

14.2 Detailed Baseline Conditions

Job Name: Lomond Banks – Socio-economic, Tourism, Recreation and Public Access
Chapter

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Subject: Appendix 14.2 – Detailed Baseline Conditions

1 Detailed Baseline Conditions

1.1 Introduction

1.1.1 This appendix supports the assessment of likely significant socio-economic, tourism, recreation and public access effects from Lomond Banks (‘the Proposed Development’) on land to the north of Balloch.

1.1.2 The purpose of this appendix is to characterise the existing socio-economic, tourism, recreation and public access conditions (the baseline) and to identify the sensitivity of relevant receptors likely to be affected by the Proposed Development during its construction and operational phases.

1.1.3 The appendix is structured as follows:

- Methodology;
- Key Receptors;
- Scoping Responses;
- Baseline Conditions; and
- Receptor Sensitivity.

1.2 Methodology

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

- **Socio-economic and Labour Market Study Area:** Socio-Economic receptors that affect the local and wider labour market will be assessed for three areas surrounding the development, the local area with a 15-minute drive time catchment, the wider area with a 30-minute catchment and the wider area with a 45-minute catchment;
- **Tourism and Recreation Study Area:** Tourism effects will be assessed within a 7.5km radius of the site, capturing key tourism and recreational assets. This Study Area will consider the ‘primary’ visual and setting effects (reported within **Chapter 11 – Landscape**

and Visual Impact) from the Proposed Development with the potential to generate 'secondary' tourism and recreation effects from the Proposed Development and the potential to generate visual and setting effects. This assessment will capture likely significant effects as reported within **Chapter 11 – Landscape and Visual Impact; Chapter 12 – Traffic and Transport;** and **Chapter 13 – Archaeology and Cultural Heritage;** and

- **Public Access Study Area:** Public access effects will be assessed within a 10km radius of the site, capturing key public access routes and tourist recreational routes.

Key Receptors

Labour Market

1.2.2 For employment effects, the availability of labour and skills is critical in accommodating the demands, needs and requirements of the Proposed Development. The sensitivity of the labour market is defined by the following considerations:

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

Key Business Sectors

1.2.3 The key business sectors of construction and Accommodation and Food Services are relevant to the Proposed Development and have therefore been considered as receptors in the assessment of likely socio-economic effects.

1.2.4 The sensitivity of these sectoral receptors has been determined with reference to their importance to the 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.

Public Access

1.2.5 For public access effects, the national, regional and local importance of each identified receptor was considered to determine the sensitivity of each to change resulting from the Proposed Development.

Tourism and Recreation

1.2.6 Key components of the tourism and recreation business sector with the potential to be affected by the Proposed Development were identified, as well as considering impacts on the sector as a whole. Notwithstanding the unique characteristics and offerings of all individual tourism and recreational assets across the Tourism and Recreation Study Area, receptors of relevance to this assessment can be categorised under six broad groupings, each with varying sensitivity to changes in visitor attractiveness:

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

1.2.7 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 6**. 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.

Scoping Responses

1.2.8 **Table 14-1** below outlines the Scoping consultation responses relevant to **Chapter 14 – Socio-economics, Tourism, Recreation and Public access**.

Table 14-1: Scoping Responses

Consultee	Source	Issue Raised	Response/Action
LLTNPA	Formal Scoping Response	Notes that the socio-economic chapter consider public access with cross reference to the Traffic and Transport EIAR Chapter where relevant. Recommended that 'access' is stated in the topic/chapter heading.	Chapter 11 – Socio-economics, Tourism, Recreation and Public Access provides an assessment of likely significant effects on all identified socio-economic (labour market), tourism and recreation and public access receptors within each of the defined Study Areas.
	Formal Scoping Response	Accessibility to, and any impacts of, the Proposed Development on public and core paths during the construction and operation phases should be clearly identified and assessed within the Chapter.	Noted. Chapter 11 – Socio-economics, Tourism, Recreation and Public Access assess the accessibility to and impacts on key public access routes during both the construction and operation of the Proposed Development. Information is also provided with regard to embedded/further mitigation within this Chapter.
	Formal Scoping Response	Consider impacts on core paths and rights of way but also areas that presently provide unhindered movement and informal routes that may not be designated. In particular, the woodlands and loch-side beaches are popular with visitors and residents. Beach side recreation (alongside the Maid of the Loch slipway	Noted. Chapter 11 – Socio-economics, Tourism, Recreation and Public Access assess any impacts on key public access routes as well as areas that provide unhindered movement/informal routes. A full list of identified receptors of relevance to this assessment are

Consultee	Source	Issue Raised	Response/Action
		& NE Drumkinnon Bay) is well established largely due to convenient access, high quality views and a gradually sloping beach / shallow water.	presented in Section 6 – Receptor Sensitivity .
	Formal Scoping Response	Consider the potential and perceived barriers to public access that may arise in relation to the Proposed Development and propose suitable mitigation to maintain barrier free public access.	Noted. Chapter 11 – Socio-economics, Tourism, Recreation and Public Access considers the potential and perceived barriers to public access during the construction and operation of the Proposed Development in the assessment. Further information is provided with regard to embedded and further mitigation where appropriate.
	Formal Scoping Response	Consider any associated impacts on the peninsula forming the NW part of Drumkinnon Bay and opportunities to retain and enhance public access.	Noted. Chapter 11 – Socio-economics, Tourism, Recreation and Public Access considers any impacts on public access to the peninsula forming the NW part of Drumkinnon Way (as identified in Section 6 – Receptor Sensitivity).
	Formal Scoping Response	To avoid repetition with the landscape and visual chapter, the visual effects relating to the recreation network need not be scoping into this Chapter. The assessment of the impacts on the recreation network in this Chapter should focus on visitor numbers and identify and pressures or conflicts that may arise.	Noted. Chapter 11 – Socio-economics, Tourism, Recreation and Public Access assess the visitor attractiveness and tourism potential of each of the identified receptor groupings which could be affected by socio-economic, tourism and recreation changes. This Chapter considers the visual and setting effects from the Proposed Development only insofar as they may influence visitor behaviour.
	Formal Scoping Response	Consultation should be undertaken with LLTNP Access Team with regard to rights of way/core paths and access within the National Park. Consideration should also be given to the previous comments in respect of application 2018/0133/PPP.	Noted. Consultation has been undertaken with the relevant groups and stakeholders including statutory and non-statutory consultees. A meeting with the LLTNP Access Officer took place on the 20 th April 2022 to discuss public access and rights of way with regards to the Proposed Development. Further information on consultations are outlined in Section 1.3 - Consultation of Chapter 14 – Socio-economics, Tourism, Recreation and Public Access Chapter .
Historic Environment Scotland	Formal Scoping Response	Provides a list of nationally important historic environment assets including: <ul style="list-style-type: none"> ▪ Woodbank House with Garden Building; ▪ Loch Lomond; 	Chapter 10 – Archaeology and Cultural Heritage provides an assessment of likely significant effects on heritage assets including scheduled monuments and listed

