North Coast 500 Ltd

A Regenerative Future for the North Highlands

10-Year Strategy 2026–2035







TABLE OF CONTENTS

ABOUT THE NORTH COAST 500	03
EXECUTIVE SUMMARY	04
THE FIRST 10 YEARS OF THE NORTH COAST 500	05
VISION & MISSION	08
STRATEGIC PRIORITIES	10
EMERGING PRIORITY PROJECTS	16
STRATEGIC DELIVERY PHASING	17
OUR APPROACH TO DELIVERY	20
MEASURING IMPACT	21
GOVERNANCE & ACCOUNTABILITY	22
GOVERNANCE STRUCTURE	23
A SHARED FUTURE FOR THE NC500	25

About the North Coast 500 - It's More Than Just a Route

The North Coast 500 is one of the world's most iconic coastal touring experiences, showcasing the breath-taking landscapes, communities and culture of the North Highlands of Scotland.

Stretching across more than 500 miles of spectacular coastal scenery, the route follows the main roads around the northern Highlands, connecting the regions of Wester Ross, Sutherland, Caithness, Easter Ross, the Black Isle and Inverness-Shire.

From white sand beaches and rugged mountains to castles, distilleries and remote coastal villages, the route offers visitors access to some of Scotland's most distinctive landscapes and experiences.

At the heart of the North Highlands are its communities — places shaped by generations of history, culture, resilience and hospitality. These communities form an essential part of the character and identity of the route.

Exploring the North Highlands is therefore more than a journey through scenery; it is an opportunity to connect with the people, stories and heritage that make the region unique.



Executive Summary

The North Coast 500 has become one of Scotland's most internationally recognised tourism experiences and a globally recognised touring route, bringing significant economic value and visibility to the North Highlands. Since its launch in 2015, the route has helped support businesses, employment and tourism growth across the region, contributing to the prosperity of many rural communities. However, the success of the NC500 has also highlighted important challenges relating to infrastructure pressure, visitor behaviour, environmental impact and community sentiment.

This strategy represents the next stage in the evolution of the North Coast 500. It sets out a long-term ambition to position the NC500 as one of the world's leading examples of regenerative tourism, where tourism actively strengthens communities, protects landscapes and delivers meaningful benefit for the people and places of the North Highlands.

The strategy is guided by five strategic priorities:

- Engaged Communities
- Improved Infrastructure
- Responsible Visitors
- Thriving Places
- Visitor Experience

Together, these priorities establish a framework for managing tourism more responsibly, strengthening collaboration and supporting long-term regional resilience.

The strategy also marks a significant evolution in the role of NC500 Ltd. The organisation will increasingly act as the Guardian of the Route, working collaboratively with communities, businesses, public sector partners and stakeholders to support responsible tourism and steward the future of the route.

Context: The First Ten Years of the North Coast 500

The launch of the North Coast 500 in 2015 marked a transformational moment for tourism in the North Highlands of Scotland. Created to encourage economic growth and increase the visibility of the region, the route quickly developed into one of Scotland's most internationally recognised tourism experiences and one of the world's most iconic coastal touring routes.

Over the last decade, the NC500 has helped bring significant economic opportunity to communities across the North Highlands. Tourism businesses have benefited from increased visitor numbers, extended trading seasons and greater international awareness, while the route itself has become a major contributor to the regional visitor economy.

The independent Impact Assessment and ESG Framework commissioned by North Coast 500 Ltd, Highlands and Islands Enterprise, and Highland Council identified the significant role tourism now plays in the regional economy. The research found that tourism supports more than a quarter of all jobs and one in five businesses across the North Highlands.

Between 2014 and 2025, traffic volumes along key parts of the NC500 route increased by 83%, while visitor numbers at attractions across the region also grew substantially.

Businesses surveyed as part of the study overwhelmingly recognised the value tourism linked to the NC500 has brought to the area, with 69% reporting that NC500 visitors had been important to their business growth and 41% stating that visitors enabled them to extend opening hours, lengthen their season or expand the services they offer.

