in Scotland in terms of land mass or area. The SBC Local Development Plan (2016) and the Scottish Borders Proposed Local Development Plan (2020) details that over two thirds of the area is classed as accessible rural by the Scottish Government, with just under one third being remote rural.

A13.5.6 Galashiels, Peebles and Innerleithen are located in the Central Borders Strategic Development Area (SDA) as defined in the SESplan (2013)[1]. The Central SDA is considered to be the primary centre of population within the Borders and resultantly contains a significant part of the business base and acts as the main administrative centre for the wider administrative area. It is set within a Countryside around Town (CAT) designation that is aimed at preventing coalescence, improving the quality of the surrounding countryside and providing a recreational resource for the population as part of a wider green network.

A13.5.7 Peebles has a successful town centre which has an important role in the tourism market, which in turn, benefits from the mountain biking opportunities provided by 7Stanes Mountain Bike Trails at Glentress Forest.

A13.5.8 The Central SDA is supported by the Western SDA, as defined in the SESplan (2013)[2], in which Walkerburn is situated. The Western SDA plays a secondary role in the wider SBC spatial strategy, with recognition of the important roles of it hinterlands area.

A13.5.9 Both the Central and Western SDA benefit from good connectivity to the City of Edinburgh (c. 45-minute drive) via the A703/A701 and the A7 benefiting the local economy, recreation and the tourism and visitor sector.

A13.5.10 Chapter 6 – Landscape and Visual Impact Assessment identified the following residential properties within 3 km of the proposed development:

- Seathorpe (within red line boundary of the proposed development);
- Caberstongrans (within red line boundary of the proposed development);
- Glentress (2.5 km west of the proposed development);
- Colquhar (2.5 km west of the proposed development);
- The Common (2.6 km south east of the proposed development); and,
- Blackhopebyre (2.7 km north west of the proposed development).

[1] Scottish Government (2013) SESPlan https://www.sesplan.gov.uk/assets/files/docs/290813/SESplan%20Strategic%20Development%20Plan%20Approved%2027%20June%202013.pdf

[2] Scottish Government (2013) SESPlan https://www.sesplan.gov.uk/assets/files/docs/290813/SESplan%20Strategic%20Development%20Plan%20Approved%2027%20June%202013.pdf

Labour Market

Demographics

A13.5.11 The latest information indicates that in 2016 the TTWA Study Area has an estimated population of 57,774[3].

A13.5.12 Population estimates for the Scottish Boarders indicate a total population of 115,500, 58.8% of which was of working ages (16 – 64 years) (2019)[4]. This is below the comparator of Scotland of which 64.0% of the overall population in 2019 were of working age. The 5.2% gap between the areas corresponds with a higher proportion of the pensionable age (65+ years) population in the Scottish Borders – 24.8% compared to 19.1% across Scotland.

Economic Activity

A13.5.13 **Table A13.5.1** below presents key metrics of economic activity across the Labour Market Study Areas, including the economic activity rate which measures the percentage of the population (employment and unemployed) and employment rate number of people in employment expressed as a percentage of the working age (16 – 64 years) population.

Table A13.5.1: Below sets out the Scoping consultation responses relevant to Chapter 13: Socioeconomics, Tourism and Recreation.

	Economic Activity (16 – 64 years)	Employment Rate (16 – 64 years)	Median Full Time Gross Annual Pay[5]
TTWA Study Area[6]	80.4%	77.7%	*
SBC Study Area[7]	78.7%	76.2%	£26,861
Scotland[8]	77.5%	74.8%	£31,839

**this information is not available at the TTWA level.*

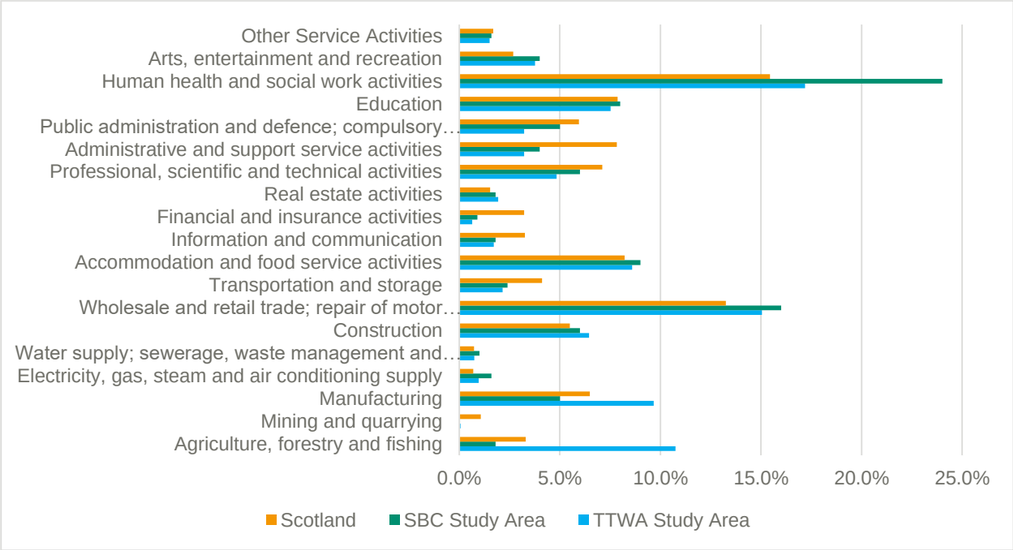
A13.5.14 Economic activity and employment across the Labour Market Study Areas are above that for Scotland. The TTWA Study Area in particular exhibits an economic activity (16- 64 years) 2.9% above that for Scotland. Median Full Time Gross Annual Pay is however 15.6% less within the SBC Study Area (£26,861) compared to Scotland (£31,839); and,

A13.5.15 Job density indicates the available of jobs per resident (16-64 years). Although there is less than one job per resident in the TTWA Study Area (0.87), this is above the national comparator for Scotland (0.82). The SBC Study Area exhibits the lowest job density (0.79) within the Labour Market Study Area[9].

Industrial Profile

A13.5.16 **Figure A**13.5.1 below charts employment by industry across the TTWA Study Area and SBC Study Area, against the Scotland comparator.

Figure A13.5.1 : Industry of Employment



Source: ONS (2019) Business Register and Employment Survey.

A13.5.17 The two leading industries of employment across the TTWA Study Area and SBC Study Area are 'human health and social work activities' 17.2% and 24% respectively, and 'wholesale and retail trade; repair of motor vehicles and motorcycles' 15.0% and 16.0% respectively.

A13.5.18 The SBC Proposed Local Development Plan (2020) details that the area continues to have a significant reliance upon traditional rural activities, focused upon agriculture, forestry and fishing. This is reflected in the latest available date with employment in agriculture, forestry and fishing industry accounting for 10.7% of employment within the TTWA Study Area.

A13.5.19 The SBC Proposed Local Development Plan (2020) raised that all of these industries in the area however have faced continuing challenges to their competitiveness with a consequential impact on the viability of the rural area as a whole.

A13.5.20 The Scottish Borders Council Proposed Local Development Plan (2020) highlights a continued reliance upon traditional rural activities such as agriculture forestry and fishing. Workforce composition in the Scottish Borders primarily focuses on health and social work, retail, construction, education, agriculture, manufacturing, tourism and public administration. There are around 54,000 economically active people in the Borders in 2018, approximately 41,900 of these are employees with the remaining 10,000 self-employed.[10]

A13.5.21 **Figure A13.5.2** below depicts the latest occupation profile data for the TTWA Study Area and the SBC Study Area alongside the compactor of Scotland.

