Wind Turbines and Rural Tourism

An analysis of data from VisitScotland

Views of Scotland
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Wind turbines and rural tourism

Tourism is, by any reckoning, a crucial contributor to the Scottish economy and accounted for over eight per cent of employment in 2000. In 2001, over 19 million tourists stayed more than 78 million nights in Scotland, spent over £4 billion and supported around 193,000 jobs.

A little over a year ago, VISITSCOTLAND published a 190-page report, *Investigation into the Potential Impact of Wind Turbines on Tourism in Scotland*, which included what appears to be a well-conducted survey that showed visitors to be less enthusiastic about turbines than was perhaps expected. It contradicted the findings of an earlier poll commissioned by the British Wind Energy Association and the Scottish Renewables Forum.

Four out of five of the visitors interviewed said they came to Scotland for the beautiful scenery and almost all said they valued the chance to see unspoiled nature;

More than half agreed that wind-power sites spoiled the look of the countryside, saying that one of their main attractions is the fact that they are few and far between;

Over a quarter said they would avoid parts of the countryside with wind developments;

Heading the list of things that most detracted from a visit to the country were electricity pylons and mobile phone masts followed closely by wind turbines and telephone poles. (It is not clear if respondents were aware, when questioned, of the height of wind turbines.)

The Executive publicly welcomed the report as a useful contribution to the debate and promptly forgot about it.

Since the survey was published the number of sites has increased dramatically. 120 are currently built, approved or in the planning system. Twenty-eight more are undergoing evaluation.

No-one appears to have made any attempt to gauge the economic effect that a proliferation of wind turbines might have on tourism. VIEWS OF SCOTLAND researchers have therefore analysed Area Tourist Board data for 2001 (the most recent available) in the light of the survey.

Since tourists tend to visit both town and country, it can be difficult to gauge the relative importance of the rural sector. We counted holidaymakers only but excluded visitors to Edinburgh and Glasgow, where there are no site proposals. We excluded visitors attending conferences, staying with relatives, etc. (We had to omit Orkney, Shetland and the Outer Hebrides as compatible data are not available. Clearly, however, tourism is important for these areas.)

We then took the proportion of these holidaymakers whose activity was 'walking two miles or more,' i.e. tourists involved in specifically rural activities as opposed to those merely visiting attractions located in the countryside.

Fifteen per cent of those surveyed by VISITSCOTLAND answered categorically that they would steer clear of an area with a wind development. Nationally, this would result in the loss of over 3,750 tourist-related jobs, 430,000 trips and over £80 million in revenue.

A further ten per cent said they would be 'less likely' to return to the Scottish countryside if the number of wind-power sites increased. If these are included, the figures rise to over 6,250 jobs, 780,000 trips and nearly £140 million in lost revenue.

These losses do not include the self-employed or those working in the grey economy.

VIEWS OF SCOTLAND claims only to have made a preliminary analysis of the problem on a national scale. It accepts that there will be regional variations, that popular, designated areas will be less affected and that UK visitors especially may tend to be diverted rather than displaced. It agrees that wind-power sites are not all equally intrusive. But we also feel that some Area Tourist Boards are perhaps overly sanguine on the issue. It is self-evident that the determinant for site selection is not tourism loss but proximity to the grid.

Our figures are conservative. VISITSCOTLAND 'activity holidays' reports suggest double the number of visits to rural areas. However, some visitors may have been included in more than one report and revenue data are not separated into rural and urban spend.

Despite a promised 'Renewable Energy' employment boom – for which there are no firm forecasts – these job losses would be, by any reckoning, a serious blow to an industry which, despite falling visitor numbers over the last four years, increases in relative importance as manufacturing continues to decline.

The Scottish Executive has generally been quite dismissive of what is surely a real risk to an already fragile rural economy.

It also downplays criticism of the cumulative environmental and ecological effect of what is effectively Westminster's wind-power policy. It appears indifferent to academic and industry concerns about the engineering viability and social risk of what informed opinion sees as an over-reliance on wind power. (Seminal reports have suggested that wind-power's contribution to overall UK CO_2 emissions will be minimal at best and might even be negative.)

The Executive sees wind power only in political and commercial terms, striving as it does to meet 60 per cent or more of renewable energy 'targets' for England over the next decade.

It does not publish a full list of proposed sites. (The VIEWS OF SCOTLAND sites database and map has been compiled with the help of residents in the regions. It is accurate but probably not comprehensive.)

The Executive's record on testing public acceptability of wind development is also poor. Eight months ago it was forced to withdraw its flagship survey *Public Attitudes Towards Wind Farms in Scotland* when VIEWS OF SCOTLAND pointed out fatal sampling errors. A new survey, originally promised for last spring, has yet to be published.

A senior Scottish National Heritage manager has called for a national wind-power strategy to be drawn up to cope with the proliferation of proposed developments.

While supporting this, VIEWS OF SCOTLAND believes the Executive should also call a moratorium on approving and building wind-power sites until it has a coherent energy policy for Scotland. The first step towards this would be the commissioning of a comparative environmental audit for all forms of electricity generation by independent experts.

In the meantime, the future for employment in rural tourism continues to look bleak.

Methodology

Statistics on tourism in Scotland vary from source to source, depending on how they have been compiled. We used VISITSCOTLAND's 2001 *Tourism in …* reports for the various Area Tourist Boards (ATBs). They share a common format.

There are no separate statistics for tourists who visit the countryside as opposed to towns. We therefore derived our figures by starting with the total number of people *holidaying* in an area (Table 2) and then taking the percentage of that number whose activity was *walking more than two miles*. This indicates how many tend to spend time in the countryside.

