WHITE PAPER

# The Aesthetic Footprint

## NC500 digital demand, infrastructure strain and the Highland Visitor Levy

Evidence for the Highland Council statutory Visitor Levy consultation (7 September to late November 2026), drawing on a 60,546-post Instagram analysis, the 2026 BiGGAR Economics resident survey, and comparator routes including the Wild Atlantic Way.

**58,140**
#NC500 posts analysed after de-duplication and spam removal

**14–31%**
of posts name campervan / motorhome travel, the dominant mode

**+83%**
traffic growth on the route, 2014–2025 (BiGGAR, 2026)

**~£9m**
estimated annual levy revenue; none collectable before mid-2028

**Michael O'Regan, PhD**

8 October 2026

*Combines the findings of a 58,140-post #NC500 Instagram analysis with the legal framework for the levy, resident survey evidence and international comparators.*

*Cover photograph: the NC500 looking west from Glen Docharty towards Kinlochewe, Wester Ross. Photo: John Young / Unsplash.* unsplash.com/photos/G1O0euqP3L8

**The Aesthetic Footprint: NC500 digital demand, infrastructure strain and the Highland Visitor Levy**

White paper. First published 8 October 2026.

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This paper is written in a personal capacity. The views expressed are the author's own. They do not represent the views or policy of Glasgow Caledonian University or any other organisation, and the paper has not been peer reviewed.

The social media figures come from scripts written in the Python programming language and run on a sample of public Instagram posts. They describe that sample, not all visitors to the route. Interpretations drawn from them are estimates, and the key ones carry a confidence rating; section 10 sets out the limits. Figures from other sources are reported as those sources published them.

The paper is provided for information and to inform public consultation. It is not legal, financial or professional advice. Readers should check the primary sources before relying on any figure, and the author accepts no liability for decisions made on the basis of this paper.

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**HOW TO READ THIS PAPER**

- Key claims carry a confidence rating: **High** (directly measured or quoted from a primary source), **Moderate** (indirect measure, secondary reporting, or a correlation), **Low / Unknown** (not established).
- Instagram percentages are produced by strict keyword matching and are **minimum estimates**.
- Source links are embedded in the text; full literal URLs are listed in section 12.
- Shaded quotations (Q1–Q14) are **verbatim extracts from public Instagram posts by individual visitors**. They illustrate themes and are not representative; each is referenced in section 12.

# Executive summary

This paper asks whether Highland Council's proposed Visitor Levy matches where pressure on the North Coast 500 (NC500) falls. It finds that online attention and resident-reported strain concentrate in the north-west of the route. Campervans and motorhomes are the most visible travel mode, and the levy as proposed does not reach them when they park overnight off-site.

The table below separates what is measured from what is inferred.

| # | Finding | Evidence | Confidence |
|---|---|---|---|
| 1 | Campervan / motorhome is the dominant named travel mode, matching the BiGGAR survey finding that about a third of travellers use one: 14.0% of posts (strict), 24.9–31.0% (broad), about double walking and 2.1 to 2.6 times car. | Instagram + BiGGAR, section 3 | High |
| 2 | Attention concentrates in the north-west quarter and Wester Ross (Durness 3.3%, Ullapool 3.2%, Assynt 3.0%, Applecross 2.4%); remote detours (Cape Wrath, Sandwood Bay) draw <0.2%. | Instagram, section 4 | High |
| 3 | The same corridor carries documented physical strain: +83% traffic since 2014; 79% of residents report detrimental congestion daily or often; 85% see litter and just over half see human waste daily or often. | BiGGAR 2026 report, section 5 | High |
| 4 | Visitors rarely complain about congestion online: 66.7% of posts are positive; weather drives 12.9% of negative posts; traffic, parking and crowding are each under 2%. Asked directly, about 2 in 5 visitors said congestion spoilt their enjoyment. | Instagram + BiGGAR, section 5 | High |
| 5 | The proposed levy prices fixed accommodation (£5 hotel / £2 campsite) but does not reach campervans parked off-site, the mode the data shows is dominant. | Legislation + Council, section 6 | High |
| 6 | Half of net levy proceeds (≈£4.5m/yr on the Council's ~£9m estimate) is proposed for visitor management, infrastructure and services; collection cannot begin before ~mid-2028. | Highland Council, section 6 | High |
| 7 | Trip lengths cluster at the two ends: 45.7% of measurable trips ≤3 days, 32.0% ≥8 days, 14.8% in the 5–7-day guide window. | Instagram (indirect), section 8 | Moderate |
| 8 | #NC500 is predominantly a business tag: only 22% of posts come from accounts posting ≤3 times. | Instagram, section 2 | High (share) / Moderate (business label) |
| 9 | Comparator routes (Wild Atlantic Way, Iceland, New Zealand, Loch Lomond, Norway) have all had to regulate or charge for touring-vehicle overnighting separately. Norway's new accommodation levy, like Highland's, does not reach visitors' own motorhomes. | Section 7 | Moderate |

*Row 5 (highlighted) is the paper's principal policy finding.*

**Recommendations in brief**

1. Name the Durness, Ullapool and Assynt corridor and the Applecross and Bealach na Bà area as priority areas, each with a minimum share of the visitor-management budget.
2. Extend the Highland Campervan and Motorhome Scheme to Assynt / Lochinver and Applecross, and take legal advice on charging for overnight vehicle parking at the busiest sites.
3. Run procurement, land agreements and ranger recruitment in parallel with the 18-month clock, prioritising the revenue lines the Rural Tourism Infrastructure Fund cannot fund (rangers, toilet servicing, waste collection).
4. Build low-cost serviced overnight stops for motorhomes (aires) near the busiest sites.
5. Conduct road analysis and resident survey annually, and judge success by falling concentration at the five busiest north-west locations.

6. Tie NC500 and VisitScotland joint marketing to promoting at least one less-visited location per campaign.

## Limitations of Paper

Stated first, because the recommendations only stand if they survive it.

- **Causation is not established.** Geotag density and resident complaint coincide geographically, but the north-west is also the most scenic and road-constrained stretch. Instagram may reflect pre-existing demand rather than create it.
- **Payer–pressure mismatch.** The documented harms (verge damage, waste, fires, congestion) are most associated in the evidence with touring vehicles and wild camping, yet the levy is charged per room on fixed accommodation. A hotel guest in Inverness pays £5 a night; a campervan parked on a Durness verge pays nothing. Allocating levy revenue to the north-west partly cross-subsidises the highest-impact segment from the lowest-impact one.
- **Seasonality of the proof.** The strongest site-level evidence (Ceannabeinne, Durness) dates from 2022; the Instagram sample ends February 2024.
- **Not unique to the NC500.** Highland Council ranger data for 2025, cited by BiGGAR, show similar problems elsewhere in the Highlands, in some places worse than on the route.
- The above limitations lower confidence in mechanism but not in location. The pressure is where it is, whatever the cause. The second is treated as a design flaw to be corrected (Recommendation 2), not a reason to oppose the levy. The third is addressed by the monitoring recommendation.

# 1. Introduction: what the evidence can and cannot show

Highland Council is consulting on a tiered Visitor Levy from 7 September to late November 2026, and Full Council decides on 10 December 2026. This paper is written for that consultation. It combines an analysis of 58,140 public #NC500 Instagram posts with surveys of residents, visitors and businesses published by BiGGAR Economics in May 2026, and compares the proposal with measures on other scenic routes. This section sets out what each source can and cannot show.

The Instagram dataset measures **digital demand and aesthetic framing**: where attention concentrates, how the trip is narrated, who is posting. It does not measure road capacity, passing-place counts, toilet provision or verge condition. Geotag density is not evidence of physical strain, and this paper does not treat it as such. Short quotations from public posts by individual visitors illustrate the themes; they are not evidence of prevalence (section 12).

Physical-strain claims are sourced separately, chiefly to BiGGAR Economics' impact assessment for North Coast 500 Ltd, Building a Sustainable Future for the North Coast 500 (May 2026). It draws on online surveys of 828 residents, 617 visitors and 99 businesses carried out in late 2025, plus Department for Transport traffic counts and Highland Council ranger data. The report was commissioned by North Coast 500 Ltd. Press coverage (The Scotsman and the Press and Journal, 2 June 2026) and Highland Council's own consultation notice are used alongside it.

**DATA NOTES**

- The core dataset is 58,140 posts, of which 58.1% carry an Instagram location tag. Place matching also uses caption text.
- Transport-mode keyword sets are multi-label: one post can name more than one mode. The largest overlaps are campervan and walking (1.5%), car and campervan (1.1%), and car and walking (0.8%).
- Levy revenue is taken as approximately £9 million, the figure in Highland Council's consultation notice.
- 78% of posts come from accounts posting four or more times. Inspection of the top accounts shows these are mostly businesses, but that label is an inference.