[3] ONS (2016) Travel to Work Areas

[4] ONS (2019) Population estimates - local authority based by five year age band

[5] ONS (2020) Annual Survey of Hours and Earnings

[6] ONS (2019) Annual Population Survey

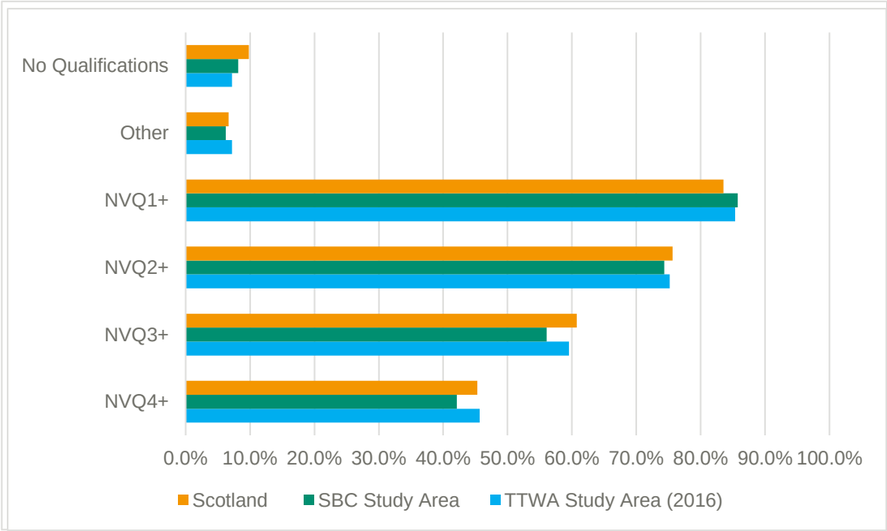
[7] ONS (2019) Annual Population Survey

[8] ONS (2019) Annual Population Survey

[9] ONS (2018) Job Density

[10] The Scottish Borders Council Proposed Local Development Plan (2020) Available at: https://www.scotborders.gov.uk/info/20051/plans_and_guidance/121/local_development_plan/2

Figure A13.5.2: Occupational Profile



Source: ONS (2019) Business Register and Employment Survey

A13.5.22 The occupational profile for the TTWA Study Area and SBC Study Area is heavily weighted towards 'professional occupations' (21.7% and 18.8% respectfully).

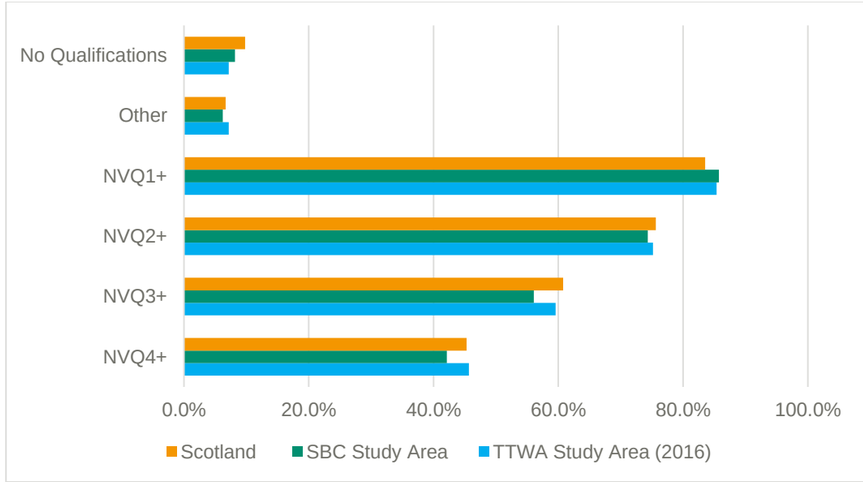
A13.5.23 Other leading occupations in the TTWA Study Area comprise of 'associate professional & technical occupations' accounting for 13.3% and 'administrative and secretarial occupations' accounting for 12.1%.

A13.5.24 Within the SBC Study Area, other leading occupations comprise of 13.0% within 'skilled trades occupations' and 12.1% within 'managers, directors and senior officials'.

Skills Profile

A13.5.25 **Figure A13.5.3** below presents the TTWA Study Area and SBC Study Area, alongside the Scotland comparator, working age population (16 – 64 years) by National Vocational Qualification (NVQ) achievement levels.

Figure A13.5.3: Skill Profile



Source: ONS (2019) Business Register and Employment Survey.

A13.5.26 The TTWA Study Area and SBC Study Area have a high proportion of residents with NVQ1+ (85.4% and 85.8% respectively) above the national average for Scotland (83.5%). They also exhibit high proportions of those with NVQ2+ (75.2% and 59.6%) and NVQ3+ (74.3% and 56.1%).

A13.5.27 It is however notable that both Study Areas (TTWA Study Area 7.4% and SBC Study Area 8.2%) exhibit proportions for No Qualifications below that for Scotland (9.8%), representative of a higher qualified population compared to the national average.

Key Business Sectors

Construction Sector

A13.5.28 The construction sector in the TTWA Study Area supports some 1,500 jobs[11] representing 6.0% of total jobs in the Study Area. The construction sector in the SBC Study Area supports some 3,000 jobs[12] representing 6.4% of total jobs in the Study Area. This indicates that construction actively in the round is balanced, whilst a slight increase in activity across the SBC Study Area.

A13.5.29 Both Study Area's moreover exhibit a higher proportion of employment in the construction sector than the national average for Scotland (5.5%) indicating a healthy supply of construction labour across the Labour Market Study Area as a whole.

Onshore Wind Sector

A13.5.30 The UK onshore wind sector produces more electricity than any other renewable source, providing 30.2 million MWh of electricity to the UK Grid in 2018, equivalent to 27% of all renewable energy generated[13]. It is estimated that up to 35 GW of onshore wind could be needed across the UK by 2035 to accommodate the rapid uptake of electric vehicles and hybrid heat pumps alone (Vivid Economics and Imperial College London, 2019[14]). Recent research[15] by Renewables UK has called upon the UK Government to adopt an onshore wind target of 30GW by

[11] ONS (2019) Business Register and Employment Survey

[12] ONS (2019) Business Register and Employment Survey

[13] ONS (2018); Regional Renewable Statistics: Renewable Electricity by Local Authority; https://www.gov.uk/government/statistics/regional-renewable-statistics

[14] Vivid Economics and Imperial College London (2019) Accelerated electrification and the GB electricity system: https://www.theccc.org.uk/publication/accelerated-electrification-and-the-gb-electricitysystem/

[15] The onshore wind industry prospectus (2021) RenewableUK. Available at: https://cdn.ymaws.com/www.renewableuk.com/resource/resmgr/media/onshore_wind_prospectus_fina.pdf

2030. The research identified that around 80% of this need could be met in Scotland, resulting in an additional £27.8 billion in GVA and an additional 17,000 jobs; estimated that 8.6% of this figure would be met in the Scottish Borders.

A13.5.31 The Scottish Government has set an ambitious target of meeting 100% of Scotland's electricity demand from renewable sources by 2020. Onshore wind provides an important contribution to meeting this demand profile whist playing a key role in renewable mix required for the 2030 targets published in December 2017 Scottish Energy Strategy[16]. This Strategy states that by 2030 the equivalent of 50% of the energy for Scotland's heat, transport and electricity consumption to be supplied by renewable sources. It also notes that Onshore wind is amongst the lowest cost forms of power generation of any kind and is a vital component of the industrial opportunity that renewables create for Scotland.