The report estimates that in 2025 alone, tourism linked to the NC500 generated approximately £100 million Gross Value Added (GVA) and supported around 1,335 jobs across the North Highlands. The study also identified the direct contribution of North Coast 500 Ltd itself, estimating that the organisation generated a return of £36 for every £1 invested by its principal shareholders.

However, the assessment also highlighted that the success of the NC500 has created significant pressures for communities, infrastructure and the environment. As visitor numbers have increased, so too have concerns relating to litter, waste, irresponsible driving, congestion and environmental damage.

The research found that:



85% of residents reported seeing litter often or daily along the route



Almost four in five residents experienced traffic congestion often or daily



Nine out of ten residents had seen signs of environmental damage



Almost three in five residents strongly disagreed that the interests of local people or the environment were adequately represented.

The assessment also identified a major shift in public perception over the last decade. Analysis of national media coverage found that perceptions of the NC500 were largely positive in 2015 but had become predominantly negative by 2025, with increasing focus on overtourism, infrastructure pressure and environmental impact.

Importantly, the report recognised that many of these challenges are not unique to the NC500 and reflect wider trends affecting rural tourism across Scotland, particularly the rapid growth in motorhome and campervan travel following the Covid-19 pandemic.

At the same time, the research identified a significant opportunity for the future. Visitor demand for authentic, meaningful and responsible travel experiences continues to grow, with 73% of visitors stating they want their spending to benefit local communities.

The findings of the Impact Assessment make one thing clear: the future success of the NC500 cannot be measured by visitor growth alone.
The next chapter of the NC500 must focus on managing tourism more responsibly, strengthening collaboration, supporting communities and ensuring tourism delivers long-term value for the people and places of the North Highlands.

This strategy has therefore been developed as a direct response to the findings of the Impact Assessment and the extensive stakeholder engagement that accompanied it. It represents a long-term commitment to repositioning the NC500 around the principles of regenerative tourism — where tourism not only sustains places, but actively contributes to their long-term wellbeing, resilience and prosperity.



Vision & Mission

Vision

To establish the North Coast 500 as one of the world's leading examples of regenerative tourism, where tourism strengthens communities, protects landscapes and celebrates the culture and character of the North Highlands.

This vision is guided by four core principles:

Role - Guardian of the Route

NC500 Ltd acts as a steward for the long-term success of the route, supporting responsible tourism, protecting the reputation of the North Highlands and advocating for the wellbeing of the communities and landscapes connected to it.

Delivery - Purpose-Led Partnerships

The strategy will be delivered through collaborative partnerships and investment models that support communities, improve visitor management and create long-term regional benefit.

Evidence - The NC500 Impact Index

Progress will be measured transparently through a robust ESG framework and Impact Index that tracks the economic, environmental and social impact of tourism across the North Highlands.

Outcome - Regenerative Tourism in Action

Tourism becomes a force for long-term positive impact, supporting thriving places, resilient communities and exceptional visitor experiences for generations to come.

Vision & Mission

Mission

To lead and coordinate a collaborative approach to tourism along the NC500, championing responsible travel, supporting local communities and working with partners to deliver positive economic, social and environmental impact across the North Highlands.

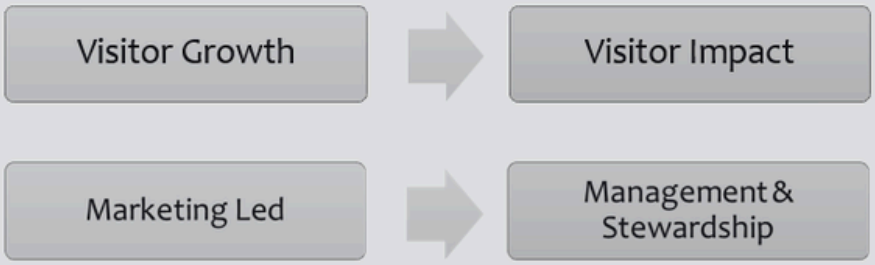
What This Means

The NC500 is more than a driving route. It is a connected network of communities, landscapes, businesses and experiences that together form one of Scotland's most distinctive visitor economies.