# 2. The dataset

The analysis uses an Apify Instagram Hashtag Scraper export for #NC500 (scraped 16 February 2024), processed with a fully scripted Python/pandas pipeline. Sentiment is scored with VADER (Valence Aware Dictionary and sEntiment Reasoner), a rule-based tool that gives each caption a compound score from −1 (most negative) to +1 (most positive). The methodology is set out in Appendix A.

| Dataset tier | Posts | Definition and use |
|---|---|---|
| Full (after de-duplication) | 60,546 | All unique posts; 2 duplicate post IDs removed |
| Core | 58,140 | Full minus 2,406 posts (4.0%) from two Aberdeenshire antiques shops adding #nc500 to furniture listings ~110–150 km off-route. Used for volume, theme, route and sentiment statistics |
| Likely-traveller subset | 12,782 | Core posts from accounts posting ≤3 times (8,796 accounts; 22.0% of core). Used for visitor-behaviour statistics. A documented judgement call, not ground truth |

*Table 1. Dataset tiers. Recency: 2022 (14,239 posts) + 2023 (43,622) + Jan–Feb 2024 (2,649) = 99.9%; only 36 posts predate 2022.*

## Account base

**11,957** unique accounts contribute to the core dataset; only **49%** post exactly once. The highest-volume accounts (spam excluded) are overwhelmingly commercial or curatorial: an account that reposts other people's photographs (*your_scotland*, 922 posts), the official *northcoast500* account (385), the Highland Food and Drink Trail, camper-hire firms, tour operators, glamping and pod accommodation, cafés and photographers.

**Post format:** 59.9% single image, 39.6% carousel, 0.5% video (Reels are largely absent from this scrape method). **Engagement:** median 19 likes and 1 comment; mean 93 likes, pulled up by a few very popular posts (maximum 227,159 likes on one post).

**Disclosed sponsorship is negligible:** 19 posts (0.03%) carry #ad or #gifted; #sponsored and #partner do not occur. The commercial character of #NC500 comes from ordinary undisclosed business marketing, not paid partnerships.

# 3. Travel mode, accommodation and content

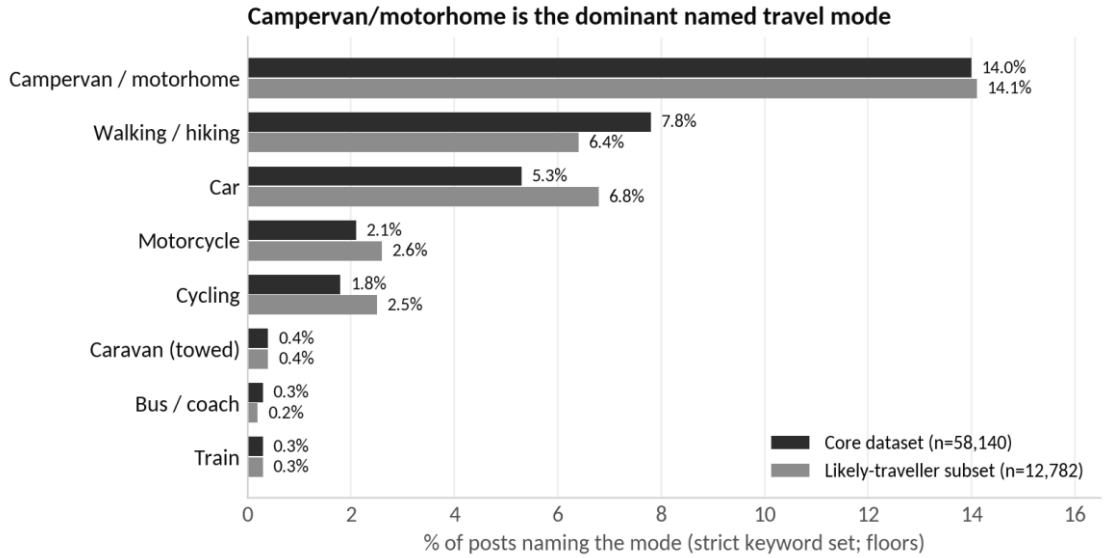



**Figure 1.** Named travel mode, core dataset vs. likely-traveller subset.

Source: #NC500 Instagram dataset (Instagram analysis, section 4). Strict keyword lists; a post can name more than one mode; figures are minimum estimates.

Campervan and motorhome travel is the strongest travel-mode signal in the dataset. On a strict definition, 14.0% of core posts and 14.1% of traveller posts name it, about double walking/hiking (6.4–7.8%) and 2.1 to 2.6 times explicit car mentions (5.3–6.8%). A broader keyword set including ‘van life’ and motorhome-hire marketing lifts the figure to **24.9% of traveller posts and 31.0% of core posts**; the gap is camper-hire firms’ own marketing volume.




**Plate 1.** A motorhome leading a line of vehicles on a rural road in Scotland.

Linked to section 3 and finding 1 of the executive summary: campervan / motorhome is the dominant named travel mode (14.0% of core posts on the strict definition, up to 31.0% on the broad one). The photographer gives the location only as "Scotland, UK"; the road is not identified, so the image is illustrative rather than site evidence. *Photo: Peyman Shojaei / Unsplash.* unsplash.com/photos/fvkKYJW6W94

The mode is also distinctively framed as identity. **62%** of campervan posts carry a lifestyle hashtag (principally #vanlife), against 5–23% for every other mode, while all modes tag their location at a similar 94–99% rate. Supporting hashtag counts: #roadtrip 7,353; #vanlife 4,606; #campervan 3,165.

**The framing is often visual as well as lifestyle-led.** One camper-van traveller described the whole trip in terms of what they wanted to photograph and the freedom it represented:

> **VISITOR VOICE · THE TRIP AS AN IMAGE**
> *"this summer [name omitted] & I did a big uk road trip in the camper & almost everywhere I looked I wanted to photograph it! I have really been loving landscapes and feel so connected to a lot of the images I took on this trip! to me they represent the feeling of freedom I've felt this summer, doing and seeing things I've always dreamt of."*
> — **@elliesimages**, Instagram post, 20 September 2023. **Q1**

**Independent check.** BiGGAR's 2025 visitor survey found that around a third of people travelling the NC500 use a campervan or motorhome. That is close to the broad Instagram figure (24.9% of traveller posts, 31.0% of core posts), from a different method and a different group of people.

**How visitors heard about the route.** In the same survey, word of mouth was the most common source (31%). Social media accounted for 26%: 19% through general social media and 7% through North Coast 500 Ltd's own channels. A further 12% found the route through the NC500 website. Social media is therefore a large channel, but not the main one.

## Where visitors say they sleep

The accommodation signal matters directly for levy design, because the levy is charged on accommodation.

| Accommodation / vehicle signal | Traveller subset | Core dataset |
|---|---|---|
| Campervan / motorhome / van-life (broad) | 24.9% | 31.0% |
| Campsite / wild camping | 7.7% | 8.2% |
| Hotel / B&B / glamping / cottage / hostel | 2.9% | 5.7% |
| Roof-tent / car-camping | 0.6% | 0.4% |
| Touring caravan (towed) | 0.3% | 0.2% |

*Table 2. Source: Instagram analysis, section 4. Core 'hotel' figure is inflated by hospitality businesses advertising rooms; the traveller-subset figure is the better visitor measure.*

Among likely travellers, **camping and campervan references outnumber fixed-roof accommodation references by roughly 2.7:1 (campsite/wild camping, 7.7% vs 2.9%) to 8.6:1 (campervan, broad definition)**. The dataset cannot separate formal campsites from wild camping, so the share that would fall inside the £2 levy tier is **Unknown**.

# What the posts are about

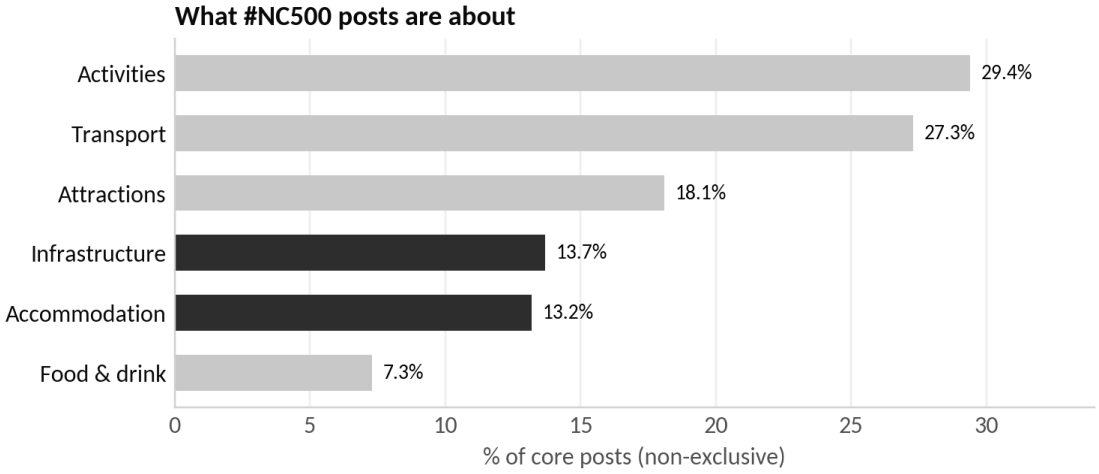



**Figure 2.** Content categories, core dataset (non-exclusive).

Source: Instagram analysis, section 5. Infrastructure and accommodation (highlighted) often appear together: 65% of accommodation posts mention infrastructure, 62% the reverse.