A13.5.32 The importance of the onshore wind sector to the Scottish economy is further demonstrated by the identification of energy (including renewables), which includes the onshore wind sector, as a key growth sector within Scotland's Economic Strategy (2015).

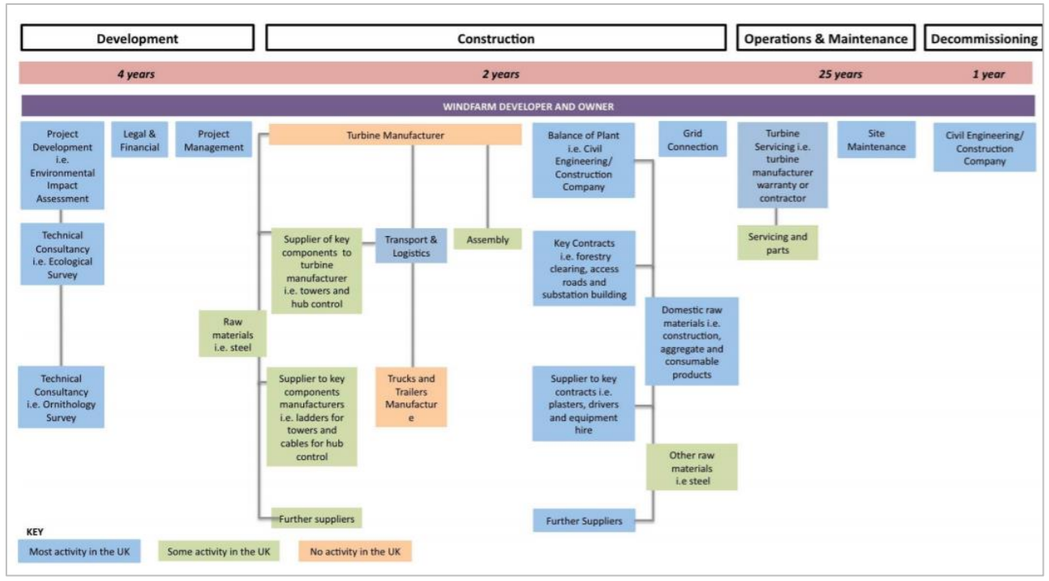
A13.5.33 Scotland is the UK's largest producer of onshore wind electricity, producing 18.0 million MWh in 2018 (60% of the UK total), while the Scottish Borders produced 1,781,903 MWh (9.9% of Scotland's total output)[17]. In 2017, the Scottish Government published the Onshore Wind Policy Statement[18] which states Scotland will continue to need more onshore wind development and capacity, in locations across our landscapes where it can be accommodated. This position is repeated in the Onshore Wind Policy Statement Refresh 2021: Consultation Draft (October 2021) which sets out the Scottish Governments ambition to secure an additional 8-13GW of installed onshore wind capacity by 2030.

A13.5.34 The onshore wind sector also makes an important economic contribution, creating employment opportunities throughout the development process, with operational and maintenance requirements often extending across the lifetime of the project. In 2017 the UK's 4,000 onshore wind businesses generated turnover of £2.8 billion, supported 5,300 direct jobs, and exported £53 million of goods and services[19].

Sector Supply Chain

A13.5.35 In addition to its direct employment impacts, the onshore wind sector supports a large and diverse supply chain. This includes technical consultancy, legal, financial and project management support during the development phase; manufacturing, transport, logistics and assembly opportunities during the construction phase; turbine servicing and site maintenance during the operation & maintenance phase and civil engineering during the decommissioning phase (see **Figure A13.2.4**).

Figure A13.5.4: Onshore Wind Supply Chain Opportunities



Source: Onshore Wind Direct & Wider Economic Impacts (Department of Energy & Climate Change, 2012).

Tourism and Recreation

Economic Importance of Tourism

A13.5.36 At national level the tourism sector is recognised by the Scottish Government as an important part of the Scottish economy, supporting a range of business activity and employment opportunities[20]. The importance of tourism is demonstrated in its status as one of the Scottish Government's six Growth Sectors[21].

A13.5.37 The latest available figures show that sustainable tourism generated £4.1 Billion GVA in 2018[22]. Of all overnight visits to Scotland in 2019, approximately 80% were made by UK residents (comprising 14.1 million trips), while the remaining 20% of overnight visits were from international visitors (comprising 3.5 million trips). Whilst only 20% of trips in 2019 were made by international visitors, their expenditure totalled £2.5 billion, or 43% of total overnight spend in Scotland[23], making 2019 the best year over the last decade in terms of international tourist expenditure for both Scotland and the UK as a whole. Of all tourism-based businesses in Scotland, hotels and similar accommodation is the largest sector, supporting over 47,000 jobs and generating almost £1.4 Billion GVA in 2018.

A13.5.38 In March 2020, the Scottish Tourism Alliance published Scotland Outlook 2030, a new tourism strategy focusing on sustainable tourism in Scotland. In 2019, the tourism sector generated around £12bn of economic activity in the wider Scottish economy, contributing around £7bn to Scottish GDP. It highlights the integral role which tourism

[16] Scottish Government (2017) Scottish Energy Strategy https://www.gov.scot/publications/scottish-energy-strategy-future-energy-scotland-9781788515276/

[17] ONS (2018); Regional Renewable Statistics: Renewable Electricity by Local Authority; https://www.gov.uk/government/statistics/regional-renewable-statistics

[18] Scottish Government (2017) Onshore Wind Policy Statement https://www.gov.scot/publications/onshore-wind-policy-statement-9781788515283/pages/3/

[19] RenewablesUK (2019); Quantifying Benefits of Onshore Wind to the UK; https://www.vivideconomics.com/wp-content/uploads/2019/08/Quantifying_the_Benefits_of-report-.pdf

[20] Scottish Government (2015). Scotland's Economic Strategy. Available at: https://www.gov.scot/publications/scotlands-economic-strategy/

[21] Scotland's Economic Strategy (2015). Page 42

[22] The Scottish Government defines sustainable tourism as a growth sector in the factsheet including named types of accommodation, food and drink, tour operator activities and reservations, museum activities, operation of historical sites and buildings and other similar attractions, zoological and botanical attractions, sports facilities and activities and amusement/theme parks and other attractions.

[23] Visit Scotland: Insight Department: Key Facts on Tourism in Scotland (2019) https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/key-facts-on-tourism-in-scotland-2019.pdf

plays across several other sectors and industries across Scotland, including hospitality and transport. However, the Strategy highlights several challenges to the continued success of the tourism sector in Scotland including changing travel patterns/plans in response to the climate emergency and skills and staff shortages, exacerbated by EU exist and the UK Governments Immigration Policy. Overall, the critical role that the tourism sector will continue to play in Scotland's sustainable economic development provides positive opportunities for growth both at national and community level.