Consultee	Source	Issue Raised	Response/Action
		<ul style="list-style-type: none"> ▪ Drumkinnon Bay; ▪ Winch House including slipway; ▪ Balloch Castle. <p>The response notes the potential for adverse impacts.</p>	<p>buildings. Building on this, the assessment of likely tourism and recreational effects provided in this chapter considers the likely effect of such effects on tourism interests and recreational activities where relevant.</p>
Nature Scot	Formal Scoping Response	<p>Notes that designated sites and the habitat and location of the proposed site identified are unlikely to be impacts. However, it is recommended that these sites are considered with regards to the potential indirect effects resulting from an increase in visitor numbers to the area.</p>	<p>Chapter 5 – Ecology sets out a range of proposed mitigation measures for the Proposed Development, taking account of potential impacts from construction and operation on qualifying interests and designations.</p>
	Formal Scoping Response	<p>Notes that advice in relation to impacts on landscape interests within the National Park, non-designated natural heritage interests and outdoor access issues should be determined by the LLTNPA.</p>	

Baseline Conditions

Settlement Profile

- 1.2.9 Relevant baseline conditions are presented for the Socio-economic and Labour Market; Tourism and Recreation; and Public Access Study Areas where information is available. Scotland has been used as a comparator where appropriate.

Settlement Profile

- 1.2.10 LLTNP borders West Dunbartonshire to the south; Argyll and Bute to the north and east; and Stirling to the west. The National Park encompasses around 1,865 sq.km of land and roughly 50% of Scotland's population live within an hour's drive of the park¹. Despite being situated within the LLTNP local planning authority boundary, the Site also sits within the administrative boundary of West Dunbartonshire Council. The site is located in Balloch.
- 1.2.11 LLTNP is formed from parts of West Dunbartonshire to the south; Argyll and Bute to the north and east; and Stirling to the west. The National Park encompasses around 1,865 sq.km of land and roughly 50% of Scotland's population live within an hour's drive of the park². Despite being situated within the LLTNP local planning authority boundary, the Site sits within the administrative boundary of West Dunbartonshire Council. The site is located in Balloch and benefits from strong connectivity with West Dunbartonshire and Glasgow to the south via the A82 and railway line, benefitting the local economy, tourism, recreation and visitor sector.

¹ Loch Lomond and the Trossachs National Park (No Date). Key Facts. Available online at: <https://www.lochlomond-trossachs.org/discover-the-park/key-facts/>

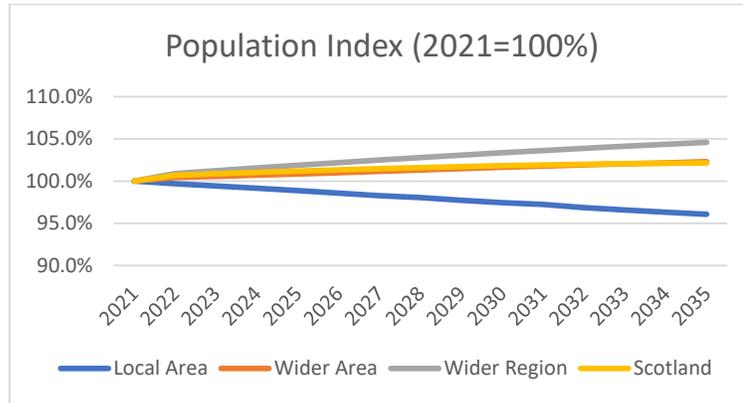
² Loch Lomond and the Trossachs National Park (No Date). Key Facts. Available online at: <https://www.lochlomond-trossachs.org/discover-the-park/key-facts/>

Socio-economic and Labour Market

Population

1.2.12 The local area has experienced a population increase between 2001 and 2019 (5%). The population of the wider area and wider region have also risen (9% and 11% respectively). This increase is similar to that experienced across Scotland (11%). To 2035, the population of the local area is anticipated to continue to grow, albeit at a slower rate (2%) and the population of the wider area and wider region will increase (7% and 10% respectively).

Figure 1: Population Index (2021 = 100%)

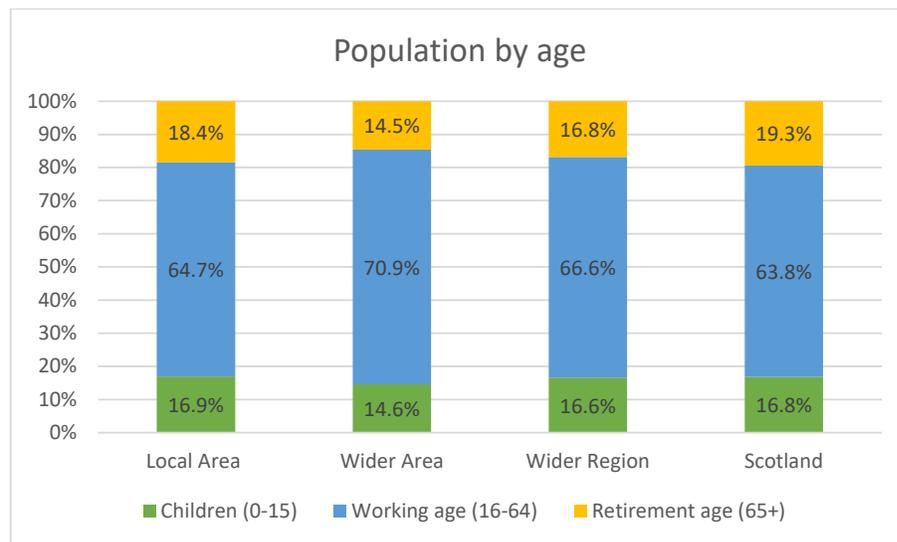


Source: Stantec Calculations using 2021 Data

Age Structure

1.2.13 The age structure in the local area reflects an aging population relative to the wider area, wider region and Scotland. There is a higher proportion of people aged over 65 in the local area when compared with the wider area and region. The proportion of children (aged 0 to 15) is similar to that of the wider region and Scotland.