This strategy represents a commitment to ensuring that tourism growth is managed responsibly and collaboratively, balancing economic opportunity with the long-term needs of communities, infrastructure and the environment.

By working together with partners, communities and stakeholders, NC500 Ltd aims to support a future where tourism actively contributes to the resilience, prosperity and identity of the North Highlands.

"North Coast 500 Ltd will transition from a destination marketing organisation to a destination management and stewardship organisation, focused on delivering measurable positive impact for the North Highlands."



Strategic Priorities

Over the last decade, the route has delivered substantial economic benefit and global recognition for the North Highlands. However, the findings of the Impact Assessment, alongside extensive stakeholder engagement, highlighted the need for a new long-term approach to tourism management, one that balances economic opportunity with community wellbeing, environmental responsibility and high-quality visitor experiences.

The strategic priorities set out in this strategy represent the areas identified as most critical to the future sustainability and resilience of the NC500 and the wider North Highlands visitor economy.

These priorities have been shaped through:

- The findings of the independent Impact Assessment and ESG Framework
- Stakeholder workshops involving public sector and regional partners;
- Internal strategy development sessions led by NC500 Ltd.

Together, they establish a shared framework for action and collaboration over the next ten years.

Rather than focusing solely on visitor growth, these priorities reflect a broader ambition: to ensure tourism actively contributes to thriving communities, resilient places and the long-term protection of the North Highlands.
The following sections outline each strategic priority, including:

- why it matters;
- the strategic aims and objectives;
- and the priority projects that will help deliver long-term regenerative tourism outcomes across the region.

Engaged Communities

Strategic Aim

To ensure tourism delivers meaningful value for communities and that local voices help shape the future of the NC500.

Why This Matters

Communities are central to the long-term success of the NC500. Feedback from the Impact Assessment highlighted concerns around representation, tourism pressures and whether local people feel tourism benefits their area. Strengthening community involvement and demonstrating local value will be essential to building trust and supporting regenerative tourism outcomes.

Objectives

- Strengthen community involvement in tourism planning and decision-making
- Improve trust, transparency and communication between NC500 and communities
- Support initiatives that celebrate local culture, heritage and identity
- Demonstrate the local economic and social value created through tourism

Priority Projects

1. Community Engagement Roadshows - A programme of engagement events designed to gather local feedback, strengthen relationships and improve collaboration around tourism.
2. NC500 Community Governance Structure - A formal structure that ensures community voices are represented within NC500 decision-making and strategic planning.
3. Annual NC500 Impact Report - A yearly report measuring the economic, environmental and social impact of tourism linked to the NC500.
4. Community Storytelling and Cultural Interpretation Initiatives- Projects that celebrate local culture, heritage and stories to strengthen visitor understanding and community pride.

Improved Infrastructure

Strategic Aim

To support collaborative approaches to improving infrastructure and services that benefit both communities and visitors.

Why This Matters

Infrastructure pressure is one of the most visible challenges associated with tourism growth across the North Highlands. Addressing these issues requires stronger partnership working, better visitor management and a shared approach to identifying infrastructure priorities.

Objectives

- Support collaborative approaches to improving visitor infrastructure and services across the North Highlands
- Strengthen partnership working and alignment around shared infrastructure priorities
- Encourage solutions that reduce environmental pressure and improve visitor management
- Support infrastructure approaches that improve both resident wellbeing and visitor experience

Priority Projects

1. Community Infrastructure Fund - A dedicated funding mechanism to support small-scale infrastructure improvements that benefit both communities and visitors.
2. Stakeholder Working Group Around Shared Objectives - A collaborative working group designed to improve coordination, align priorities and support joined-up tourism management.
3. Advocacy for visitor Facilities that Exceed Expectations - Supporting the development of high-quality visitor facilities that improve both resident and visitor experience.