A13.5.39 This status is reflected regionally, with tourism also identified as a key business sector by Scottish Borders Council within the Scottish Borders Economic Strategy 2023 (2013)[24]. This status is reflected through STEAM research [25] [26] which in 2016 identified tourism in the Borders as having an economic impact[27] of £204 million (a 5% increase from 2015), with approximately 1.8 million visits (of which 1.15 million were day visitors). The STEAM research (2016) identifies the positive impact from the Borders Railway as the most likely reason for the rise in visitor numbers (both day visitors and overnight trips). The Borders Railway connects the City of Edinburgh with Galashiels and Tweedbank in the Scottish Borders. The line was closed in 1969 however following campaigns, the line was re-opened with passenger service beginning in September 2015, with an official opening in September 2015. The STEAM research published in 2017 compared the period January – June 2015 prior to the reopening of the Borders Railway, finding that by January – June 2016 when the railway was operational, visitor days had increased by almost 11% in the same period. In addition, visitor spend was found to have increased by 16% and employment related tourism increased by 8% in the same period[28].

A13.5.40 Between 2017-2019, Visit Scotland data indicates that the average annual number of visits to the Scottish Borders[29] was estimated at approximately 3.07 million (of which 2.7 million were day visitors). Day visitors therefore make up the vast majority of visitors to the Borders region.

A13.5.41 Between 2017-2019, the average annual spend of all day and overnight visitors equated to £144m (equally split at £72m each), a 16% increase since 2016-2018.

Economic Importance of Tourism: Covid 19

A13.5.42 Since the onset of the Covid-19 pandemic, tourism has been one of the hardest hit industries in Scotland. Figures published in December 2020 show that only 14% of the UK population plan on taking a trip within the UK between December 2020 and March 2021, with Scotland the 5th most popular intended destination. As of 8th January 2021, there has been a significant decline in the proportion who expected to take 'the same or more' domestic overnight short breaks between now and March 2021 compared to normal. Prior to the onset of the pandemic, the Scottish Borders Economic Strategy 2023 identified tourism as a key opportunity for economic diversification and rural development in the Borders. Moving forward, it is anticipated that by capitalising on the ever-increasing visitor numbers pre-pandemic, that tourism will play a key role in the economic recovery of the Scottish Borders.

Characteristics and Assets

Visitor Attractions

A13.5.43 A Visit Scotland Survey[30] carried out between 2016-2018 identified the top five reasons given by respondents for visiting the Scottish Borders for a day trip were for a long walk (responsible for c.400,000 visits), a meal in a café/restaurant (responsible for c.400,000 visits),to visit the cinema (responsible for c.300,00 visits), a short walk/stroll (responsible for c.300,000 visits) and for adventure sports (responsible for c.300,000 visits).

A13.5.44 Of tourism attractions in the Scottish Borders, the most popular free attractions in terms of visitor numbers in 2019 were Tweed Valley Forest Park (347,763 people), St Abbs Head (63,721 people) and Newcastleton Forest (34,943). The top paid for attractions in terms of visitor numbers in 2019 were Melrose Abbey (61,325 people), Dawyck Botanic Garden (37,051 people) and Floors Castle (34,284 people).

A13.5.45 There are several heritage assets which attract visitors within the study area, including Neidpath Castle, Leithen Lodge, Kalzie Gardens, Glen House and Bowhill House and Gardens. Additionally, there is Traquair Estate which comprises of around 4,500 acres including around 300 acres of mixed forestry, around 20 listed buildings (either A or B listed) including Traquair House for which the land is also designated as a Garden and Designed Landscape. The estate provides a wide range of visitor attractions including a maze, café, sporting activities, a shop and a brewery. The latest visitor figures for Traquair House show that it attracted 31,256 paying visitors in 2018.

A13.5.46 It should be noted that some of the attractions identified above are outwith the Tourism and Recreation Study Area adopted in this assessment and therefore not likely to experience significant effects from the proposed development. They are however useful to note in that they make an important contribution to the tourism and recreation sector across the Scottish Borders.

A13.5.47 A visitor satisfaction survey[31] undertaken by Visit Scotland in 2015 and 2016 in the Scottish Borders indicates that of 127 respondents, 61% scored their overall experience as extremely good, scoring the Scottish Borders as 9 or 10 out of 10 with an overall average score of 8.6 out of 10. The 127 respondents were later asked how likely they would be to recommend the Scottish Borders to a friend, with 69% scoring 9 or 10 on the scale (extremely unlikely (1) to extremely likely (10)). Overall, visitor experience in the Scottish Borders was rated highly, with 94% of respondents giving scores of 7 or more out of 10. These figures indicate a strong likelihood that these visitors will return to the region.

A13.5.48 The Scottish Borders Tourism Strategy 2013-2020[32] sets out the aspirations for the tourism sector to 2020, aiming to inform the future direction of the tourism sector and the targets/goals it seeks to achieve. The Strategy aims:

"To grow tourism visits and spend in The Scottish borders, through positioning and promotion as a sustainable, year-round destination, which capitalises on its unique geography, heritage, natural environment and people."

A13.5.49 The Strategy sets out three strategic aims and a list of associated actions:

- **Providing authentic experiences** for: nature heritage and activities, destinations towns and villages, events and festivals and business tourism;
- **Improving the customer journey** for: food and drink, transport, accommodation and digital connectivity; and,
- **Building our capabilities** in: leadership and collaboration, quality skills (improve participation in training), marketing and sustainable tourism (green schemes).

[24] Scottish Borders Council (2013) The Scottish Borders Economic Strategy 2023. Available at: https://www.scotborders.gov.uk/download/downloads/id/456/economic_strategy.pdf

[25] STEAM Final Trend Report for 2009-2016 Scottish Borders Council. Available at: https://www.mbtag.uk/wp-content/uploads/2017/10/Steam-Report-Scottish-Borders.pdf

[26] The Scottish Tourism Economic Activity Monitor (STEAM) is a tourism economic impact modelling process developed by Global Tourism Solutions Ltd and which approaches the measurement of tourism from the bottom up, through its use of local supply side data and tourism performance and visitor survey data collection. The STEAM is capable of delivering robust outputs at a variety of geographical levels and, as such, has been adopted for use throughout the United Kingdom and overseas by tourist boards, local authorities, regional development agencies, national park authorities, and many other public and private sector organisations.

[27] Refers to totality of economic impact (direct at source and indirect supply chain impacts)

[28] STEAM Tourism- Economic Impact and Business Opportunities (2017) Available at: https://scottishborders.moderngov.co.uk/documents/s14922/Item%209%20-%20Economic%20Impact%20from%20Tourism%20-%20report.pdf

[29] Visit Scotland: Insight Department: Scottish Borders Factsheet (2019)

[30] Visit Scotland: Insight Department: Scottish Borders Factsheet (2019)

[31] Visit Scotland: Scotland Visitors Survey (Scottish Borders) 2015 & 2016. Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/scotland-visitor-survey-scottish-borders-2016.pdf

[32] Scottish Borders Tourism Strategy (2013) Available at: https://www.mbtag.uk/wp-content/uploads/2017/10/2013-2020-Scottish-Borders-Tourism-Strategy.pdf

- In September 2019, the Scottish Borders Council executive committee confirmed[33] that the development of a South of Scotland Tourism Strategy is underway. This will set out a 12-18 month programme of activity in preparation of the launch of a transformational 5-year Destination Development Programme. In the absence of any further updates on the Scottish Borders Council website, it is likely that this has been delayed as a consequence of the Covid-19 pandemic.
- In January 2020, tourism businesses in the Scottish Borders, Dumfries & Galloway and Midlothian collectively launched a new marketing campaign to attract visitors to the region, setting up 'Scotland Starts Here[34]' to showcase the unique qualities and attractions to be found in towns and villages across the southern belt. The website describes the history of Walkerburn and its establishment in 1846 and sets out recommendations for visitor accommodation, food and drink and outdoor activities such as the Bier Law Circular and Pirn Hill Fort.