Figure 2: Age Structure



Source: Stantec Calculations using 2021 Data

1.2.14 The proportion of working age people is declining across the study area and in Scotland. In the local area, the working age population decreased by 3% from 2001 to 2021 and is predicted to decrease a further 8% to 2035. Contraction in the working age population is also expected in the wider area (falling by 9%) while in the wider area there is expected to be a 12.7% increase. A further 12% and 1.2% respectively are predicted for the 2021-2035 period. The local area has a declining proportion of working age people and an increasing dependency ratio which is likely to put additional pressure on services in the area. Indeed, to 2035, the retirement age population in the local area is predicted to increase by 35% from 2021. This is above the wider area and wider region (31% and 32% respectively) and slightly above expected growth in Scotland (29%).

Economic Activity

1.2.15 The economic activity rate is a measure of the labour market opportunities available in the area³. The local area's level of economic activity (67.7%) is comparable with the wider area, wider region and Scotland (64.3%, 67.1% and 68.1% respectively).

1.2.16 Economic inactivity in the local area (32.3%) is lower than the wider area (35.7%), and comparable with both the wider region (32.9%) and Scotland (31.9%). Of economically active people, the employment profile is similar across the Study Area, with 8% of people self-employed within the local area, 8% in the wider area and 7% in the wider region.

1.2.17 Of economically inactive people, a higher proportion of people in the local area are retired (46%) compared to the wider area (30%), wider region (40%). The proportion of retired people within the local area is comparable with Scotland (also 46%).

Employment Structure

1.2.18 Human health and social work, public administration, defence & compulsory social security and wholesale & retail are the main sources of employment in the local area (comprising 40% of resident employment). This is slightly higher than the wider area and region (36% and 35% respectively) and in Scotland (36%). However, a smaller proportion of residents in the Study Area are employed in wholesale and retail compared to Scotland.

Skills and Qualifications

1.2.19 National Readership Survey (NRS) social grades area system of demographic classification widely used in market research⁴. Compared to the wider area, wider region and Scotland, the local area has a lower proportion of people in the highest social grades (AB). The Study Area generally has a slightly higher proportion of people (32%) in lowest social (DE) compared to the national average (27%).

1.2.20 The local area's educational attainment rate is generally comparable with the wider Study Area (i.e. the wider area and wider region) and Scotland levels, though a higher proportion of people have no qualifications compared to Scotland. Furthermore, a lesser proportion of residents in the local area have Level 4 qualifications or above (22%) compared to the wider area, wider region and Scotland (34%, 32% and 30% respectively).

³ The economic activity rate measures the percentage of the population, both in employment and unemployed that represents the labour supply regardless of their labour status. The figure represents the degree of success of the area in engaging people in productive activity.

⁴ Originally developed by the National Readership Survey (NRS). Now used by many other organisations for wider applications and a standard for market research.

Summary

1.2.21 The Socio-economic and Labour Market Study Area⁵ surrounding the Site is characterised by:

- An increasing population between 2001 and 2019 and to 2035;
- A comparable proportion of working age residents with the wider area, wider region and Scotland;
- A comparable economic activity and inactivity rate with Scotland;
- A lower proportion of people in highly skilled jobs locally compared to the wider area, wider region and Scotland and a higher proportion of people in semi-skilled/unskilled jobs compared to the wider area, wider region and Scotland;
- A lower proportion of people with Level 4 qualifications or above compared to the wider area, wider region and Scotland; and
- A higher proportion of residents have no qualifications compared to Scotland.

Key Business Sectors

Construction Sector

1.2.22 Across West Dunbartonshire, some 1,200 people were employed in the construction sector in 2019. In 2019, it was estimated that the gross value added (GVA) per construction worker was £47,358 and the gross wage/salary per construction worker was £12,573 within the local authority. There were approximately 304 construction businesses (units) operating throughout West Dunbartonshire in 2019.

Tourism Accommodation Sector

1.2.23 Within West Dunbartonshire, some 2,400 people were employed in the tourism and recreation sector⁶ in 2019. In the same year, it was estimated that the gross value added (GVA) per tourism and recreation worker was £15,752 and the gross wage/salary per worker was £23,958 within the local authority.

Tourism and Recreation

Economic Importance of Tourism

1.2.24 At the 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 opportunities⁷. The importance of tourism is demonstrated in its status as one of the Scottish Government's six Growth Sectors⁸.

1.2.25 The latest available figures show that sustainable tourism generated some £4.1 billion GVA in 2018. Of all overnight visits to Scotland in 2019, some 80% were made by UK residents

⁵ Defined as the area with a 45-minute drive time.

⁶ For the purpose of this chapter, the 'tourism and recreation' sector encompasses the accommodation and food services sectors.

⁷ Scottish Government (2015). Scotland's Economic Strategy. Available at: <https://www.gov.scot/publications/scotlands-economic-strategy/>

⁸ Scotland's Economic Strategy (2015). Page 42

(comprising 14.1 million trips), while the remaining 20% of overnight visits were from international visitors (comprising 3.5 million trips)⁹.