58% of infrastructure posts mention transport; 51% of transport posts mention activities; food and drink posts rarely mention another category (2% or fewer). The most common combination is **the drive + landscape + outdoor activity**.

| Theme | Traveller % | Core % |
|---|---|---|
| Activity / adventure | 28.5% | 29.4% |
| Road trip / driving | 26.8% | 22.4% |
| Landscape / scenery | 20.6% | 21.8% |
| Beach / coastline | 7.5% | 7.8% |
| Wildlife | 6.1% | 6.1% |
| History / culture | 4.9% | 5.2% |
| Food & drink | 4.1% | 7.3% |

*Table 3. Themes. Source: Instagram analysis, section 6. A large Scotland-photography hashtag cluster (#scotland_greatshots, #scotlandisnow, #hiddenscotland; #photography 3,486, #landscapephotography 2,817) indicates a meaningful share of posts come from the landscape-photography community rather than trip diaries.*

# 4. Where attention concentrates: the honeypot effect

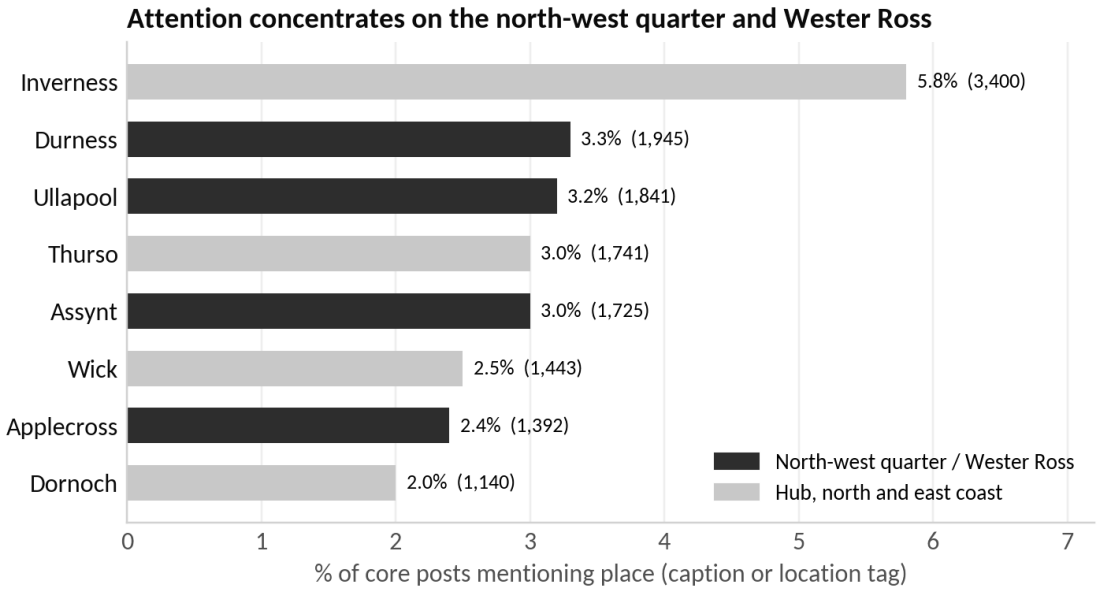



**Figure 3.** Top matched NC500 places, share of core posts (mention count in brackets).

Source: Instagram analysis, section 3; a list of 44 named places, matched as whole words in the caption and location tag. Torridon, Kylesku, Brora, Gairloch, Lairg, Achmelvich and Lochinver each 1.4–1.6% (790–950 posts).

Inverness aside (the start/finish hub, 5.8%), the north-west quarter (Durness, Ullapool, Assynt) and Wester Ross (Applecross, the Bealach na Bà pass, Torridon) draw disproportionate attention relative to the flatter east coast. **Cape Wrath and Sandwood Bay, the hardest-to-reach detours, are each mentioned by under 0.2% of posts.** Attention does not distribute across accessible geography; it collapses onto a handful of easy-to-reach, easy-to-photograph pinch points. Tourism planners call these ‘honeypots’.



**Plate 2.** Visitors walking into Smoo Cave, Durness.

Linked to section 4: attention collapses onto a few easy-to-reach, easy-to-photograph stops. Smoo Cave is also one of the four lowest-sentiment places with 100 or more posts (mean sentiment score 0.38 to 0.41). *Photo: Sebastian Herrmann / Unsplash.* unsplash.com/photos/YJtq8u8QUMg

**ROUTE VALIDATION**

- A limited check. 11 named attractions were compared with a simplified NC500 route line drawn through about 38 town-level points: Kylesku Bridge, Bealach na Bà, Dunrobin Castle, Achmelvich Bay, Eilean Donan Castle, Dunnet Head, Dornoch Beach, Duncansby Stacks, Castle Sinclair Girnigoe, Wailing Widow Falls, Ardvreck Castle. Five of them (Bealach na Bà, Dunrobin Castle, Achmelvich Bay, Eilean Donan Castle, Dunnet Head) are among the 38 points themselves, and two more (Kylesku Bridge, Dornoch Beach) lie within 1 km of one, so they sit on the line by construction. The four attractions independent of the line were 2.6 km (Castle Sinclair Girnigoe), 2.8 km (Duncansby Stacks), about 5 km (Wailing Widow Falls) and 9.7 km (Ardvreck Castle) from the nearest point. Off-route controls: Isle of Skye 28 km; the removed spam cluster 110 km. The result is consistent with attention concentrating along the route, but it is weak evidence: four independent points, hand-entered coordinates and straight-line distances to the nearest point. Confirming it would need a GIS check against the road centreline.
- **10 of 11 lie within 5 km of the route** (Ardvreck Castle 9.7 km). Off-route controls: Isle of Skye 28 km; the removed spam cluster 110 km.
- The check separates on-route from off-route content, so the concentration pattern is geographic, not a by-product of how places were listed.

## Durness: the pinch point in numbers

Durness is the second-most-mentioned place in the dataset (1,945 posts, 3.3%) and the clearest case of demand exceeding local capacity. Highland Council rangers' counts reported by the Press and Journal (27 Sep 2022) record approximately **14,000 motorhomes and 10,800 tents within a five-mile radius over July–August**, against a permanent population of **350**. At Ceannabeinne Beach, rangers reported up to 70 tents a night at peak and an estimated 1,000 fires over six months, with 'regular human toileting' by the burn, in caves and in dunes; human waste was also recorded around Ardvreck Castle.



**Plate 3.** Beach and cliffs at Durness, Sutherland.

Linked to section 4, "Durness: the pinch point in numbers": the second-most-mentioned place in the dataset (1,945 posts, 3.3%), where rangers counted about 14,000 motorhomes and 10,800 tents over July and August 2022 against a resident population of 350. *Photo: Nick Elliott / Unsplash.* unsplash.com/photos/XVI6NfFtmw4

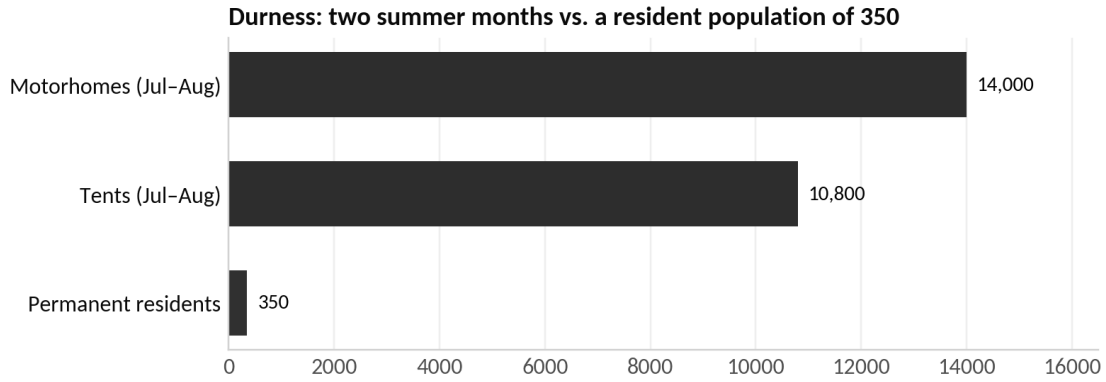



**Figure 4.** Durness: two summer months of touring-vehicle and tent counts against resident population.
Source: Press and Journal, 27 September 2022, citing Highland Council ranger and warden counts within five miles of Durness.

Instagram sentiment also dips on this stretch. Among places with ≥100 posts, Durness, Dunrobin, Smoo Cave and Eilean Donan score lowest (mean sentiment score 0.38–0.41), against 0.61–0.65 for Helmsdale, Achiltibuie, Poolewe, Dingwall and Inverness. Scores remain net-positive throughout, plausibly reflecting more weather- and logistics-focused captioning on the remoter legs.

**Visitor accounts of Durness.** Two visitors posting about the same stretch in 2023 described it very differently:

> **VISITOR VOICES · DURNESS**
>
> *"Durness beach was empty for a change so I jumped down at high tide and grabbed some obligatory stormy beach shots. […] I still have a few more days left of my trip so hopefully things will improve otherwise I'll be left with tourist pics"*
>
> — **@pamelamarshallphotos**, Instagram post, 4 July 2023 (location tag: Durness Beach). **Q2**
>
> *"It was wonderful to be the only one on the beach most days despite it being a bank holiday weekend in August! It felt truly wild and like I could slow down and just be at peace."*
>
> — **@ab_imagery_**, Instagram post, 1 November 2023 (location tag: Durness). **Q3**

These are single observations. They do not contradict the ranger counts, which are totals for two summer months across a five-mile radius; they suggest that the experience of crowding depends on the site and the day. The first post's "obligatory" beach shot and "tourist pics" show the aesthetic framing this paper is about: the photograph of a named place is part of the trip.