Designated Walking and Other Recreational Routes

Recreational Resource

A13.5.50 The rural setting and upland topography of the Tourism and Recreation Study Area offers the ability to undertake a range of recreational pursuits in the open countryside and on designated or otherwise promoted recreational routes. Such activities may include walking, running, horse riding, mountain biking, orienteering and camping.

A13.5.51 **Chapter 6 - Landscape and Visual Amenity** of this EIAR identifies all Core Paths(<5 km) and a range of other promoted recreational routes, including the Southern Upland Way, within the Tourism and Recreation Study Area, and with visibility of the proposed development. The following area of relevance to this assessment:

- Tweed Valley;
- National Cycle Route 1
- Southern Upland Way;
- Core Paths:
  - No. 41 near Scroof Hill
  - No. 42- Stow-Blackhaugh
  - No. 161 Walkerburn- Priesthope
  - No. 163 Walkerburn - Minch moor
  - No. 181 Innerleithen- Walkerburn
- Cross Border Drove Road
- Tweed Valley Railway Path
- Scottish Hill Tracks:
  - No. 22: Peebles to Craig Douglas;
  - No. 23: Traquair (Innerleithen) to Tibbie Shiels Inn (St Marys Loch);
  - No. 24: Traquair (Innerleithen) to Ettrick by Yarrow;
  - No. 25: Traquiair to Yarrowford or Selkirk by Minch Moor;
  - No.26: Galashiels to Yarrowford (Broadmeadows) by Yair;
  - No.43: Peebles to Innerleithen (by Leithen Water); and,
  - No. 44: Peebles to Innerleithen (by 'The Tops').

A13.5.52 Two designated sites of International importance are located less than 1 km from the Proposed Development. Moorfoot Hills a Special Area of Conservation (SAC) and Site of Special Scientific Interest (SSSI) lies directly north of the Proposed Development (<1 km), designated for protected habitats and upland bird assemblage, and the River Tweed SAC (<1 km) lies to the south of the Proposed Development, with protected tributaries to the east of the Proposed Development, designated for salmon and lamprey species, and for freshwater habitats and species assemblage.

A13.5.53 Four additional sites, designated as a SSSI for upland and woodland habitats, are located within 5 km of the Proposed Development:

- Plora Wood (c. 2.1 km);
- Williamhope (c. 4.0 km);
- Nut Wood (c. 4.2 km);
- Glenkinnon Burn (c. 4.8 km); and,
- Gladhouse Reservoir Special Protection Area (SPA) and Ramsar site is located c. 12.5 km from the Proposed Development.
- Chapter 10 – Cultural Heritage of this EIAR also identifies a number of relevant designations. Within 1 km of the proposed development area (Inner Study Area), there are there are:
- Four Category B Listed Buildings (Elibank House, Holylee House, Old Holylee House, Reservoir, Kirnie Law)
- Six Category C Listed Buildings (Juniperbank, Walled Garden, Juniperbank, Holylee Cottages (Holylee Farm), Holylee Cottages (Holylee Farm), Holylee Lodge (Holylee House), Walled Garden (Holylee House); and
- Six Scheduled Monuments (Elibank Castle, The Common (settlement 400 m SE), Cairn Hill, cairn (Walkerburn), Walkerburn (cairn 500 m S of summit of Cairn Hill), Lee Tower, Old Caberston (scooped settlement 310 m E)

A13.5.54 Within this area there are no inventoried Battlefields, Conservation Areas, Properties in Care, inventoried Gardens and Designed Landscapes or World Heritage Sites.

A13.5.55 From the boundary of the ISA and within 10 km of the proposed turbine locations, there are no inventoried Battlefields, Properties in Care, or World Heritage Sites. There are three Conservation Areas, four inventoried Gardens and Designed Landscapes, 28 records of Category A Listed Buildings, 48 Scheduled Monuments within the OSA, and 14 Category B Listed Buildings within 5 m of the proposed turbine locations. For more information on study areas and identified designations, please see **Chapter 10- Cultural Heritage**.

Statutory Protections

A13.5.56 The Land Reform (Scotland) Act 2003 establishes a statutory right of responsible access to land and inland waters for outdoor recreation and crossing land. Under Section 13(1) of the Act, local authorities have a duty to "assert, protect and keep open and free from obstruction or encroachment any route, waterway or other means by which access rights may reasonably be exercised". This emphasises the importance afforded to maintaining continuity of public access to recreational routes in the countryside.

A13.5.57 Limited exceptions to this statutory right of access are set out within section 6 of the Act, with section 6(g)(i) specifically excluding access to land where "*building, civil engineering or demolition works*" are being carried out, and section 6(g)(ii) specifically excluding access to land where "*works being carried out by a statutory undertaker for the purposes of the undertaking*" are being carried out. However, Section 7(i) of the Act confirms that this restriction does not apply to Core Paths, which in the absence of a formal closure order must be kept open. Similarly, defined Public Rights of Way are legally considered to be roads, regardless of their current state and

[33] Scottish Borders Council Executive Committee. Available at: https://scottishborders.moderngov.co.uk/documents/s38770/Item%20No.%206%20-%20South%20of%20Scotland%20Tourism%20Action%20Plan%20-%20Executive%20-%2017%20September%202019%20-%20Draft.pdf

[34] https://scotlandstartshere.com/

usage. Consequently, to temporarily or permanently close or divert a Public Right of Way it is necessary to promote a formal order under the Countryside (Scotland) Act 1967.

Outdoor Tourist Destinations

A13.5.58 Tourist attractions often utilise the scenic and landscape value of the region, including the award winning 7Stanes Mountain Biking Centres of which the Scottish Borders contains two: Glentress Forest near the settlement of Peebles and Innerleithen, a small town in the committee area of Tweeddale. The proposed development benefits from proximity to a number of forests which comprise the Tweed Valley Forest Park, including Caberston Forest, Glentress Forest, Cardrona Forest, Thornylee Forest, Cadiemuir Forest, Glenkinnon Forest, Innerleithen Forest, and Yair Forest. These provide a variety of opportunities for outdoor recreational activities including walking, running, mountain biking, cycling and horse-riding. As aforementioned, the Central SDA benefits from the biking trails provided by 7Stanes Mountain Bike Trails at Glentress Forest & Innerleithen and the Tweed Valley Railway Path.

A13.5.59 Other local outdoor tourist attractions include:

- Haughhead Stables; guided pony rides, picnic experiences and riding holidays;
- Go Ape High Ropes Outdoor Activities
- Velvet Hall Alpacas; guided alpaca treks;
- Traquair House Gardens and,
- Kalzie Gardens.

A13.5.60 The value of scenery and landscape is further reflected in the activities undertaken by visitors who choose to visit the Scottish Borders. The Visit Scotland Visitor Survey 2015 & 2016[35] found that 67% of visitors to the Scottish Borders were attracted by the scenery & landscape, 47% for the history and culture and 42% because they have always wanted to visit the Borders. Approximately 35% of visitors stated that they had visited before and had returned.

A13.5.61 The top 10 activities undertaken by visitors to the Scottish Borders, included:

Table A13.5.2 - Visit Scotland Visitor Survey 2015-2016- Top 10 Activities Undertaken by Visitors.