- 1.2.26 Whilst only 20% of trips in 2019 were made by international visitors, expenditure from this market totalled £2.5 billion, or 43% of total overnight spend in Scotland, making 2019 the best year in over a decade in terms of international tourist expenditure for both Scotland and the UK. 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.
- 1.2.27 In March 2020 the Scottish Tourism Alliance published ‘Scotland Outlook 2030’, a new tourism strategy focused on sustainable tourism. In 2019, the tourism sector generated approximately £12 billion of economic activity in the Scottish economy, contributing around £7 billion to Scottish GDP. This emphasises the critical role which tourism plays across several other sectors and industries across Scotland, including hospitality and transport.
- 1.2.28 However, the strategy also outlines a number of challenges to the continued success of the tourism sector, including changing travel patterns in light of the climate emergency as well as skills and staff shortages – heavily impacted by Brexit. Overall, the integral role that tourism continues to play in Scotland’s sustainable economic development provides positive opportunities for growth at a national, and community, level.
- 1.2.29 Tourism is identified as a key business sector by LLTNP within the National Park Partnership Plan (2018-2023) and Tourism Strategy (2012-2017). According to the latest STEAM research published in 2017¹⁰, tourism was estimated to generate £386 million within the local economy through visitor and tourism business expenditure (an increase of 13.5% on 2016). Indeed, the LLTNP National Park Partnership Plan sets a target to increase the overall value of the visitor economy (from the 2016 STEAM baseline) by £340 million over the lifetime of the plan.
- 1.2.30 In 2017, approximately 4.6 million people visited to the national park area (of which 2.1 million were day visitors – generating some £142 million for the economy of the park). Staying visitors account for just over half (53%) of all ‘visitor days’, which takes into account those visitors who stay at any destination for more than a day. Visitors to the park are vital to local businesses, supporting more than 6,799 Full Time Equivalent (FTE) jobs in 2017.

Economic Importance of Tourism: COVID-19

- 1.2.31 Since the onset of the COVID-19 pandemic, tourism has been one of the hardest hit industries in Scotland. Research published by Visit Scotland¹¹ in February 2022 indicates that the UK public are as likely to think the ‘worst had passed’ as the ‘worst is still to come in relation to COVID-19. Although this represents a more pessimistic position than throughout most of 2021, it is still more positive than December 2021 and significantly more positive than January 2021.
- 1.2.32 Research also suggests that ‘comfort levels’ with typical activities such as ‘going for a walk in a country park’ and ‘shopping in your local shopping centre’ are higher than at any point since May 2020, toward the beginning of the pandemic. As such, this would suggest that the public’s comfort and confidence in undertaking leisure activities has improved in recent months.

⁹ Visit Scotland (2019). Key Facts on Tourism in Scotland. Available online at: <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/key-facts-on-tourism-in-scotland-2019.pdf>

¹⁰ Global Tourism Solutions (2017). STEAM Tourism Economic Impacts Narrative Summary. Available online at: <https://www.lochlomond-trossachs.org/wp-content/uploads/2019/01/LLTNP-2017-Narrative.pdf>

¹¹ Visit Scotland (2022). COVID-19 UK Consumer Tracking Report: Scotland Level Summary. Available online at: <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/coronavirus-insights/uk-market/scotland-level-summary-waves-40-42-3-feb-2022.pdf>

- 1.2.33 Further, UK and Scottish residents anticipate taking significantly more overnight trips in the next 12 months, than the previous 12 months and domestic overnight trips continue to be preferred to trips overseas.

Characteristics and Assets

Visitor Attractions

- 1.2.34 The most recent Scotland Visitor Survey¹² carried out by Jump Research in 2015 and 2016 revealed that the main motivation among respondents to visit LLTNP was ‘the scenery and landscape’ (78%), followed by ‘to get away from it all’ (48%) and ‘holidayed here before and wanted to return’ (39%).
- 1.2.35 In terms of activities undertaken by visitors to LLTNP, the majority spent their time sightseeing by car, coach or on foot (69%). Further, 40% of visitors spent their time shopping and around 35% visited a visitor centre.
- 1.2.36 There are several heritage assets which attract visitors within the Tourism and Recreation Study Area, in particular Balloch Castle. Research indicates that around 43% of visitors to LLTNP visited a historic house, stately home or castle and an estimated 39% visited a country park or garden.
- 1.2.37 A visitor satisfaction survey undertaken by Visit Scotland in 2015 and 2016 indicates that of 84 respondents, 75% of visitors scored their overall experience 9 or 10 out of 10. Respondents were later asked how likely they would be to recommend the national park to friends and family, with 76% scoring 9 or 10 out of 10 on the scale (extremely unlikely (1) to extremely unlikely (10). With regard to visitor satisfaction with the value for money of attractions, 43% of participants scored this 9 or 10 out of 10, scoring an average of 8.1 out of 10. These figures indicate a strong likelihood that these visitors will return to the region.
- 1.2.38 The LLTNP Tourism Strategy (2012-2017) sets out the aspirations for the tourism sector to 2017, aiming to inform the future direction of the tourism sector and the targets/goals it seeks to achieve. The strategy aims to:
- “To deliver a high quality, authentic experience for visitors with many opportunities to appreciate and enjoy the natural and cultural heritage within an internationally renowned landscape that compares to the best on offer around the world”.*
- 1.2.39 The Tourism Strategy provides the tourism context for the National Park Partnership Plan (2018-2023) and is intrinsically linked to the LLTNP Outdoor Recreation Plan (2013-2017). Both the Tourism Strategy and Outdoor Recreation Plan are yet to be updated.
- 1.2.40 The rural setting and upland topography of the Tourism and Recreation Study Area affords 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.