Responsible Visitors

Strategic Aim

To encourage responsible visitor behaviour and reduce the negative impacts of tourism.

Why This Matters

Visitor behaviour directly influences community perception, environmental impact and the overall sustainability of tourism across the North Highlands. Improving awareness and encouraging responsible travel practices will be essential to protecting communities and landscapes.

Objectives

- Increase visitor awareness of responsible travel behaviours and expectations
- Strengthen partnerships that influence visitor behaviour before and during travel
- Use digital platforms and data to improve visitor communication and management
- Reduce behaviours that negatively impact communities, infrastructure and the environment

Priority Projects

1. Visitor Pledge Expansion with Motorhome Hire Companies - Working with motorhome hire operators to embed responsible travel messaging and visitor education into the customer journey.
2. Deeper Engagement with Online Travel Communities and Content Creators - Building stronger relationships with online travel audiences and creators to promote responsible tourism and authentic visitor experiences.
3. Development of a Shared Data Dashboard Linked to NC500 APP for Visitor Messaging - Creating a live data platform to support real-time visitor information, responsible travel messaging and improved visitor management.

Thriving Places

Strategic Aim

To ensure tourism contributes positively to resilient communities and local economies across the North Highlands.

Why This Matters

The long-term success of the NC500 depends on ensuring tourism creates meaningful economic value for communities and supports resilient local economies. Encouraging year-round activity and supporting local enterprise will help spread benefits more widely.

Objectives

- Support the growth of sustainable tourism-related businesses and local enterprise
- Encourage greater year-round economic activity and reduce seasonality
- Increase opportunities for local employment, training and skills development
- Promote tourism that delivers wider economic value across communities and sectors

Priority Projects

1. Creation of New Business Opportunities Linked to Tourism - Supporting the development of tourism-related enterprises that strengthen the local economy and diversify visitor experiences.
2. Support for Local Employment and Skills Development - Work with public sector stakeholders to support enhanced training, skills and employment opportunities that help local people benefit directly from tourism activity.
3. Off-season Campaign and Business Development - A campaign focused on encouraging year-round tourism and supporting businesses to develop sustainable off-season opportunities.

Visitor Experience

Strategic Aim

To deliver a high-quality, authentic and memorable visitor experience rooted in the character of the North Highlands.

Why This Matters

The future success of the NC500 depends not only on attracting visitors, but on delivering experiences that create deeper connections with the landscapes, communities and culture of the North Highlands.

Objectives

- Strengthen cultural interpretation and storytelling throughout the visitor journey
- Improve access to trusted, real-time visitor information and travel guidance
- Encourage deeper visitor connection with communities, culture and landscape
- Enhance the overall quality, accessibility and authenticity of the NC500 experience

Priority Projects

1. Expanded Cultural Storytelling - Enhancing interpretation and storytelling opportunities that connect visitors more deeply with the culture and identity of the North Highlands.
2. Local Insights and Tips from Residents - Providing visitors with authentic local recommendations to encourage more meaningful and responsible travel experiences.
3. Access to Real-Time Visitor Information - Improving access to live travel, parking and visitor information to support better visitor planning and decision making.

Emerging Priority Projects Identified Through Stakeholder Engagement

Stakeholder engagement sessions identified a number of collaborative project opportunities that align strongly with the strategic priorities and objectives of the strategy. These projects demonstrated high levels of alignment, impact potential and partnership opportunity through the project prioritisation process and will be explored further as part of the strategy delivery phase.

- **NC500 Motorhome Management Pilot -** Explore the feasibility of a managed motorhome access or permit scheme, informed by best practice from other rural destinations, to support responsible visitor behaviour and reduce pressure on sensitive areas.

- **Scottish Government Engagement Programme -** Establish a structured programme of engagement with Scottish Government ministers and agencies to strengthen awareness of tourism pressures, opportunities and investment priorities across the North Highlands.

- **NC500 Gateway & Visitor Orientation Project -** Explore the development of an official NC500 gateway location that provides visitor orientation, storytelling, local business opportunities and responsible travel messaging.