To estimate the possible fall in tourism in the light of the VISITSCOTLAND report, we took 15 per cent of that number as an indication of those who 'would not' return to the area and a further 10 per cent as those who would be 'less likely' to return.

The employment statistics quoted in the VISITSCOTLAND reports are for the year 2000, when tourism was slightly higher than it was in 2001. To obtain a figure for tourism employment for 2001 we therefore decreased the 2000 figures by the same proportion as the fall in tourism. (For one ATB region, there was actually a rise.)

To estimate how many jobs might be at risk in each ATB, we multiplied these adjusted figures by the percentage of people on holiday and again by the percentage of those who walked more than two miles.

Overall, the totals are on the low side because:

Orkney, Shetland and the Outer Hebrides were excluded as their tourism statistics are not available in a compatible format;

Edinburgh and Glasgow were excluded as it was not possible reliably to estimate how many visited the countryside whilst based in the cities.

On advice from ScotExchange, data for the Lothians were obtained by subtracting figures in the Edinburgh report from figures in the Edinburgh and Lothians report. The figure of 44 per cent for those who were walkers in the Lothians seems high but it is derived from the published data.

Data for the Clyde Valley were obtained by subtracting figures in the Glasgow report from those in the Greater Glasgow and Clyde Valley report. The figure of 38 per cent for those who were walkers in the Clyde Valley again seems high.

No tourism employment data were available for the Clyde Valley separate from Glasgow. We therefore used the same percentage of the total as that for the Lothians.

The statistics were sent to the ATBs for comment. David Noble, Chief Executive, the Highlands of Scotland Tourist Board, made the following points:

Developments tend to avoid the designated scenic areas more heavily frequented by tourists. The overall impact is therefore likely to be less than the overall deterrent figure. But economic impact may be more acute in some areas where the tourism product is fragile due to the struggle with problems of accessibility.

High proportions of visitors come from the UK on short breaks and are less likely to be displaced to other countries. Any wind farm displacement would tend to increase demand in unaffected areas and lower average impacts.

VIEWS OF SCOTLAND does not necessarily agree with these points but is grateful for his comments as a contribution to the debate.

The wind site table reproduced below is a summary. A fuller version can be obtained on application to VIEWS OF SCOTLAND (pressofficer@viewsofscotland.org).

Definite and possible losses to tourism of holiday visitors not returning to an area with wind sites

VisitScotland survey, *Investigation into the potential impact of wind farms on tourism in Scotland* , 2002

Trips, Nights are in millions, Spend is £million	**All holidayers** (Tables 3b & 4b)			**Holidayers who walk two or more miles** (Table 12)			**25 per cent who possibly won't return**				**15 per cent who definitely won't return**			
Area Tourist Board	**Trips**	**Nights**	**Spend**	**Trips**	**Nights**	**Spend**	**Trips**	**Nights**	**Spend**	**Job losses**	**Trips**	**Nights**	**Spend**	**Job losses**
Aberdeen & Grampian	0.86	3.36	175.36	0.25	0.97	50.85	0.06	0.24	12.71	577	0.04	0.15	7.63	346
Angus & the City of Dundee	0.44	1.44	58.52	0.11	0.36	14.63	0.03	0.09	3.66	279	0.02	0.05	2.19	167
Argyll, the Isles, Stirling, Trossachs	1.89	7.14	324.40	0.60	2.29	103.81	0.15	0.57	25.95	1248	0.09	0.34	15.57	749
Ayrshire & Arran	0.76	3.74	130.86	0.29	1.42	49.73	0.07	0.36	12.43	961	0.04	0.21	7.46	577
Borders	0.37	1.09	60.62	0.08	0.25	13.94	0.02	0.06	3.49	121	0.01	0.04	2.09	73
Clyde Valley	0.32	1.38	60.63	0.12	0.53	23.04	0.03	0.13	5.76	577	0.02	0.08	3.46	346
Dumfries & Galloway	0.64	1.89	88.39	0.18	0.55	25.63	0.05	0.14	6.41	209	0.03	0.08	3.84	125
Fife	0.56	2.25	99.25	0.16	0.63	27.79	0.04	0.16	6.95	433	0.02	0.09	4.17	260
Highlands (HOST)	2.21	9.38	431.88	0.86	3.66	168.43	0.22	0.91	42.11	948	0.13	0.55	25.26	569
Islands	-	-	-	-	-	-	-	-	-	N/A	-	-	-	N/A
Lothians	0.41	1.36	67.33	0.18	0.60	29.63	0.05	0.15	7.41	515	0.03	0.09	4.44	309
Perthshire	0.74	2.66	127.28	0.27	0.99	47.09	0.07	0.25	11.77	408	0.04	0.15	7.06	245
Total	9.20	35.70	1,624.52	3.12	12.24	554.58	0.78	3.06	138.64	6277	0.43	1.84	83.19	3766

Wind power sites in each ATB area

							Totals		
ATB	Operational	Approved	Proposed	No details	Anenometer		Excluding anenometer		Including anenometer
Aberdeen & Grampian	2	2	7	0	2		11		13
Angus & City of Dundee	0	0	1	0	3		1		4
Argyll, the Isles, Loch Lomond, Stirling & Trossachs (AILLST)	5	2	9	1	0		17		17
Ayrshire & Arran	1	1	15	1	0		18		18
Borders	2	2	6	1	4		11		15
Clyde Valley	3	0	6	0	3		9		12
Dumfries & Galloway	1	2	4	0	3		7		10
Fife	0	0	1	0	0		1		1
Highlands (HOST)	3	5	21	0	12		29		41
Islands	6	0	5	0	0		11		11
Lothians	0	0	0	0	1		0		1
Perthshire	0	0	6	0	0		6		6
Unknown	0	0	0	2	0		2		2
Totals	23	14	81	5	28		123		151