Public Access

- 1.2.41 This assessment has identified all Core Paths and a range of other promoted recreational routes, including the John Muir Way, within the Public Access Study Area, and with visibility of the Proposed Development. The availability of informal areas of open space has also been

¹² Visit Scotland (2017). Scotland Visitor Survey 2015 & 2016. Regional Results: Loch Lomond and the Trossachs National Park. Available online at: <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/scotland-visitor-survey-loch-lomond-trossachs-national-park-2016.pdf>

recognised in accordance with the scoping opinion. The following receptors are relevant to this assessment:

Receptor
Principal Walking Routes / Long Distance Paths
John Muir Way
Three Lochs Way
Loch Lomond Shores Walk
Balloch Castle Country Park
Rights of Way
SD28
SD29
SD30
SD31
SD 44
SD45
SD46
SD47
SD 53
SD55
SD56
SD57
SD58
SD60
SD61
SD62
SD81
SD82
SD83
SD84
SD 95 (vindicated vehicular right of way)
SD 97
SD 99
SD 102
SD103
SD109
SD59 (Other route)
Heritage Path
Stoneyrollan Road
Core Path
Within site boundary
Outwith site boundary
Cycle Paths
National Cycle Route 7
West Loch Lomond Cycle Route (Regional Cycle Route 40)
Arden to Helensburgh
Informal Routes
Drumkinnon Bay Beach
Drumkinnon Bay Beach (North)
Drumkinnon Wood
Duncan Mills Memorial Slipway
River Leven Shoreline
Woodland East of Pier Road
Informal open access site areas
Woodbank House Parkland
Drumkinnon Bay Beach
Drumkinnon Bay Beach (North)
Drumkinnon Wood
Duncan Mills Memorial Slipway
Woodland East of Pier Road (including Leven Riverside)

Recreational Resource

- 1.2.42 **Chapter 11 – Landscape and Visual Impact** of this EIAR identifies a number of Landscape Character Types (LCT) which are also situated within the Tourism and Recreation Study Area, which support recreational activity. The following receptors have been identified which are of relevance to this assessment:
- View within Loch Lomond and the Trossachs National Park including the Loch, Inchmurrin Island and Ben Lomond;
 - LCT 263: View from Loch Lomond Shores;
 - LCT 264: Looking towards Inchmurrin Island from Loch Lomond Near Cameron House;
 - LCT 261: View North East from Three Lochs Way Near Upper Stoneyrollan; and
 - LCT 255: View North East from Three Lochs Way near Ben Bowie.
- 1.2.43 **Chapter 13 – Archaeology and Cultural Heritage** of this EIAR also identifies relevant heritage designations which are also situated within the Tourism and Recreation Study Area which pertain recreational value. However, there are no identified heritage receptors of relevance to this EIAR Chapter which have been assessed to have the potential to result in significant effects in EIA terms.

Statutory Protections

- 1.2.44 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 and access to Loch Lomond and Drumkinnon Bay.
- 1.2.45 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 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.

Indoor Tourist Destinations

- 1.2.46 Indoor tourist attractions are fewer across the National Park as a result of the focus on the stunning natural scenery and abundance of outdoor pursuits on offer. Two popular indoor destinations worth noting within the Tourism and Recreation Study Area include Loch Lomond Shores and the Sea Life Loch Lomond.
- 1.2.47 In 2017, the expenditure and activity of visitors to the National Park supported 1,058 Full-Time Equivalent (FTE) jobs in the food and drink sector and an estimated 708 FTE jobs in the retail / shopping sector.

Outdoor Tourist Destinations

- 1.2.48 Tourist attractions often utilise the scenic and landscape value of the region. In recent months, the overall attractiveness of outdoor tourist attractions has risen in light of the COVID-19 pandemic. Outdoor attractions have typically been less affected by pandemic related restrictions given their natural ventilation, resulting in higher visitor numbers.
- 1.2.49 The Site benefits from proximity to a number of natural assets that afford a variety of opportunities for outdoor recreational activities including walking, running, cycling and horse riding. Outdoor tourist attractions relevant to this assessment include:
- Loch Lomond Bird of Prey Centre;
 - Sweeney’s Cruises;
 - Maid of the Loch;
 - Steam Slipway;
 - TreeZone Aerial Adventure Course; and
 - Loch Lomond Seaplanes.
- 1.2.50 The value of scenery and landscape is further reflected in the activities undertaken by visitors who chose to visit LLTNP. The Scotland Visitor Survey (2015 and 2016) found that 78% of visitors to LLTNP were attracted by the scenery and landscape and 48% stated to get away from it all.
- 1.2.51 The top 10 activities undertaken by visitors to the National Park, included:

Table 14-2: Visit Scotland Visitor Survey 2015 to 2016 – Top 10 Activities Undertaken by Visitors

Respondents	%
Sightseeing by car / coach / on foot	69%
Short walk, stroll	59%
Visited a woodland / forest area	53%
Visited a historic house, stately home, castle	43%
Shopping	40%
Long walk, hike, ramble	40%
Visited a country park / garden	39%
Visited cities	39%
Visited a visitor / heritage centre	35%
Visited a cathedral, church, abbey, other religious building	33%

- 1.2.52 The TreeZone Aerial Adventure course near to Lomond Shores is one of two TreeZone locations in Scotland. Other popular outdoor events include the Loch Lomond Highland Games; Great Scottish Swim events; and Run Loch Lomond 10k and 5k Races.

Hospitality

- 1.2.53 Hospitality businesses, including those within hotels, are widespread across the Tourism and Recreation Study Area – with many located within Balloch village centre or along the route of the A82. In Balloch, these are mainly located around Lomond Shores and along Balloch Road.

Other hospitality businesses are located in small towns and villages throughout the Study Area. Key hospitality businesses of note within the Study Area are listed in **Section 6 – Receptor Sensitivity**.

- 1.2.54 The Visit Scotland Visitor Survey undertaken between 2015 and 2016 found that 28% of respondents scored LLTNP 9 or 10 out of 10 for satisfaction with value for money when eating out, scoring an average of 8.5 out of 10. With regard to satisfaction of availability of local produce when eating out, this scored an average of 7.7 out of 10. Hospitality businesses including those located within hotels are mostly located in the key settlements of Balloch, Alexandria and Luss.
- 1.2.55 Further, in 2017 the expenditure and activity of visitors to the National Park supported 1,058 FTE jobs in the food and drink sector – the second highest employment sector supported by tourism.
- 1.2.56 Key visitor hospitality businesses within the Study Area are listed in **Section 6 – Receptor Sensitivity**.