- **Alternative Route & Visitor Information Partnership -** Develop collaborative communications and route guidance that directs larger vehicles towards more suitable roads and encourages safer, more responsible travel behaviour.

- **Campervan Aires Development Initiative -** Work collaboratively with stakeholders and landowners to identify opportunities for overnight motorhome stopovers and campervan aire facilities in suitable locations.

Strategic Delivery Phasing

The project prioritisation process identified a number of projects that demonstrated particularly strong alignment with the strategy's objectives, stakeholder priorities and regenerative tourism ambitions.
Projects have therefore been grouped into short, medium and long-term delivery phases to support a realistic, collaborative and deliverable approach to implementation.

This phased approach recognises that some projects can be progressed quickly through partnership working and operational delivery, while others require longer-term collaboration, funding and infrastructure planning.

Phase 1 – Foundations (Years 1–2)
Focus Areas

- Visitor management
- Partnership working
- Communication and engagement
- Governance foundations

Priority Projects

- NC500 Motorhome & Camping Management Pilot
- Alternative Route & Visitor Information Partnership
- NC500 Gateway & Visitor Orientation Project
- Scottish Government Engagement Programme
- Visitor Pledge Expansion with Motorhome Hire Companies
- Expanded Cultural Storytelling
- NC500 Community Governance Structure
- Stakeholder Working Group Around Shared Objectives
- Community Engagement Roadshows
- Annual NC500 Impact Report

These projects focus on building momentum, strengthening stakeholder collaboration, improving visitor management and demonstrating early progress against the strategy.

Strategic Delivery Phasing

Phase 2 – Scaling Impact (Years 3–5)

Focus Areas

- Economic resilience
- Behavioural change
- Digital systems and data
- Regional collaboration

Priority Projects

- Off-season Campaign & Business Development
- Development of Shared Data Dashboard Linked to NC500 App
- Access to Real-Time Visitor Information
- Support for Local Employment & Skills Development
- Creation of New Business Opportunities Linked to Tourism

These projects focus on strengthening economic resilience, improving data-led decision making and encouraging longer-term behavioural and visitor management improvements.



Strategic Delivery Phasing

Phase 3 – Long-Term Transformation (Years 5–10)

Focus Areas:

- Infrastructure
- Regenerative investment
- Place-based resilience

Priority Projects

- Community Infrastructure Fund
- NC500 Imapct Index Dashboard

These projects represent longer-term structural ambitions that require sustained partnership working.



Our Approach to Delivery

Delivering this strategy will require long-term collaboration, shared ambition and a phased approach to implementation.
The strategy has therefore been designed to support realistic and deliverable progress over the next ten years, recognising that some projects can be progressed quickly through partnership working, while others will require longer-term collaboration, investment and regional alignment.

NC500 Ltd will work collaboratively with communities, businesses, public sector partners and strategic stakeholders to coordinate delivery, identify opportunities and support projects that align with the strategy's priorities and regenerative tourism ambitions.

The strategy is intended to remain adaptable and responsive over time, recognising that tourism, community priorities, infrastructure pressures and environmental challenges will continue to evolve throughout the lifetime of the strategy.

Progress will be reviewed regularly through stakeholder engagement, annual reporting and the NC500 Impact Index to ensure delivery remains aligned with emerging needs and opportunities.



Measuring Impact

A core principle of this strategy is that progress must be measurable, transparent and evidence-led.
The NC500 ESG Framework will provide the foundation for monitoring the long-term economic, environmental and social impact of tourism across the North Highlands. This will enable NC500 Ltd and its partners to track progress, identify emerging challenges and opportunities, and ensure the strategy continues to deliver meaningful outcomes for communities, businesses, visitors and the environment.

Progress will be measured across five interconnected themes:

- Leading Sustainable Tourism
- Infrastructure Improvement
- Thriving Places
- Effective Visitor Management
- Involved Communities

The strategy recognises that tourism can only be successful in the long term if communities feel involved in shaping its future and can see meaningful local benefit.