# 5. Visitor sentiment and the resident record

The Instagram record supplies the fantasy half of the picture with precision: 66.7% of core posts score positive (mean sentiment score +0.46; traveller subset 61.1%, +0.40), and only 5.8% score negative. Where posts are negative, the cause is overwhelmingly weather.



**Plate 4.** Stac Pollaidh, Coigach, north of Ullapool.

Linked to section 5, "Visitor sentiment and the resident record": uncrowded landscape imagery of this kind carries the tag (landscape / scenery 21.8% of core posts; 66.7% of posts score positive), while the strain is reported mainly by residents. *Photo: K B / Unsplash.* unsplash.com/photos/Refc2Km3IM4

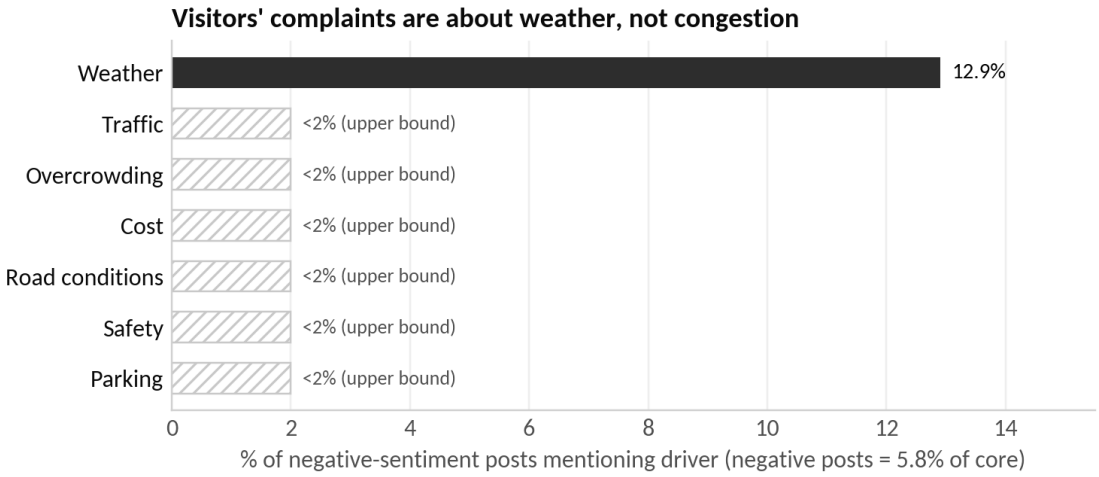



**Figure 5.** Drivers of negative-sentiment posts.

Source: Instagram analysis, section 8; VADER score of −0.05 or below. Hatched bars show a reported ceiling (<2%), not a measured value.

**Where visitors' posts are negative,** the cause is most often the weather, and the tone is rueful rather than critical of the route:

> **VISITOR VOICES · WEATHER**
>
> *"Day 5 of our NC500 cycling odyssey couldn't have been more brutal. […] We found ourselves drenched to the bone, shivering in the frigid rain, and desperately trying to fix it."*
>
> — **@kevin.pw.wang**, Instagram post, 12 September 2023 (location tag: Tongue, Highland). **Q4**

> *"Would cycle this route again now if I could despite getting eaten alive by midges, the highland midge is no joke! […] we were swarmed along the west coast so bad that in the morning we had to abandon cooking our breakfast, pack our tents and just carry on riding till we found a spot away from the midges"*
> — **@gdextreme**, Instagram post, 1 August 2023. **Q5**

**Visitors rarely post about the strain, but some notice it.** About two in five visitors told the BiGGAR survey that traffic congestion had spoilt their enjoyment of the route, against almost four in five residents who see detrimental congestion daily or often. The infrastructure case therefore rests mainly on the resident survey, not on visitor sentiment. Visitor enjoyment is itself part of the policy problem, because it sustains demand.

**Where visitors do mention other people or waste,** it is often as an expectation that was not met, or as the absence of rubbish rather than its presence. Both posts below also show social media shaping what visitors expect to find:

> **VISITOR VOICES · EXPECTATIONS AND WASTE**
>
> *"A highlight of our Scottish road trip was driving the Bealach na Ba. […] We watched the videos (of course!) with too many cars trying to pass on the infamous hair pin bends so I was a little nervous, but other than a few cyclists (why?!) and a Ferrari (one day!) we had the road almost to ourselves!"*
> — **@real_life_dreamers**, Instagram post, 20 June 2023. **Q6**
>
> *"Waking up at a huge sandy bay with no one else around has to be high up on the list why Scotland is AMAZING. It's still possible to find quiet pockets of vast unspoilt scenery. […] What was so good was zero rubbish on arrival. This spot has genuinely been kept tidy by any locals & visitors even though there's no bins or toilets."*
> — **@s_a_r_a_h_614**, Instagram post, 13 May 2023. **Q7**

## The resident record

BiGGAR Economics' May 2026 assessment for North Coast 500 Ltd reports the following, from surveys carried out in late 2025:

| Indicator | Finding |
|---|---|
| Vehicles passing key count points on the route, 2014 to 2025 | +83% |
| Residents seeing detrimental traffic congestion daily or often | 79% (49% daily, 30% often) |
| Visitors saying congestion spoilt their enjoyment of the route | about 2 in 5 |
| Residents who have seen damage to the environment | 90% (visitors: 38%) |
| Residents seeing litter daily or often | 85% |
| Residents seeing human waste daily or often | just over half |
| Residents who have seen behaviour that could cause a wildfire | 77% |
| Visitors who did not light a barbecue or campfire on their trip | 88% |
| Residents seeing dangerous or irresponsible driving very often | more than half (visitors: under 1 in 10) |
| Residents who believe their community is overburdened by visitors* | 95% |
| Residents who strongly disagree that North Coast 500 Ltd acts in the local interest | 61% |
| Residents who trust the North Coast 500 Ltd leadership team to act in the local interest | 5% |
| Travellers using a campervan or motorhome | about a third |
| Visitors staying in the North Highlands for more than seven days | 52% |
| Incidents recorded by Highland Council rangers, 2025 (fire marks, bags of litter, toileting, motorhome waste dumping) | 4,743 |

| Indicator | Finding |
|---|---|
| Economic contribution of the route, 2025 | £98.8m GVA; about 1,335 jobs |
| Businesses saying NC500 visitors helped them grow / let them open longer, extend their season or widen their range | 69% / 41% |

**Table 4.** Source: BiGGAR Economics (2026), Building a Sustainable Future for the North Coast 500, May 2026. Surveys of 828 residents, 617 visitors and 99 businesses, late 2025; traffic from Department for Transport counts. *BiGGAR describes this as an indirect measure built from similar, but not identical, questions. The report was commissioned by North Coast 500 Ltd. Confidence: High on the figures as published; Moderate on linking the strain to social media demand rather than to tourism growth in general.

**Context.** BiGGAR also cites Highland Council ranger data for 2025 showing that other parts of the Highlands face similar problems with informal camping, litter and toileting, in some places worse than on the NC500. The pressure documented here is real but not unique to the route.

# 6. The Visitor Levy: legal basis, proposal and gap

## Legal basis

The Visitor Levy (Scotland) Act 2024 (Royal Assent 5 July 2024) lets councils levy overnight accommodation. Net proceeds must be used for 'developing, supporting or sustaining facilities and services which are substantially for or used by persons visiting' the area (section 19(1)). A scheme cannot come into force until **at least 18 months** after the council decides to introduce it (section 14(3)). Councils must consult communities, tourist organisations and tourism businesses (section 13(1)(b)).

The Visitor Levy (Amendment) (Scotland) Act 2026 (Royal Assent 21 May 2026) allows councils to charge **a fixed amount per night** instead of a percentage, with different amounts by accommodation type, subject to ministerial caps; it lets providers retain an administrative deduction and requires councils to report on impacts on **rural tourism businesses and communities**. Highland's tiered scheme depends on this amendment.