Visitor Accommodation

- 1.2.57 The economic contribution of the tourism sector is underpinned by visitor accommodation. In 2017, 27% of all visitors to the National Park stayed in the area for one or more nights and those staying in serviced accommodation (including hotels, guest houses, B&Bs and inns) represent the majority of visitors (19%).
- 1.2.58 On average in 2017 staying visitors spent an estimated £99.76 per day or £309.26 per visit to the National Park. Visitors staying in serviced accommodation typically spent £126.26 per day and £213.81 per visit and visitors staying in non-serviced accommodation (including self-catering properties as well as camping and caravanning accommodation) on average spent £84.22 per day and £555.82 per visit.
- 1.2.59 Staying visitors generate a total economic impact of £244 million for businesses throughout the National Park. In 2017, the expenditure and activity of visitors to LLTNP supported 1,999 FTE jobs in the accommodation sector, the largest employment sector supported by tourism.
- 1.2.60 The Visit Scotland Visitor Survey carried out between 2015 and 2016 found that when testing visitor satisfaction of value for money for accommodation, 49% scored 9 or 10 out of 10 – with an average score of 8 out of 10. When asked if they were satisfied with the service provided by staff at the accommodation, 54% scored 9 or 10 out of 10, with an average score of 8.4 out of 10.
- 1.2.61 When asked if they were satisfied with the knowledge of staff at the accommodation about things to do in the local area, 49% scored 9 or 10 out of 10, with an average score of 8.4 out of 10. When asked about their satisfaction with availability of free WIFI at the accommodation, 28% scored 9 or 10 out of 10, with an average score of 6.8 out of 10.
- 1.2.62 Key visitor accommodation businesses within the Study Area are listed in **Section 6 – Receptor Sensitivity**.

Recreational Activities in the Open Countryside

- 1.2.63 There are many popular recreational activities within the woodlands, forests, countryside and Lochside coastline of the National Park including walking, running, cycling, mountain biking, fishing, canoeing, kayaking and swimming. Of particular importance, Loch Lomond spans an area of 27.5 sq. miles from Balloch in the south to Ardlui in the north and affords opportunities to enjoy the outdoors. Local heritage assets such as Balloch Castle and Country Park provide opportunities to enjoy the cultural heritage of the area, representing locally popular recreational and access routes.

- 1.2.64 In addition to walking and heritage-based tourism, golf tourism is also important to LLTNP. There are a number of golf clubs in the Tourism and Recreation Study Area including Vale of Leven Golf Club, Carrick Golf Course and “The Wee Demon” Golf course. These golf clubs also play a key role for visitors, providing bars and restaurants before, during and after golf.
- 1.2.65 According to the Scotland Golf Visitor Survey published in 2016¹³, on average, each day-trip visitor from Scotland spent £65 on their golf trip (including golf, travel, food and drink, purchases etc.). Overnight visitors tended to spend on average £320 per person per night however this overall average includes overseas visitors on a package trip. Therefore, the average spend for all overnight visitors, excluding those on a package trip was £245 per person per night. Visitors from overseas tended to spend the most, averaging £338 per night – with those visiting from North America spending considerably more (£405 per night) than those visiting from Europe (£257 per night).

Tourists Travelling (By Road) Through the Open Countryside

- 1.2.66 Travelling to, from or between tourist destinations, recreational activities, hospitality or visitor accommodation itself forms part of the overall tourism experience. Tourists may select accommodation or destinations depending on their accessibility, among many other factors, and any potential disruption to journeys may detract from their enjoyment of the visitor experience. Key routes of note include:
- A82;
 - A811;
 - Old Luss Road;
 - Balloch Road;
 - National Cycle Route 7;
 - West Loch Lomond Cycle Route (Regional Route 40); and
 - Other minor roads.

Receptor Sensitivity

- 1.2.67 The key components of the tourism and recreation sector can be categorised into six broad groupings:
- Indoor tourist destinations;
 - Outdoor tourist destinations;
 - Hospitality;
 - Visitor accommodation;
 - Recreational activities in the open countryside; and
 - Tourists travelling (by road) though the open countryside.

¹³ Progressive (2016). Visit Scotland / Scottish Enterprise Scotland Golf Visitor Survey 2016. Final Report. Available online at: <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/golf-visitor-survey-2016.pdf>

- 1.2.68 The visitor attractiveness and tourism potential of each of the six receptor groupings including public access could be affected by environmental, socio-economic, tourism and recreation or public access 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 there been considered in the tourism and recreation assessment of the Proposed Development.
- 1.2.69 In relation to the assessment of 'primary' effects on recreational and public 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).
- 1.2.70 In relation to the assessment of wider 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 to visitor attractiveness of such assets, ultimately resulting in changes to visitor numbers and tourist expenditure.
- 1.2.71 This captures the elasticity of demand of each receptor grouping and the key question to underpin the identification of receptor sensitivity was therefore: *"Taking account of any embedded mitigation, 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.
- 1.2.72 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.
- 1.2.73 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 resulting in changes to visitor numbers and expenditure, the sensitivity of each receptor grouping is identified in **Table 14-3** below.

Table 14-3 Detailed Summary of Receptor Sensitivity

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
Labour Market					
Labour Market	-	Changes in employment	The socio-economic profile indicates the labour market has a readily available supply of appropriate labour. It is unlikely the Proposed Development would lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages).	Low	Construction and Operation

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
Key Business Sectors					
Construction	Minor beneficial effect Creation of jobs during the construction phase: <ul style="list-style-type: none"> ▪ 366 short term construction jobs; and ▪ 182 net additional short-term jobs in the Wider Region. 	Changes in sectoral activity and performance	Low / Moderate (Beneficial) effect, that is not significant. The effects of the development only are important at a local scale	Low	Construction
Tourism and Recreation	Moderate beneficial effect Creation of jobs during the construction phase: <ul style="list-style-type: none"> ▪ 33 gross operational FTEs; and ▪ 4 net additional operational FTEs. 		Moderate long-term effects for the local and wider study area	Medium	Operation
Public Access					
Principal Walking Routes	John Muir Way	Availability of access during construction and operation phases	Long-distance walking trails, are recognised in policy terms at the national level (e.g. 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.	High	Construction and Operation
	Three Lochs Way			High	Construction and Operation
	Loch Lomond Shores Walk			Low	Construction and Operation
	Balloch Castle Country Park			Low	Construction and Operation
Rights of Way	SD28		These routes are of local importance.	Low	Construction and Operation
	SD29		It is important to note that there is no definitive record of rights of way in	Low	Construction and Operation