	125
Sightseeing by car / coach / on foot	72%
Visited a historic house, stately home, castle	57%
Visited a cathedral, church, abbey, other religious building	53%
Short walk, stroll	52%
Long walk, hike, ramble	43%
Visited a country park / garden	39%
Shopping	38%
Visited cities	33%
Centre based walking	31%
Visited a beach	30%

A13.5.62 The GoApe outdoor activity centre in Glentress Forest provides a variety of outdoor activities including treetop adventures and zip line courses. It is one of three GoApe locations in Scotland. Another popular outdoor activity is the Mighty Deerstalker Race held annually each March at Traquair Estate. The night-time race covers distances of both 5 km and 10 km with many runners taking part by wearing tweed. The race had around 3,000 runners in 2019[36]. The last race took place on 14th March 2020, with the 2021 race cancelled due to the Covid-19 pandemic. The race will return on 11th March 2023 for the final time.

A13.5.63 It should be noted that some of the attractions identified above are outwith the Tourism and Recreation Study Area adopted in this assessment and therefore not likely to experience significant effects from the proposed development. They are however useful to note in that they make an important contribution to the tourism and recreation sector across the Scottish Borders.

Hospitality

A13.5.64 In a Visit Scotland survey undertaken between 2016-2018[37], eating out was the second most popular activity undertaken as part of a day trip to the Scottish Borders, responsible for c.400,000 visits. A previous visit Scotland survey undertaken between 2015 & 2016[38] found that 21% of respondents scored the Scottish borders 9 or 10 out of 10 for satisfaction with value for money when eating out, scoring an average overall score of 7.2 out of 10. With regard to satisfaction of availability of local produce when eating out, 24% scored this 9 or 10 out of 10, scoring an average overall score of 7.5 out of 10. Hospitality businesses including those located within hotels are mostly located in key settlements Galashiels, Peebles & Innerleithen. In Galashiels, these are mainly located along Bank Street, in Peebles along High Street/Eastgate and in Innerleithen along the A72. Other hospitality businesses are located in smaller towns and villages throughout the study area including but not limited to Walkerburn, Cardrona, Traquair, Eddleston, Stow, Clovenfords and Bowhill. Key hospitality businesses of note within the Study Area are listed in Section 6: Receptor Sensitivity.

A13.5.65 The assessment presented within this Chapter assesses the likely effects on the hospitality component of the tourism and recreation sector rather than attempting to identify likely effects on all individual hospitality businesses located within the Tourism and Recreation Study Area, many of which are likely to experience no effects due to a lack of theoretical visibility and separation distances from roads likely to be used during construction, operation and decommissioning.

Visitor Accommodation

A13.5.66 The economic contribution of the tourism sector is underpinned by visitor accommodation. The average number of overnight visits to the Scottish Borders by both British and international visitors totalled 3.074 million between 2017 and 2019, a decrease of 7% from 2016-2018. Between 2016-2018, only one in twelve overnight visits were made by international travellers. Of overnight visits to the Scottish Borders within this period, 92% were from UK visitors, with the remaining 8% from international visitors.

[35] Based on 127 respondents. Visit Scotland Visitor Survey 2015-2016. Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/scotland-visitor-survey-scottish-borders-2016.pdf

[36] Edinburgh Reporter (17/03/19) Available at: https://theedinburghreporter.co.uk/2019/03/the-mighty-deerstalker-trail-racing-at-traquair-house/

[37] Visit Scotland: Insight Department: Scottish Borders Factsheet (2019)

[38] Of 120 respondents: Visit Scotland Scottish Borders Visitor Survey 2015-2016. Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/scotland-visitor-survey-scottish-borders-2016.pdf

A13.5.67 Visitors to the Scottish Borders generated £144 million of expenditure from both day and overnight visitors from 2017 to 2019. In 2019, average net occupancy rates for hotels in the region totalled 57% for hotels, 39% for guest houses/B&Bs and 52% for self-catering accommodation[39].

A13.5.68 In February 2020, the initial impacts of the Covid-19 pandemic on international visitor numbers were starting to show in the Scottish Borders. Room occupancy was at 38.48%, down 4.67% from February 2019 when the occupancy rate was 43.15%. Overall for Scotland, room occupancy was down by 14.6% in February 2020 (37.88%) compared with February 2019 (52.48%).

A13.5.69 With regard to bed occupancy for Scotland, this has fallen by 3.37% between February 2019 (31.99%) and February 2020 (28.62%). In the Scottish Borders, bed occupancy had fallen by 1.4% between February 2019 (31.47% and February 2020 (30.07%)[40].

A13.5.70 The revenue per available occupied room across Scotland in 2020 was £94.67 up from £81.17 in February 2019. The most popular room tariff across Scotland is those within the £40-£49.99 bracket, with room occupancy up 6.43% between February 2019 and February 2020.All other tariff types up to £70+[41] reported a reduction in occupancy between February 2019 and February 2020. This suggests that mid-level budget hotels are the most popular choice for overnight visitors.

A13.5.71 Domestic overnight visitors to the Borders between 2017-2019 were primarily from England and Wales (53%) followed by elsewhere in Scotland (39%).

A13.5.72 The Borders region does however also attract a wide variety of international visitors with the largest numbers bring from the Netherlands (20%), Germany (16%), Switzerland (12%) USA (12%) and France (12%) 2017-2019.

A13.5.73 A Visit Scotland Visitor Survey[42] carried out between 2015-2016 found that when testing the satisfaction of value of money for accommodation, 36% scored 9 or 10 out of 10, scoring an average of 7.8 out of 10. When asked if they were satisfied with the service provided by staff at accommodation, 48% scored 9 or 10 out of 10, with an average score of 8.2 out of 10.

A13.5.74 When asked if they were satisfied with the knowledge of staff at accommodation about things to do in the area, 42% scored 9 or 10 out of 10, with an average score of 8.1 out of 10. When asked about their satisfaction with availability of free wifi at accommodation, 40% scored 9 or 10 out of 10, with an average score of 6.9 out of 10.

A13.5.75 The assessment presented within this Chapter assesses the likely effects on the visitor accommodation component of the tourism and recreation sector rather than attempting to identify likely effects on all individual visitor accommodation businesses located within the Tourism and Recreation Study Area, many of which are likely to experience no effects due to a lack of theoretical visibility and separation distances from roads likely to be used during construction, operation and decommissioning. Key visitor accommodation businesses of note within the Study Area are listed in Section 6: Receptor Sensitivity.

Recreational Activities in The Open Countryside

A13.5.76 There are many popular recreational activities along the River Tweed in the Tweed Valley. The River Tweed flows for 97 miles through Innerleithen, Peebles and Galashiels and on to Berwick upon Tweed and into the North Sea, including mountain biking, running, fishing, canoeing and cycling. Local heritage assets such as Cairn Hill Cairn and Pirn Hill Fort provide opportunities to enjoy the cultural heritage of the area, representing locally popular recreational routes.

A13.5.77 In addition to walking and heritage-based tourism, golf tourism is also important to South Scotland and the Scottish Borders. The economic value of golf to the south of Scotland in 2016 was valued at £6.3m, supporting 173 jobs[43]. Visitors to the golf clubs in the south of Scotland were recorded as most likely to be from Scotland (60%) or from the rest of the UK (39%). The vast majority of golf visitors in 2016 were male (96%) and 4% were female, with 47% of all golf visitors aged 25 to 54 years and 47% aged over 55 years, slightly younger than the Scottish average (52%).