## The Highland proposal

| Element | Proposal (consultation opened 7 Sep 2026) |
|---|---|
| Rate: hotels, guest houses, B&Bs, rooms in houses, short-term lets | £5 per room / area per night |
| Rate: hostels, campsites, caravan parks | £2 per room / area per night |
| Season | Nine months; December, January and February excluded |
| Provider retention | 5% for administration |
| Estimated revenue | ~£9m per year |
| Decision | Full Council, 10 December 2026 |
| Earliest collection | ≥18 months after decision (≈ June 2028) |

*Table 5. Source: Highland Council consultation notice (highland.gov.uk news article 17462) and Visitor Levy project page.*



**Plate 5.** Buildings at John o' Groats, the north-east corner of the route.

Linked to section 6, "The Highland proposal": the levy is charged per room or area per night on fixed accommodation (£5 for hotels, B&Bs and short-term lets; £2 for hostels, campsites and caravan parks). *Photo: Dalila Moreira / Unsplash.* unsplash.com/photos/s4M5lRyft3s

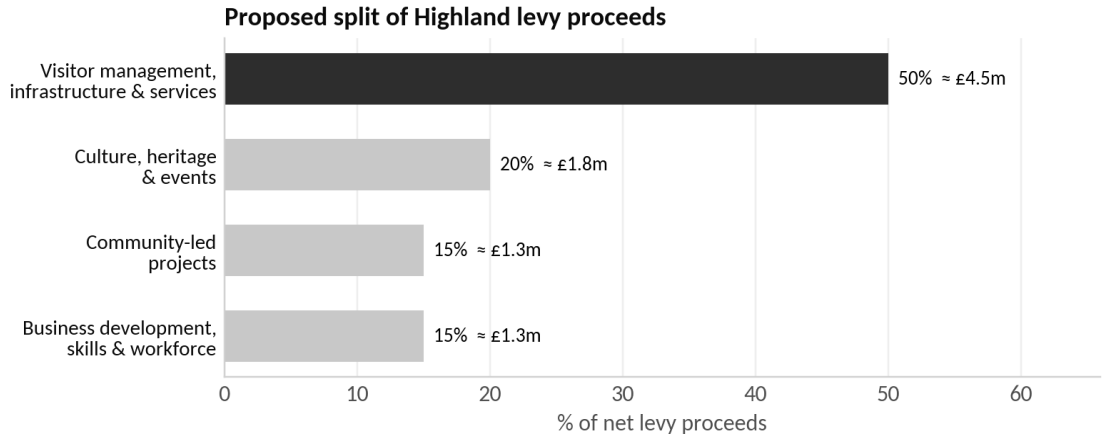



**Figure 6.** Proposed allocation of net levy proceeds.
Source: Highland Council consultation notice, Sep 2026. £ values are indicative: shares applied to the Council's about £9m estimate.

Half of net proceeds is proposed for **visitor management, infrastructure and services**. On the Council's estimate that is about £4.5m a year for the whole Highland area. That line matters because Scotland's existing capital route, the Rural Tourism Infrastructure Fund (RTIF; £24.5m across 86 projects since 2018; currently closed), explicitly **does not fund revenue activity such as ranger services or maintenance**. The levy is the first recurring revenue source that can.

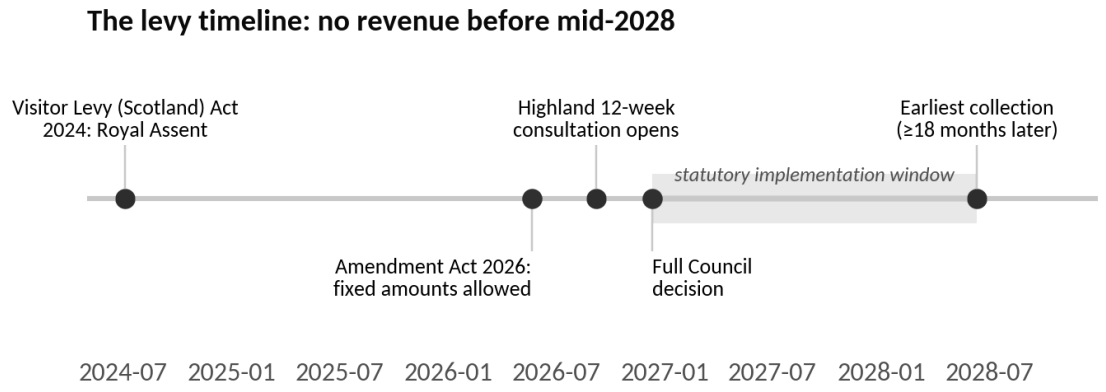



**Figure 7.** Statutory timeline.
Source: legislation.gov.uk (Act 2024; Amendment Act 2026); Highland Council consultation notice.

## The touring-vehicle gap

The levy is a charge on accommodation. The Act's explanatory notes (para. 16) confirm it applies to 'overnight parking of a campervan at a campsite' but not to campervan hire. Highland Council states on its Campervan and Motorhome Scheme page that 'the Visitor Levy will only apply to fixed accommodation such as hotels and B&Bs'. The Scottish Outdoor Access Code confirms that 'access rights don't include motor vehicles', so van overnighting off-site depends on landowner or council tolerance, not a right.

The consequence, read against Section 3: **the travel mode the data shows is dominant (14–31% of posts) contributes to the levy only when it uses a formal campsite, and then at the lower £2 tier.** A van parked overnight in a lay-by or car park pays nothing.



**Plate 6.** Sango Bay, Durness, from the air (photographer's title: "Sango Sands Oasis", the campsite above the bay).
Linked to section 6, "The touring-vehicle gap": a campervan contributes to the levy only when it stays on a formal site such as this, and then at the £2 tier. Parked overnight in a lay-by or car park, it pays nothing. *Photo: Colin Horn / Unsplash.* unsplash.com/photos/0F9AvPuqvxA

The Council already runs a partial remedy. The voluntary Highland Campervan and Motorhome Scheme (launched July 2024) sells a **£40 seven-day membership** (pricing) for overnight parking 22:00–08:00 at 12 designated car parks, with shower access at High Life Highland centres and a stated £2.25m infrastructure commitment. Eleven of the twelve car parks are on or beside the NC500 (Inverness, Dunnet Head ×2, Noss Head, Reiss, Wick, Durness, Golspie, Ullapool, Gairloch, Little Gruinard). **None is in Assynt/Lochinver or Applecross**, two of the eight most-posted places in the dataset.

Whether Highland could make vehicle overnighting charges mandatory is **Unknown**: the Loch Lomond byelaws rest on National Park powers Highland Council does not hold, so legal advice is required (Recommendation 2).

**Visitor posts show the practices the proposed levy would and would not reach:** an occasional campsite stop for facilities, a night in a car park in a place with no scheme car park, and off-grid camping described as free.

> **VISITOR VOICES · WHERE TOURING VEHICLES STAY**
>
> *"Occasionally the need for a nice hot shower, and use of facilities necessitated a stop off at a proper campsite. Scourie Caravan Park had the most powerful showers I've ever experienced so I can see why it's a popular spot for anyone doing the NC500! […] We only stayed one night but would happily return."*
> — **@willdashwood**, Instagram post, 10 October 2022 (location tag: Scourie Bay). **Q8**
>
> *"I parked up the van for the night in a carpark overlooking Applecross village in Scotland."*
> — **@stevenplaylephoto**, Instagram post, 12 August 2023 (location tag: Applecross). **Q9**
>
> *"Off grid camping in Cranstackie national reserve… no crowds, no fees, just us and the mountains."*
> — **@greg_and_georgie**, Instagram post, 20 May 2023. **Q10**

| Scheme | Charge | Covers off-site touring vehicles? |
|---|---|---|
| Highland levy (proposed): hotels, B&Bs, short-term lets | £5 / room / night | No |
| Highland levy (proposed): campsites, caravan parks, hostels | £2 / pitch or room / night | Only at a campsite |
| Highland Campervan & Motorhome Scheme (voluntary, since 2024) | £40 / vehicle / 7 days (≈£5.71/night if all 7 used) | Yes, voluntary, 12 car parks |
| Loch Lomond & Trossachs camping byelaws (Mar–Sep) | £4.30 / tent or motorhome / night (permit) | Yes, mandatory within zones (<4% of park); fines up to £500 |

| Scheme | Charge | Covers off-site touring vehicles? |
|---|---|---|
| Iceland lodging tax (from 1 Jan 2025) | 800 ISK / unit (hotels); 400 ISK / unit (campsites and motorhome parking spots) | Yes, designated motorhome parking is taxable |
| Norway visitor contribution (in force 1 July 2026; municipal opt-in) | Up to 3% of the accommodation price; campsite cabins included | No: own motorhomes, caravans, tents and campsite pitches excluded |
| New Zealand (national) | International Visitor Levy (IVL) of NZ$100 per visitor on entry; freedom camping restricted to certified self-contained vehicles | Yes, by vehicle standard, not charge |

*Table 6. Per-night and vehicle-based charges compared. Sources: Highland Council; Loch Lomond & Trossachs National Park; Skatturinn (Iceland Revenue and Customs); Ministry of Business, Innovation and Employment (MBIE), New Zealand; Norwegian Government (besøksbidrag guidance). Currency conversion deliberately omitted.*

# 7. Lessons from other routes

No comparator is a clean natural experiment; each differs in scale, governance and funding. They are used here for mechanisms, not for effect sizes.

## Wild Atlantic Way (Ireland)

The closest analogue: a branded scenic driving route marketed as a single product. Fáilte Ireland's Wild Atlantic Way Regional Tourism Development Strategy 2023–2027 reports, for 2019, **€3bn in tourism value, 80,000 jobs, and one million more international visitors than in 2014**; the region takes 36% of overseas and 43% of domestic trips in Ireland. Overseas visitors average **6.9 nights** in the region, domestic visitors 3.

- **Dispersal is the explicit goal.** The strategy aims to 'extend the season and disperse visitors more widely within the region, minimising any adverse impacts,' and to grow revenue 'at a faster rate in areas that are currently less visited'.
- **Honeypots get plans.** It calls for 'strong visitor management plans for those towns and attractions that are near to, or at, capacity in high season' and concentrates investment on Signature Discovery Points (Bray Head, Cliffs of Moher, Keem Bay, Malin Head), with an environmental monitoring programme.
- **The campervan problem recurs.** In 2016 the Irish Examiner reported the 2,500 km route lacked purpose-built motorhome facilities, with up to 30 motorhomes overnighting in Dingle marina car park. A decade later the Southern Star (4 Sep 2026) reports about 168,000 of 9.8 million Wild Atlantic Way (WAW) tourists in 2024 stayed in campsites or motorhomes, beach bylaws against overnighting going unenforced, and councils awaiting a Fáilte Ireland motorhome working group. Low-cost aires work where built: Dungarvan's €10/24h aire took €430 from 43 vans in one night.