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
	SD30		Scotland and most are not signposted or 'advertised'.	Low	Construction and Operation
	SD31			Low	Construction and Operation
	SD44			Low	Construction and Operation
	SD45			Low	Construction and Operation
	SD46			Low	Construction and Operation
	SD47			Low	Construction and Operation
	SD53			Low	Construction and Operation
	SD55			Low	Construction and Operation
	SD56			Low	Construction and Operation
	SD57			Low	Construction and Operation
	SD60			Low	Construction and Operation
	SD81			Low	Construction and Operation
	SD82			Low	Construction and Operation
	SD83			Low	Construction and Operation

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
	SD84			Low	Construction and Operation
	SD97			Low	Construction and Operation
	SD99			Low	Construction and Operation
	SD103			Low	Construction and Operation
	SD58			Low	Construction and Operation
	SD61			Low	Construction and Operation
	SD62			Low	Construction and Operation
	SD102			Low	Construction and Operation
	SD95 (vindicated vehicular right of way)			Low	Construction and Operation
	SD109			Low	Construction and Operation
	SD59 (Other route)			Low	Construction and Operation
Heritage Path	Stonemollan Road		This route is of local importance.	Low	Construction and Operation
Core Paths	Within site boundary		These routes are of local importance and are afforded protection under the Land Reform (Scotland) Act 2003.	Medium	Construction and Operation
	Outwith site boundary		Some Core Paths are not necessarily 'advertised' or signposted unless it forms part of a more significant	Medium	Construction and Operation

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
			route (such as the John Muir Way).		
Cycle Paths	National Cycle Route 7		This cycling route is of national importance.	High	Construction and Operation
	West Loch Lomond Cycle Route (Regional Cycle Route 40)		This cycling route is of regional importance.	Medium	Construction and Operation
	Arden to Helensburgh		This cycling route is of local importance.	Low	Construction and Operation
Informal Open Access Site Areas	Woodbank House Parkland		These informal open access site areas enable access to a range of visitor attractions and inherently provide opportunities for recreational activities such as walking, cycling and horse riding.	Low	Construction and Operation
	Drumkinnon Bay Beach			High	Construction and Operation
	Drumkinnon Bay Beach (North)			Medium	Construction and Operation
	Drumkinnon Wood		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.	Medium	Construction and Operation
	Duncan Mills Slipway			Medium	Construction and Operation
	Woodland East of Pier Road (including Leven Riverside)			Medium	Construction and Operation
			Woodbank House Parkland has Low sensitivity due to low levels of use by casual dog walkers and occurrences of antisocial behaviour. Local publicly accessible alternatives available including Drumkinnon Wood and Balloch Castle Country Park.		
			Woodland East of Pier Road (including Leven Riverside) has medium sensitivity due to local importance and popularity but alternatives offering similar experience are		

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
			<p>available nearby (e.g. Balloch Castle Country Park).</p> <p>Drumkinnon Bay Beaches have a High sensitivity due to intensity of use and limited publicly accessible alternatives.</p> <p>Drumkinnon Wood has Medium sensitivity due to local importance as a public walking route and recreational popularity but alternatives offering similar access and experience are available nearby.</p> <p>Duncan Mills Slipway has Medium sensitivity due to its local importance, recreational value and use as a launch/retrieval point into the Loch for water craft.</p>		
Tourism, Recreation					
Indoor tourist destinations	Loch Lomond Shores Sealife Loch Lomond	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	<p>These destinations form a core part of the tourism and recreation offering (i.e. these receptors are established attractions which tourists choose to visit).</p> <p>The importance and type of destination varies among receptors (e.g. retail, leisure or other uses).</p> <p>As these attractions are experienced indoors and focused on the quality of the tourism offering, effects relating to landscape and visual setting are not likely to catalyse a major change in overall visitor attractiveness, overall visitor numbers and associated expenditure</p>	Medium	Construction and Operation

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
			across the Tourism and Recreation Study Area.		
Outdoor tourist attractions	Loch Lomond Bird of Prey Centre Sweeney's Cruises Maid of the Loch Steam Slipway TreeZone Aerial Adventure Course Loch Lomond Sea Planes	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. these receptors are established attractions which tourists choose to visit owing to their special features of 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 visitor attractiveness of an individual destination is not in itself likely to catalyse a major change in overall visitor numbers and associated expenditure across the Tourism and Recreation Study Area.	Medium	Construction and Operation
Hospitality	Key hospitality businesses of note within the Tourism and Recreation Study Area: Cameron House Duck Bay Hotel and Restaurant The Cruin The Coachhouse Cucina Glenfern Guest House	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Similar to indoor tourist attractions, bars and restaurants are likely to be largely experienced indoors and focused on the quality of the hospitality offering. Further, receptors with an attractive landscape and visual 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 receptor is not likely to catalyse a major change in overall visitor numbers	Medium	Construction and Operation

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
	<p>The Princess Rose</p> <p>Fruin Farm</p> <p>Inchmurrin Island Hotel and Restaurant</p> <p>The Riverside Bar and Restaurant</p> <p>It is noted that many of the visitor accommodation receptors listed below will contain hospitality businesses forming a key reason for non-residents choosing to visit.</p>		<p>and associated spend across the Tourism and Recreation Study Area.</p>		
Visitor accommodation	<p>Key visitor accommodation businesses of note within the Tourism and Recreation Study Area:</p> <p>Balloch House Hotel</p> <p>Drumkinnon Holiday Cottages</p> <p>Lomond Woods Holiday Park</p> <p>Portnellan Farm</p> <p>Lornhill Cottages</p> <p>Ardoch Cottage</p> <p>Garden Cottage</p> <p>Ardoch Loch Lomond</p> <p>Vale View</p> <p>Four Seasons Campers</p>	<p>Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)</p>	<p>As with outdoor tourist destinations, visitor accommodation (such as hotels, guest houses, B&Bs and campsites) form a core offering of the tourism and recreation sector (i.e. tourists often stay in short term accommodation to visit local destinations or simply relax by making use of on-site amenities).</p> <p>As with hospitality receptors, visitor accommodation is likely to be largely experienced indoors and focused on the quality of the accommodation (and associated facilities). However, receptors with an attractive landscape setting may use this to differentiate themselves from competitors.</p>	Medium	Construction and Operation