Annual Reporting & Review

Progress against the strategy will be published annually through an NC500 Impact Report.
This report will:

- measure progress against agreed indicators and objectives;
- highlight key achievements and challenges;
- provide transparency for stakeholders and communities;
- and help inform future priorities and delivery decisions.

The strategy itself will remain adaptable and responsive over its lifetime, recognising that tourism, visitor behaviour, community priorities and environmental pressures will continue to evolve over the next decade.

Governance & Accountability

Successful delivery of this strategy will depend on strong governance, effective collaboration and transparent accountability.
The challenges and opportunities associated with tourism in the North Highlands cannot be addressed by any single organisation acting alone. Delivering regenerative tourism requires long-term partnership working between communities, businesses, public sector agencies and strategic stakeholders.

NC500 Ltd will therefore play a coordinating and stewardship role — acting as the Guardian of the Route and working collaboratively with partners to support the long-term sustainability, resilience and reputation of the North Highlands.

Governance Principles

Delivery of the strategy will be guided by the following principles:

- Collaboration - Working in partnership with stakeholders, communities and organisations to achieve shared outcomes.
- Transparency - Providing clear reporting and open communication around priorities, decision making and progress.
- Accountability - Using measurable outcomes and the NC500 Impact Index to track progress and demonstrate impact.
- Community Representation - Ensuring local perspectives help inform the future direction and management of tourism.
- Evidence-Led Decision Making - Using data, stakeholder feedback and impact reporting to guide priorities and investment.



Governance Structure

To support effective delivery of the strategy, NC500 Ltd will work alongside partners through a collaborative governance structure designed to strengthen alignment, accountability and shared ownership.

NC500 Board

The Board will provide:

- Strategic oversight
- Organisational governance
- Financial accountability
- Long-term strategic direction

The Board will continue to oversee the delivery of the strategy and monitor organisational performance against agreed objectives.

Executive Leadership

The Executive Chair and senior leadership team will be responsible for:

- Strategy implementation
- Stakeholder engagement
- Partnership development
- Funding and investment discussions
- Delivery coordination
- Performance monitoring and reporting

This leadership role reflects the organisation's evolving position as a steward of responsible tourism across the North Highlands.



Governance Structure

Stakeholder Advisory Group

A Stakeholder Advisory Group will support collaboration and alignment between regional partners and strategic stakeholders.
This group may include representation from:

- Local authorities
- Highlands and Islands Enterprise
- VisitScotland
- Community organisations
- Tourism and business representatives
- Environmental and cultural organisations

The group will:

- Support strategic alignment
- Share expertise and insight
- Identify collaborative opportunities
- Help inform delivery priorities
- Strengthen regional coordination

Community Engagement & Representation

Community engagement will remain central to the delivery of the strategy.
NC500 Ltd will seek to:

- Improve community involvement in tourism discussions
- Gather regular feedback from residents
- Increase transparency and communication
- Explore opportunities for community representation within governance structures

This approach recognises that local communities are essential partners in shaping the long-term future of tourism in the North Highlands.

A Shared Future for the North Coast 500



The North Coast 500 has helped transform the visibility and visitor economy of the North Highlands over the past decade, bringing international recognition, economic opportunity and new experiences to communities across the region.

However, the future success of the NC500 will not be defined solely by visitor numbers or global profile. It will be defined by the extent to which tourism delivers long-term positive impact for the people and places connected to it.

This strategy represents a shared commitment to a different approach — one that recognises the importance of balancing economic opportunity with environmental responsibility, community wellbeing and high-quality visitor experiences.

Achieving this ambition will require collaboration, leadership and long-term commitment from businesses, communities, public sector organisations and visitors alike.

By working together, the North Highlands has the opportunity to become one of the world's leading examples of regenerative tourism — where tourism actively strengthens communities, protects landscapes and creates lasting value for future generations.
The next chapter of the North Coast 500 begins here.