**Lesson for NC500:** a route brand scaled demand faster than touring-vehicle infrastructure in both countries. The WAW response (site-specific visitor management plans plus a monitored dispersal objective) is directly transferable; its unresolved motorhome gap is the warning.

## Iceland

Iceland's lodging tax charges 800 ISK per unit per night in licensed hotels and guesthouses and 400 ISK per unit at 'camp sites and parking spots for motorhomes', plus 2,500 ISK per passenger per day for international cruise ships. **It taxes the vehicle pitch explicitly**, the design feature the Highland proposal lacks.

Iceland also limits where vehicles may stay overnight. Its access rules allow a traditional tent for one night in some places, but spending the night in caravans, campervans or similar vehicles outside organised campsites or urban areas is illegal without the landowner's permission (Environment Agency of Iceland).

## New Zealand

New Zealand addressed touring-vehicle impacts through vehicle standards rather than price. The Self-contained Motor Vehicles Legislation Act 2023 restricts freedom camping on council land to certified self-contained vehicles with a fixed toilet (in force 7 June 2023; private-vehicle transition extended to 7 June 2026). Separately, the International Visitor Conservation and Tourism Levy of NZ$100 per visitor funds conservation and visitor infrastructure nationally.

## Norway: access for people, not vehicles

Norway is the closest legal comparator to Scotland. Both have a strong public right of access to land, and both keep vehicles outside it. Norway's right of access (allemannsretten) is protected in the Outdoor Recreation Act, but, in the words of the national tourist board, it 'applies to people, not vehicles'. Vehicles may only be driven or parked where motor vehicle law allows. Roadside parking beside open country is allowed unless signs say otherwise, at least 150 metres from houses and cabins and for no more than two nights in one place without the landowner's permission (Visit Norway). Scotland's Outdoor Access Code draws the same line: access rights do not include motor vehicles.

**Scenic routes as infrastructure.** Norway's National Tourist Routes are 18 road sections totalling 2,240 km, built around purpose-designed rest areas, viewpoints and toilets (Visit Norway). A secondary source puts state investment at about NOK 800m (about €100m) (summary; Moderate). Visit Norway also warns that some routes are narrow for caravans and motorhomes, which must use passing places, as on much of the NC500. The facilities are part of the attraction, not an afterthought.

**Norway's new visitor levy has the same gap as Highland's.** The Storting passed a visitor contribution act (besøksbidrag) in summer 2025, in force from 1 July 2026. Municipalities may opt in and charge up to 3% of the accommodation price (Visit Norway). The money may only be spent on tourism-related public goods such as trails, nature areas and public toilets. The Government's guidance states that campsites and motorhome parks renting out ground are outside the charge, and that nights in visitors' own caravans, motorhomes and tents are not covered; only campsite cabins are (Norwegian Government). As of September 2026, five municipalities had applied: Tromsø, Lyngen, Karlsøy, Vågan (Lofoten) and Stranda.

**Lesson for NC500:** Norway confirms that the touring-vehicle gap in Highland's proposal is not a local oversight but a common design choice in accommodation levies. Norway relies on traffic rules and commercial charges, such as campsite pitch fees, to manage vehicles, not on its levy. Iceland, by contrast, closed both gaps: it taxes motorhome parking spots (above) and makes overnighting in campervans outside campsites illegal without the landowner's permission (Environment Agency of Iceland; Nature Conservation Act No. 60/2013). Highland can choose either model, but it should choose one deliberately (Recommendation 2).

## Great Ocean Road and Loch Lomond

- **Great Ocean Road (Victoria):** 30 public bodies with overlapping remits were replaced by a single statutory Great Ocean Road Coast and Parks Authority under the Great Ocean Road and Environs Protection Act 2020, prompted by rising visitation on a 243 km route (Action Plan). The NC500 is run by a private company, NC500 Ltd, with public duties spread across Highland Council, Transport Scotland and others. This is a governance question outside this paper's evidence base but relevant to who spends the levy.

- **Loch Lomond & The Trossachs:** camping management byelaws require a permit (£4.30 per tent or motorhome per night) or campsite use from March to September in zones covering under 4% of the park, with fines up to £500 and a commitment to at least 300 low-cost spaces. The Park publishes no quantitative outcome assessment on that page (Unknown effect size).

# 8. Trip length and the case for slower travel

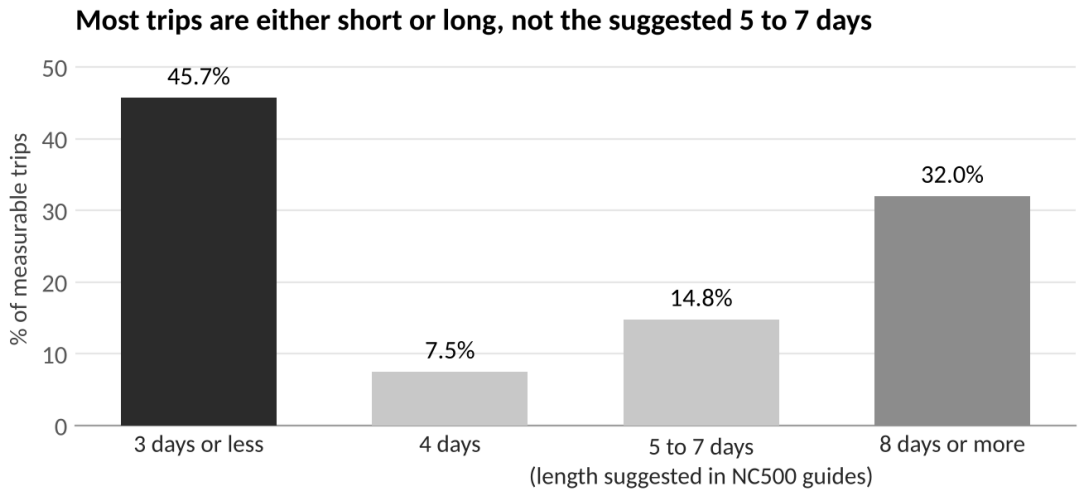



**Figure 8.** Estimated trip length, likely-traveller subset.

Source: Instagram analysis, section 10; each account's dated posts grouped into trips (posts no more than four days apart count as one trip, within one calendar year and 45 days at most); 2,125 trips. '4 days' covers trips of exactly four days. Median 4 days, mean 8.5.

Trip lengths cluster at the two ends: **45.7%** of measurable trips span three days or fewer, **32.0%** span eight or more, and only **14.8%** fall in the 5–7-day window NC500 guidance suggests. The ≤3-day segment is most likely to compress its stops onto the same must-photograph hotspots; the ≥8-day segment is the natural dispersal target, having the time budget to visit secondary sites.

**Both ends of the distribution are visible in how visitors describe their own trips:** a long weekend, a trip cut short by work and a fortnight limited by time.

> **VISITOR VOICES · HOW LONG**
>
> *"Spent the long weekend exploring some of the west coast side of the NC500. […] Highlight was defo visiting my bucket list beach Achmelvich […] Loved the driving in the single track roads too, winding our way round, up, over and down some of the Scottish hills and mountains."*
>
> — **@lissa_albabloo**, Instagram post, 13 June 2023. **Q11**
>
> *"[…] we both reckon we had more days on the road in us, if time had allowed. Can see why people do the north coast 500 - although I'd want a couple of weeks to see it properly and not rush through it."*
>
> — **@samotage_**, Instagram post, 3 September 2023. **Q12**
>
> *"We have just spent a fabulous couple of weeks driving the NC500 in Scotland. […] I can not wait until we are no longer tied by time so we can go back to take our time discovering even more"*
>
> — **@wechangedourlives**, Instagram post, 13 July 2023 (location tag: Dunnet Head). **Q13**

**A different measure.** BiGGAR's visitor survey found that 52% of visitors stayed in the North Highlands for more than seven days. Survey respondents and Instagram posters are different groups, and a stay in the region is not the same as a trip on the route, so the two figures are not directly comparable. Together they suggest longer stays are more common than the Instagram record alone shows.



**Plate 7.** Kylesku Bridge, Sutherland, with a motorhome parked beyond the north end of the bridge.

Linked to section 8: Kylesku draws 1.4 to 1.6% of core posts, a secondary stop of the kind the 8-day-plus segment (32.0% of measurable trips) has the time budget to reach, and the natural target for dispersal (Recommendations 5 and 6). *Photo: Colin Horn / Unsplash.* unsplash.com/photos/kTziSughZOQ

**Confidence: Moderate**. *Only about 24% of traveller-subset accounts post more than once on a trip, so the shape is indicative, not a population average. It is not directly comparable with the WAW's 6.9 overseas nights, which is a survey measure.*

## Who travels, and how they feel

Only **8.6%** of traveller posts state any travel party or motive. Where they do, family (2.3%) and travelling with a dog (2.0%) lead, ahead of friends (1.8%), bucket-list (1.1%), solo (1.0%), romantic couple (0.8%) and milestone trips (0.7%). Content is scenery- and activity-led, not occasion-led.