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
	Alba B&B and Self Catering Accommodation Blairhosh Cottage Dumbain Farm Woodvale B&B Gowanlea Guest House Sheildaig Farm B&B Waterhouse Inn Sunnyside B&B				
Recreational activities in the open countryside	Balloch Castle and Country Park Carrick Golf Course “The Wee Demon” Golf Course Loch Lomond Pony Trekking River Leven Loch Lomond Vale of Leven & District Angling Club In your element bike & boat hire Drumchapel and Clydebank Kayak Club Balloch Cruising Club Sandbar Cruising Club	Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)	Similar to designated routes and outdoor tourist attractions, areas of open countryside (both land and water) form a central part of the core offering of the tourism and recreation sector as they provide outdoor opportunities for undertaking 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 surrounding landscape and an attractive landscape setting may contribute to experiential value. Owing to the heterogamous nature of recreational activities and	Medium	Construction and Operation

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
	<p>Slipway Cruising Club</p> <p>Events: Loch Lomond Highland Games</p> <p>Great Scottish Swim</p> <p>Run Loch Lomond 10k and 5k</p> <p>Beaches: Drumkinnon Bay Beach</p> <p>Drumkinnon Bay Beach (North)</p> <p>River Leven Shoreline</p> <p>Woodlands: Drumkinnon Wood Woodland East of Pier Road</p> <p>Duncan Mills Memorial Slipway</p>		<p>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.</p>		
<p>Tourists travelling (by road) in the open countryside</p>	<p>A82</p> <p>A811</p> <p>Old Luss Road</p> <p>Balloch Road</p> <p>Other minor roads</p>	<p>Changes in visitor attractiveness and tourism potential (visitor numbers and expenditure)</p>	<p>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 tourist experience.</p> <p>Changes in visual amenity would only be experienced momentarily throughout a journey and are thus less likely to</p>	<p>Medium</p>	<p>Construction and Operation</p>

Sensitivity of Tourism, Recreation and Public Access Receptors	Detailed Receptors (where applicable)	Type of Effect	Rationale	Sensitivity	Phase of Likely Effect(s)
			<p>detract from the overall tourist experience.</p> <p>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.</p>		

Summary of Receptor Sensitivity

1.2.74 **Table 14-4** below summarises the sensitivity of socio-economic, tourism, recreation and public access receptors likely to experience effects from the Proposed Development and therefore require to be considered within the impact assessment presented in **Chapter 14 – Socio-economics, Tourism, Recreation and Public Access** of the EIAR.

Table 14-4: Summary of Receptor Sensitivity

Receptor	Type of Effect	Sensitivity	Phase of Likely Effect(s)
Labour Market			
Labour Market	Changes in employment	Low	Construction and Operation
Key Business Sectors			
Construction	Changes in sectoral activity and performance	Low	Construction
Tourism and Recreation		Medium	Operation
Public Access			
Principal Walking Routes			
John Muir Way	Availability of access during construction and operation phases	High	Construction and operation
Three Lochs Way		High	Construction and operation
Loch Lomond Shores Walk		Low	Construction and operation
Balloch Castle Country Park		Low	Construction and operation
Rights of Way			
SD28		Low	Construction and operation

Receptor	Type of Effect	Sensitivity	Phase of Likely Effect(s)
SD29	Availability of access during construction and operation phases	Low	Construction and operation
SD30		Low	Construction and operation
SD31		Low	Construction and operation
SD44		Low	Construction and operation
SD45		Low	Construction and operation
SD46		Low	Construction and operation
SD47		Low	Construction and operation
SD53		Low	Construction and operation
SD55		Low	Construction and operation
SD56		Low	Construction and operation
SD57		Low	Construction and operation
SD60		Low	Construction and operation
SD81		Low	Construction and operation
SD82		Low	Construction and operation
SD83		Low	Construction and operation
SD84		Low	Construction and operation
SD97		Low	Construction and operation
SD99		Low	Construction and operation
SD103		Low	Construction and operation
SD58		Low	Construction and operation
SD61		Low	Construction and operation
SD62		Low	Construction and operation
SD102		Low	Construction and operation
SD95 (vindicated vehicular right of way)		Low	Construction and operation
SD109	Low	Construction and operation	
SD59 (Other route)	Low	Construction and operation	
Heritage Path			
Stonemollan Road	Availability of access during construction and operation phases	Low	Construction and operation
Core Paths			
Within site boundary		Medium	Construction and operation

Receptor	Type of Effect	Sensitivity	Phase of Likely Effect(s)
Outwith site boundary	Availability of access during construction and operation phases	Medium	Construction and operation
Cycle Paths			
National Cycle Route 7	Availability of access during construction and operation phases	High	Construction and operation
West Loch Lomond Cycle Route (Regional Cycle Route 40)		Medium	Construction and operation
Arden to Helensburgh		Low	Construction and operation
Informal Open Access Site Areas			
Woodbank House Parkland	Availability of access during construction and operation phases	Low	Construction and operation
Drumkinnon Bay Beach		High	Construction and operation
Drumkinnon Bay Beach (North)		Medium	Construction and operation
Drumkinnon Wood		Medium	Construction and operation
Duncan Mills Slipway		Medium	Construction and operation
Woodland East of Pier Road (including Leven Riverside)		Medium	Construction and operation
Tourism, Recreation			
Indoor tourist destinations		Medium	Construction and Operation
Outdoor tourist attractions		Medium	Construction and operation
Hospitality		Medium	Construction and operation
Visitor accommodation		Medium	Construction and operation
Recreational activities in the open countryside		Medium	Construction and operation
Tourists travelling (by road) in the open countryside		Medium	Construction and operation