A13.5.78 Almost all of the visitors to South Scotland who were from the rest of the UK and overseas (92%) have been to Scotland before, while only 8% were first time visitors, less than the Scotland wide average (30% first time visitors). This suggests that south Scotland attracts a high number of repeat visitors from other parts of Scotland and the UK.

A13.5.79 Of the golf visitors from outside of Scotland (rest of UK and overseas) who visited the south of Scotland, 33% said they had taken a golfing holiday in Scotland before and wanted to return, 27% came on a recommendation from family/friends and 21% visited due to Scotland's reputation as a key golf destination[44].

A13.5.80 There are many golf clubs in the study area, including Peebles Golf Club, Cardrona Golf & Country Club, Innerleithen Golf Club, Galashiels Golf Club and Torwoodlee Golf Club. These golf clubs also play a key role for visitors, providing bars and restaurants before, during and after golf.

Tourists Travelling (By Road) Through the Open Countryside

A13.5.81 Travelling to, from or between tourist destinations, recreational activities or hospitality/accommodation itself forms part of the overall tourism experience. Tourists may select particular accommodation or destinations owing to their accessibility (amongst other factors), and any unexpected disruption to journeys may detract from their enjoyment of the experience. Key routes of note include:

- A72 Road (scenic route);
- A7 Road;
- B7007 Road
- B709 Road;
- B6362 Road
- B7062 Road
- National Cycle Route (NCR) 1 south of Innerleithen;
- Tweed Cycle Way;
- A Roads throughout the Tweed Ettrick and Yarrow Confluences SLA; and,
- Other Minor Roads.

A13.6 RECEPTOR SENSITIVITY

A13.6.1 The key components of the tourism and recreation sector can be categorised into 7 broad groupings:

- Designated walking and other recreational routes;
- Outdoor tourist destinations;

[39] Visit Scotland: Insight Department: Scottish Borders Factsheet (2019)

[40] Room Occuancy/Bed Occupancy rates, Moffat Centre. Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/accommodation-occupancy-reports/visitscotland_saos_hotel_february-2020.pdf

[41] Room Occuancy/Bed Occupancy rates, Moffat Centre. Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/accommodation-occupancy-reports/visitscotland_saos_hotel_february-2020.pdf

[42] Of 120 respondents: Visit Scotland Scottish Borders Visitor Survey 2015-2016. Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/scotland-visitor-survey-scottish-borders-2016.pdf

[43] Scotland Golf Visitor Survey 2016 Regional Report- South Scotland. Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/golf-south-scotland-2016.pdf

[44] Scotland Golf Visitor Survey 2016 Regional Report- South Scotland. Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/golf-south-scotland-2016.pdf

- Indoor tourist destinations;
- Hospitality;
- Visitor Accommodation;
- Recreational activities in the open countryside; and,
- Tourists travelling (by road) through the open countryside.

A13.6.2 Of these, indoor tourist destinations are not likely to experience a significant effect on their visitor attractiveness or tourism potential and thus can be scoped out from further consideration. This is owing to the main features of such destination being experienced indoors, often on a localised or special interest basis, and therefore being unrelated to the surrounding landscape.

A13.6.3 The visitor attractiveness and tourism potential of each of the remaining (six) receptor grouping could be affected by environmental or socio-economic changes (i.e. 'primary effects'), including likely effects from the construction or operation of the proposed development as assessed in other technical assessment chapters of the EIAR. These six receptor groupings have therefore been considered in the assessment of the proposed development

A13.6.4 In relation to the assessment of 'primary' effects on recreational access during the construction phase of the proposed development, the sensitivity of impacted designated walking routes was assigned based on their recognition in policy terms at the national level (e.g. within NPF3) and the level of statutory protection afforded to them (for example under the Land Reform (Scotland) Act 2003). In relation to the assessment of wider 'secondary' effects on the identified key components of the tourism and recreation sector, the sensitivity of each receptor grouping was assigned based on both the importance of identified tourism assets within the Tourism and Recreation Study Area and the susceptibility of changes in the visitor attractiveness of such assets ultimately catalysing changes in visitor numbers and tourist expenditure.

A13.6.5 This captures the elasticity of demand of each receptor grouping and the key question to underpin the identification of receptor sensitivity was therefore: "To what extent would any change in the visitor attractiveness and tourism potential of this component of the tourism and recreation sector (i.e. this receptor grouping) be likely to result in a change in visitor numbers and expenditure?". This socio-economic based sensitivity level differs from user-based landscape, visual, cultural heritage and access sensitivities assigned to individual tourism and recreation related receptors, as identified separately in relevant technical assessment chapters of this EIAR.

A13.6.6 The socio-economic based sensitivity level differs from user-based landscape, visual, cultural heritage and access sensitivities assigned to individual tourism and recreation related receptors, as identified separately in relevant technical assessment chapters of this EIAR. Of note, sensitivity ratings assigned to the tourism and recreation sector have not been adjusted in response to the COVID-19 pandemic, as whilst sectoral performance is presently substantially reduced compared with pre-pandemic levels this does not detract from the continued importance of the sector to local, regional and national economies.

A13.6.7 Taking account of the importance of identified tourism assets within the Tourism and Recreation Study Area and the susceptibility to changes in visitor attractiveness and tourism potential catalysing changes in visitor numbers and expenditure, the sensitivity of each reception grouping is identified in **Table A13.6.1** below.

Table A13.6.1 - Detailed Summary of Receptor Sensitivity

Sensitivity of Tourism and Recreation Receptor Groupings	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
Labour Market					
Labour market		Changes in employment	The Labour Market Study Area exhibits a higher rate of employment and skills than national comparators. Whilst it does exhibit a lower median full time gross annual pay than Scotland, minimal distortions from the impacts of the Proposed Development are likely to occur.	**TTWA Study Area:** Low **SBC Study Area:** Low	Construction
Key Business Sectors					
Construction		Changes in sectoral activity and performance	The construction sector in the TTWA Study Area supports some 1,500 jobs[45] representing 6.0% of total jobs in the Study Area. The construction sector in the SBC Study Area supports some 3,000 jobs[46] representing 6.4% of total jobs in the Study Area. Construction firms are productive compared to the national average for Scotland (5.5%) indicating a healthy supply of construction labour across the Labour Market Study Area. Whilst there is a slight increase in activity across the SBC Study Area, it is not anticipated to distort the market significantly. The presence of other significant construction projects in the region may result in increased competition for contractors and workers.	**TTWA Study Area:** Low **SBC Study Area:** Low	Construction
Onshore Wind		Changes in sectoral activity and performance	In 2017, the UK's 4,000 onshore wind businesses generated turnover of £2.8 billion, supported 5,300 direct jobs, and exported £53 million of goods and services[47]. The onshore wind sector provides an important contribution to meeting in meeting ambitious targets set out by both the UK and Scottish Government. The delivery of the Proposed Development will directly contribute towards this sector.	**TTWA Study Area**: Medium **SBC Study Area:** Medium	Operation
Tourism and Recreation					
Designated walking and recreational routes	National Cycle Routes (NCR): No. 1 Long Distance Routes: Southern Upland Way Cross Border Drove Road Tweed Valley Railway Path	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	These routes, including but not limited to Core Paths and long-distance walking trails, are recognised in policy terms at the national level (e.g. within NPF3) and are awarded a level of legal protection (for example under the Land Reform (Scotland) Act 2003) as being important tourism and recreational assets.	Medium	Construction and operation