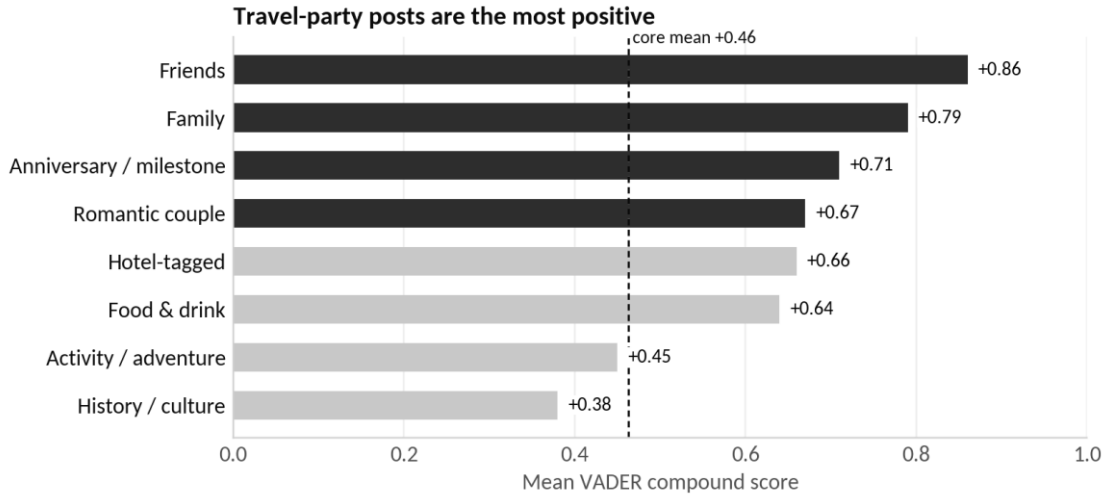



**Figure 9.** Mean sentiment by travel party and content type.

Source: Instagram analysis, section 8, VADER sentiment score. Travel-party segments (dark bars) are each ≤3% of traveller posts.

Travel-party posts are markedly happier than average, and hotel-tagged posts (+0.66) score well above the core mean. Age, gender, nationality and home location are **not measurable** from this data and were not inferred.

# 9. Policy recommendations

Dated to the statutory timeline: consultation closes late November 2026; Council decides 10 December 2026; earliest collection around June 2028.

1. Within the 50% visitor-management line, name the Durness–Ullapool–Assynt corridor and the Applecross / Bealach na Bà cluster as priority allocations, with a defined minimum share, rather than deciding spatial allocation after go-live. *Evidence: sections 4–5.*
2. (a) Extend the Highland Campervan and Motorhome Scheme to Assynt/Lochinver and Applecross, the two top-eight geotag clusters without a scheme car park. (b) Commission legal advice on making overnight vehicle parking at designated hotspots chargeable (the Iceland model taxes motorhome parking spots; the Loch Lomond model uses permits). (c) Use the Amendment Act 2026 rural-impact reporting duty to seek, if needed, national powers for a vehicle-pitch charge. *Evidence: section 3, section 6, section 7.*
3. Run procurement, land agreements and ranger recruitment in parallel with the 18-month clock so spend starts at go-live. Prioritise revenue lines RTIF cannot fund: rangers, toilet servicing, waste collection. *Evidence: section 6.*
4. Build low-cost serviced overnight points (water, grey/black waste, bins) at hotspot approaches; Irish evidence shows €10-a-night aires fill where they exist, and unenforced bans do not work. *Evidence: section 7.*
5. Commission an annual refresh of this Instagram analysis plus a repeat of the BiGGAR resident survey. Adopt falling geotag share at the top-five north-west locations, and falling resident-reported waste and congestion, as named levy KPIs, following the WAW environmental-monitoring model. BiGGAR (2026) makes the same recommendation to North Coast 500 Ltd: an annual resident survey and progress report against its ESG framework. *Evidence: section 4, section 7.*
6. Because 78% of #NC500 content comes from repeat (predominantly business) accounts, tie NC500 Ltd and VisitScotland co-marketing and familiarisation support to a dispersal component (at least one secondary location per campaign) and build a multi-night ‘slow NC500’ product aimed at the ≤3-day segment. *Evidence: section 2, section 8.*

**Visitor evidence for Recommendation 4.** A motorhome traveller’s description of a donation-funded stop with services shows what a low-cost serviced overnight point offers, and that visitors recommend it:

> **VISITOR VOICE · EVIDENCE FOR RECOMMENDATION 4**
>
> *“Last night we stopped off in Balintore, a stones throw from the Mermaid of the North. Great park up with fantastic facilities, black and grey emptying, fresh water, toilet. All for a donation for upkeep. Also had shower and washing machine for a small charge. Would definitely recommend a stop off if on the NC500.”*
>
> — **@thewildthorneberrys**, Instagram post, 25 September 2022 (location tag: Mermaid of the North). **Q14**



**Plate 8.** Ruins on the shore of Loch Assynt, in the Ardvreck Castle area.

Linked to Recommendation 2: Assynt / Lochinver is a top-eight geotag cluster with no Highland Campervan and Motorhome Scheme car park, and human waste was recorded around Ardvreck Castle (section 4). *Photo: Janita Top / Unsplash.* unsplash.com/photos/tZPMlHd7gXY

# 10. Limitations and confidence

- **Recency and self-selection.** 99.9% of posts date from 2022–24; only public posters who tag #NC500 are visible, skewed towards younger, English-speaking, photography-motivated users. **High** that the skew exists; **Unknown** its magnitude.
- **Business-dominated sample.** 78% of core posts come from accounts posting ≥4 times. Visitor-behaviour statistics use the ≤3-post subset to reduce this bias; the threshold is a judgement call.
- **Strict keyword matching.** All theme, mode and infrastructure percentages are minimum estimates.
- **Little visitor complaint online.** Under 2% of negative posts mention congestion, yet about 2 in 5 visitors surveyed by BiGGAR said it spoilt their enjoyment. Instagram understates visitor concern, so the strain case rests mainly on the resident survey.
- **Weak indirect measures.** Trip length (section 8) is Moderate. Posting time, used as an indirect measure of overnighting, was tested and is **inconclusive**: van and non-van posts show the same evening/night share (38.6% vs 39.6%); hub variation (Inverness 33%, John o' Groats/Applecross 47–49%) is better explained by sunset photography.
- **Geography.** The route line (about 38 points) and the list of 44 places were compiled by hand. A check using the four attractions that are independent of the line placed all four within 10 km of it (section 4), but that is weak evidence and not survey-grade mapping.
- **Source retrieval.** Highland Council, legislation.gov.uk and comparator sources were retrieved directly on 28 September 2026. Resident, visitor and business figures are taken from the BiGGAR Economics report (May 2026) and checked against it. That report was commissioned by North Coast 500 Ltd, and its surveys were online and self-selected.

## Cross-check against the BiGGAR surveys (2026)

- **Campervan share.** Instagram: 24.9% to 31.0% (broad definition). BiGGAR: about a third of travellers. Confirmed.
- **Congestion.** Instagram: under 2% of negative posts. BiGGAR: about 2 in 5 visitors said congestion spoilt their enjoyment. Partly contradicted: online posts understate visitor concern.
- **Longer stays.** Instagram: 32.0% of trips last 8 days or more. BiGGAR: 52% of visitors stay in the North Highlands more than seven days. Same direction; different measures.
- **Resident strain.** Not measurable on Instagram; BiGGAR is the primary source (Table 4).

# 11. Conclusion

The north-west of the route draws the most online attention and carries the most resident-reported strain (Confidence: Moderate on the link between the two). Campervans and motorhomes are the most visible travel mode in the data, yet the proposed levy reaches them only on a formal campsite, at £2 a night.

The levy can pay for the rangers, toilets and waste services that capital grants exclude, but no money arrives before about June 2028. The Council can use the time before its decision on 10 December 2026 to fix the spatial allocation and the touring-vehicle gap, and the 18 months after it to have services ready when collection starts.

# 12. References and sources

## Policy and legal instruments

| Instrument | Relevance |
|---|---|
| Visitor Levy (Scotland) Act 2024 (asp 8), sections 13, 14(3) and 19(1) | Power to levy; consultation duty; 18-month lead-in; ring-fence to visitor facilities and services |
| Visitor Levy (Amendment) (Scotland) Act 2026 (asp 18) | Enables fixed per-night and tiered rates; admin retention; rural-impact reporting |
| Highland Council tiered fixed-amount Visitor Levy proposal (Sep 2026) | £5 / £2 rates; 50/20/15/15 allocation; decision 10 Dec 2026 |
| Highland Campervan and Motorhome Scheme (2024) | Voluntary £40/7-day overnight parking at 12 car parks |
| Scottish Outdoor Access Code | Wild camping limits; access rights exclude motor vehicles |
| Rural Tourism Infrastructure Fund (VisitScotland) | Capital only; excludes rangers and maintenance |
| Loch Lomond & Trossachs camping management byelaws | Seasonal permit model for tents and motorhomes |
| Wild Atlantic Way Regional Tourism Development Strategy 2023–2027 | Dispersal, visitor management plans, monitoring |
| Iceland lodging tax (2025 rates) | Per-unit tax including motorhome parking spots |
| NZ Self-contained Motor Vehicles Legislation Act 2023; IVL | Vehicle-standard regulation; national visitor levy |
| Great Ocean Road and Environs Protection Act 2020 (Victoria) | Single statutory route authority |

## Sources (retrieved 28 September 2026)


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- Visit Norway: Visitor contribution (accommodation tax). https://www.visitnorway.com/travel-trade/visitor-contribution-accommodation-tax/
- Environment Agency of Iceland: Where can you camp? https://ust.is/english/visiting-iceland/travel-information/where-can-you-camp
- Victoria State Government: Great Ocean Road Action Plan. https://www.marineandcoasts.vic.gov.au/marine-coastal-management/great-ocean-road-action-plan

Underlying dataset: 'The #NC500 Instagram Landscape' analysis, supplied by the author; Apify Instagram Hashtag Scraper export, scraped 16 February 2024. BiGGAR Economics (2026) Building a Sustainable Future for the North Coast 500: an impact assessment and environmental, social and governance framework. Edinburgh: BiGGAR Economics, May 2026. Commissioned by North Coast 500 Ltd. https://biggareconomics.co.uk/wp-content/uploads/2026/05/Building-a-Sustainable-Future-an-impact-assessment-and-ESG-framework-for-the-NC500.pdf


## Instagram posts quoted (Q1–Q14)

Short extracts from fourteen public Instagram posts are quoted in sections 3 to 9 to illustrate themes that counts cannot show. They are illustrations, not a sample. They were chosen from the likely-traveller subset (accounts posting three times or fewer) by keyword search on the paper's themes, then read and selected by the author for relevance and clarity. Only public posts are quoted; every account holder is identified by the public handle shown on the post, with the post date and link. Accounts that appeared to be businesses were excluded from the search.

**Method of quotation.** Extracts are verbatim. Emoji, hashtags and mentions of other accounts are omitted; omissions within an extract are marked […]; a companion's first name is replaced by [name omitted]; spelling and wording are as posted, and spacing and punctuation marks have been normalised. The posts were collected on 16 February 2024 and may since have been edited or deleted. The account holders were not contacted. Anyone who wants an extract removed should contact the author (see front matter).

| Ref | Handle | Post date | Location tag | Post URL |
|---|---|---|---|---|
| **Q1** | @elliesimages | 20 September 2023 | — | https://www.instagram.com/p/CxbPZ0foDhs/ |

| Ref | Handle | Post date | Location tag | Post URL |
|---|---|---|---|---|
| **Q2** | @pamelamarshallphotos | 4 July 2023 | Durness Beach | https://www.instagram.com/p/CuSesBqsigZ/ |
| **Q3** | @ab_imagery_ | 1 November 2023 | Durness | https://www.instagram.com/p/CzHG3pfiuGv/ |
| **Q4** | @kevin.pw.wang | 12 September 2023 | Tongue, Highland | https://www.instagram.com/p/CxFNPn_tMR5/ |
| **Q5** | @gdextreme | 1 August 2023 | — | https://www.instagram.com/p/CvalFH8sGvQ/ |
| **Q6** | @real_life_dreamers | 20 June 2023 | — | https://www.instagram.com/p/Ctt94WyoZ1C/ |
| **Q7** | @s_a_r_a_h_614 | 13 May 2023 | Nc500 | https://www.instagram.com/p/CsMSfcEMHQz/ |
| **Q8** | @willdashwood | 10 October 2022 | Scourie Bay | https://www.instagram.com/p/CjjKKfODoww/ |
| **Q9** | @stevenplaylephoto | 12 August 2023 | Applecross | https://www.instagram.com/p/Cv2mC7Qo32G/ |
| **Q10** | @greg_and_georgie | 20 May 2023 | — | https://www.instagram.com/p/CsdN5vEsQEV/ |
| **Q11** | @lissa_albabloo | 13 June 2023 | — | https://www.instagram.com/p/CtbdWE1IpTf/ |
| **Q12** | @samotage_ | 3 September 2023 | — | https://www.instagram.com/p/CwvTTGZqx4i/ |
| **Q13** | @wechangedourlives | 13 July 2023 | Dunnet Head | https://www.instagram.com/p/CuoqscqI6Ut/ |
| **Q14** | @thewildthorneberrys | 25 September 2022 | Mermaid of the North | https://www.instagram.com/p/Ci7IycvIWEI/ |

*Source: #NC500 Instagram dataset (Apify Instagram Hashtag Scraper export, scraped 16 February 2024). Location tag is the one the poster attached to the post, where present.*

# Photographs (retrieved 7 October 2026)

All photographs are used under the Unsplash License, which permits free commercial and non-commercial use and does not require attribution; credits are given here and beside each plate as good practice. Locations are as stated by each photographer on the Unsplash photo page. https://unsplash.com/license

- Cover. The NC500 looking west from Glen Docharty towards Kinlochewe, Wester Ross. Photo: John Young / Unsplash. https://unsplash.com/photos/a-winding-road-through-a-valley-G1O0euqP3L8
- Plate 1. A motorhome leading a line of vehicles on a rural road in Scotland. Photo: Peyman Shojaei / Unsplash. https://unsplash.com/photos/motorhome-on-rural-road-in-scotland-fvkKYJW6W94
- Plate 2. Visitors walking into Smoo Cave, Durness. Photo: Sebastian Herrmann / Unsplash. https://unsplash.com/photos/a-group-of-people-walking-into-a-cave-YJtq8u8QUMg
- Plate 3. Beach and cliffs at Durness, Sutherland. Photo: Nick Elliott / Unsplash. https://unsplash.com/photos/a-sandy-beach-next-to-the-ocean-with-people-walking-on-it-XVI6NfFtmw4
- Plate 4. Stac Pollaidh, Coigach, north of Ullapool. Photo: K B / Unsplash. https://unsplash.com/photos/low-angle-photography-of-brown-mountain-under-cloudy-sky-Refc2Km3IM4
- Plate 5. Buildings at John o' Groats, the north-east corner of the route. Photo: Dalila Moreira / Unsplash. https://unsplash.com/photos/a-row-of-colorful-buildings-s4M5lRyft3s
- Plate 6. Sango Bay, Durness, from the air (photographer's title: "Sango Sands Oasis", the campsite above the bay). Photo: Colin Horn / Unsplash. https://unsplash.com/photos/aerial-photo-of-island-undr-cloudy-sky-0F9AvPuqvxA
- Plate 7. Kylesku Bridge, Sutherland, with a motorhome parked beyond the north end of the bridge. Photo: Colin Horn / Unsplash. https://unsplash.com/photos/bridge-on-ocean-kTziSughZOQ
- Plate 8. Ruins on the shore of Loch Assynt, in the Ardvreck Castle area. Photo: Janita Top / Unsplash. https://unsplash.com/photos/a-mountain-with-a-lake-in-front-of-it-tZPMlHd7gXY
- Back cover. Duncansby Stacks, Caithness. Photo: Colin Horn / Unsplash. https://unsplash.com/photos/high-angle-photography-of-beach-under-gray-sky-4lwtROFYGAM

# Appendix A. Methodology

| Step | Method |
|---|---|
| Extraction | Loaded analytically relevant fields from a 1,286-column flattened export: caption, 32 hashtag columns, mentions, location, owner, timestamp, engagement, media type |
| De-duplication | 2 exact duplicate post IDs removed → 60,546 unique posts |
| Spam removal | Top posting accounts and co-occurring hashtags inspected; two Aberdeenshire antiques-shop accounts confirmed by caption text; 2,406 posts (4.0%) removed → 58,140 core |
| Traveller subset | Accounts posting ≤3 times → 12,782 posts from 8,796 accounts (22.0%) |
| Classification | Published keyword lists matched as whole words in captions and hashtags; a post can fall in more than one category; the lists are strict, so they under-count |
| Geography | List of 44 NC500 places matched to caption and location tag (an early unbounded pass matched ‘Tain’ inside ‘mountain’ and was fixed) |
| Sentiment | VADER sentiment score per caption; ≥0.05 positive, ≤−0.05 negative |
| Sponsorship | Exact match on #ad, #sponsored, #partner, #gifted (the structured isSponsored field was 0% throughout and unusable) |
| Route validation | Straight-line distance from 11 named attractions to a hand-drawn route line of about 38 points; only four are independent of the line, so the check is weak (section 4) |
| Trip length | Per-account gap clustering (≤4-day gap), single calendar year, ≤45-day span; 795 multi-year/over-long clusters excluded |
| Demographics | Not inferred: no age, gender, nationality or home-location field exists; inference from names or photos rejected as unreliable |
| Quotations | Fourteen verbatim extracts from public posts by likely travellers (accounts posting ≤3 times), found by keyword search on the paper’s themes and selected by reading; illustrative, not representative; cited by handle, date and link in section 12 |



WHITE PAPER

# The Aesthetic Footprint

## NC500 digital demand, infrastructure strain and the Highland Visitor Levy

White Paper · 8 October 2026

Evidence for the Highland Council statutory Visitor Levy consultation, 7 September to late November 2026.

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*Back cover photograph: Duncansby Stacks, Caithness, near the route's north-east corner. Photo: Colin Horn / Unsplash.* unsplash.com/photos/4lwtROFYGAM
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