[45] ONS (2019) Business Register and Employment Survey

[46] ONS (2019) Business Register and Employment Survey

[47] RenewablesUK (2019); Quantifying Benefits of Onshore Wind to the UK; https://www.vivideconomics.com/wp-content/uploads/2019/08/Quantifying_the_Benefits_of-report-.pdf

Sensitivity of Tourism and Recreation Receptor Groupings	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
	SBC Core Paths: No. 41 near Scroof Hill No. 42- Stow-Blackhaugh No. 161 Walkerburn- Priesthope No. 163 Walkerburn - Minch moor No. 181 Innerleithen- Walkerburn Scottish Hill Tracks: No. 22: Peebles to Craig Douglas No. 23: Traquair (Innerleithen) to Tibbie Shiels Inn (St Marys Loch) No. 24: Traquair (Innerleithen) to Ettrick by Yarrow No. 25:Traquiair to Yarrowford or Selkirk by Minch Moor No.26: Galashiels to Yarrowford (Broadmeadows) by Yair No.43 : Peebles to Innerleithen (by Leithen Water) No. 44: Peebles to Innerleithen (by 'The Tops')		They enable access to a range of visitor attractions and themselves provide opportunities for recreational activities including walking, cycling and horse-riding. However, any change in the amenity value (i.e. visitor attractiveness) of an individual route is not itself likely to catalyse a major change in overall visitor numbers and associated expenditure across the Tourism and Recreation Study Area.		
Outdoor tourist destinations	Tweed Valley Forest Park (and associated forest network) 7 Staines (Glentress) 7 Staines (Innerleithen) Traquair House Gardens Kalzie Gardens Go Ape Pirn Hill Fort Haughhead Stables Velvet Hall Alpacas	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	These destinations form a core offering of the tourism and recreation sector, i.e. they are established attractions which tourists choose to visit owing to their special features or characteristics. The importance, scale and type of destination varies considerably, but the common element is that the destination is experienced outdoors in the context of the surrounding landscape. Owing to the heterogeneous nature of these assets and since each destination provides a specific tourist offering, any change in the visitor attractiveness of an individual destination is not itself likely to catalyse a major change in overall visitor numbers and associated expenditure across the Tourism and Recreation Study Area.	Low	Construction and operation
Hospitality	Key hospitality businesses of note within the identified larger settlements within the Study Area include the following of note: No.1 Peebles Road Restaurant Saffron Innerleithen Café Sitooterie It is noted that many of the visitor accommodation receptors listed below will contain hospitality businesses	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Similar to indoor tourist destinations, bars and restaurants are likely to be largely experienced indoors and focused on the quality of the hospitality offering, although establishments with an attractive landscape setting may use this to differentiate themselves from competitors. Owing to the heterogeneous nature of these assets, any change in the visitor attractiveness of an individual hospitality establishment is not itself likely to catalyse a major change in overall visitor numbers and associated	Low	Construction and operation

Sensitivity of Tourism and Recreation Receptor Groupings	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
	forming a key reason for non-residents choosing to visit, key restaurants of this nature include: Traquair Arms Hotel Corner House Hotel Renwicks Restaurant/ Spikes Bar (Macdonald Cardrona Hotel) The Grill Room (Peebles Hydro)		expenditure across the Tourism and Recreation Study Area.		
Visitor Accommodation	Key visitor accommodation businesses of note within the Study Area include the following of note: Glentress Hotel Traquair House Traquair Arms Hotel Caddon View Tweedside Caravan Park Glentress Forest Lodges Macdonald Cardrona Hotel Corner House Hotel Peebles Hydro Neidpath Castle Elibank House Leithen Lodge The Glen Watson Lodge Guest House Monorene Guest House	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Similar to outdoor tourist destinations, visitor accommodation (hotels, guest houses, B&Bs and campsites) form a core offering of the tourism and recreation sector, i.e. tourists stay in short term accommodation either to visit local destinations or simply to relax by making use of on-site amenities. As with hospitality assets, visitor accommodation is likely to be largely experienced indoors and focused on the quality of the accommodation itself (and associated amenities), although establishments with an attractive landscape setting may use this to differentiate themselves from competitors. The setting, quality, scale and type of accommodation within the Tourism and Recreation Study Area varies considerably, but one common element is that the accommodation is situated within the landscape. Owing to the heterogeneous nature and offering of visitor accommodation, any change in the visitor attractiveness of an individual destination is not itself likely to catalyse a major change in overall visitor numbers and associated expenditure across the Tourism and Recreation Study Area	Low	Construction and operation
Recreational activities in the open countryside	Peebles Golf Club Cardrona Golf & Country Club Innerleithen Golf Club Galashiels Golf Club Torwoodlee Golf Club Cairn Hill Cairn Pirn Hill Fort	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Similar to designated routes and outdoor tourist destinations, areas of open countryside (land and water) form a core offering of the tourism and recreation sector as they provide (outdoor) opportunities for undertaking specific recreational activities, with access for recreational purposes guaranteed under the Land Reform (Scotland) Act 2003. The type of activity undertaken varies considerably and may be terrestrial or water based, with experiential value generated largely by participating in the activity itself. However, recreational activities undertaken outdoors are experienced in the context of the	Low	Construction and operation

Sensitivity of Tourism and Recreation Receptor Groupings	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
			surrounding landscape and an attractive landscape setting may contribute to experiential value. Owing to the heterogeneous nature of recreational activities and their landscape settings, any change in the attractiveness of undertaking an individual activity is not itself likely to catalyse a major change in overall visitor numbers and associated expenditure across the Tourism and Recreation Study Area.		
Tourists travelling (by road) through the open countryside	A72 (west) A72 (east) B7007/B709 (north) B709 (south) B6362 B7062	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Travelling to, from or between tourist destinations, recreational activities or hospitality/accommodation itself forms part of the overall tourism experience. Tourists may select particular accommodation or destinations owing to their accessibility (amongst other factors), and any unexpected disruption to journeys may detract from their enjoyment of the experience. Changes in visual amenity would only be experienced momentarily throughout a journey and thus are less likely to detract from the overall experience. Beyond potentially impacting on individual tourism experiences, any change in the amenity of tourists whilst travelling through the open countryside is not itself likely to catalyse a major change in overall visitor numbers and associated expenditure across the Tourism and Recreation Study Area.	Low	Construction and operation

Summary of Receptor Sensitivity

A13.6.8 **Table A13.6.2** below summarises the sensitivity of socio-economic, tourism and recreation receptors likely to experience effects from the Proposed Development and thus requiring to be considered within the impact assessment presented in **Chapter 13** of the EIAR.

Table 13.6.2: Summary of Receptor Sensitivity

Receptor	Type of Effect	Sensitivity	Phase of Likely Effect(s)
Labour Market			
Labour market	Changes in employment	**TTWA Study Area:** Low **SBC Study Area:** Low	Construction
Key Business Sectors			
Construction	Changes in sectoral activity and performance	**TTWA Study Area:** Low **SBC Study Area:** Low	Construction
Onshore Wind	Changes in sectoral activity and performance	**TTWA Study Area**: Medium **SBC Study Area:** Medium	Operation
Tourism and Recreation			
Designated walking and recreational routes	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Medium	Construction and operation
Outdoor tourist destinations	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Low	Construction and operation
Hospitality	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Low	Construction and operation
Visitor Accommodation	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Low	Construction and operation
Recreational activities in the open countryside	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Low	Construction and operation
Tourists travelling (by road) through the open countryside	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Low	Construction and operation