

THE DORENELL WIND FARM, MORAY: TOURISM IMPACTS AND IMPLICATIONS

**A REPORT BY
PROFESSOR TERRY STEVENS
STEVENS & ASSOCIATES**

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**ESTUARY HOUSE, 35 CULFOR ROAD, LOUGHOR, SWANSEA, SA4 6TZ
TEL: 01792 229090; EMAIL: INFO@STEVENSASSOC.CO.UK**

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PREFACE

This Report has been commissioned from Stevens & Associates (S & A) by the Speyside Business Alliance (SBA) to inform the understanding of the potential impact of the proposed Dorenell wind farm by Dorenell (UK) Ltd on the Glenfiddich Estate, near Dufftown (Moray) on tourism and tourists' perceptions of the area. The primary concern of SBA has been the potential of this proposed scale of wind farm to adversely impact on the brand image of the area and of the key tourism businesses in the area. That is why they objected to the application and that is why they are taking part in the Inquiry. It is not intended to try and prove any particular quantum of such a potential adverse impact. Rather the focus is on likely perception and the consequences of that.

This report, along with the report submitted with the original SBA objection, will be used as the primary source of information for the precognition of evidence for the Inquiry by Professor Terry Stevens into an application made under Section 36 of the Electricity Act 1989. The application is made by Dorenell (UK) Ltd to construct and operate a wind farm comprising 59 turbines on a site approximately 3.8 km south west of the nearest settlement of Lower Cabrach and 8 km from the eastern boundary of the Cairngorms National Park.

The site occupies moorland of between 400m and 755m ASL on land between the Blackwater and Fiddich Rivers. One public right of way runs to the north of the site from Glenlivet to Glenfiddich and there are a number of promoted footpaths in the area. The site is located within an Area of Great Landscape Value so designated within the adopted Moray Local Plan. The River Fiddich drains into the River Spey Special Area of Conservation.

From a tourism perspective the immediate area of Cabrach and Strathbogie in which the proposed development is located has traditionally been located within VisitScotland's Aberdeen and Grampian Region but since 2008 has been placed within VisitScotland's Highland Region. Locally, responsibility for tourism development in Moray has, since 2009, been led by a new public : private sector destination management organisation whose geographic remit incorporates the Cabrach and Strathbogie area (www.moray-tourism.info).

Stevens & Associates¹ (S & A) is a specialist leisure and tourism consultancy headed by Professor Stevens. The Company has worked in over 35 countries on a wide range of strategic projects, as well as undertaking economic impact studies associated with leisure and tourism studies². Over the past five years S & A has worked extensively in Scotland undertaking major studies for the Scottish Parliament, Scottish Enterprise, Highlands and Islands Enterprise, Scottish Natural Heritage and Forestry Commission Scotland, along with numerous local authorities and private sector clients.

This work has included a number of studies in Scotland that are directly relevant to understanding tourism and the tourist appeal of the Highlands and of Moray:

- Tourism Strategy for Moray for HIE Moray;
- A Review of Destinations in the Highlands and Islands for HIE;
- A Tourism Strategy for Badenoch and Strathspey;
- A Review of the Cairngorm Mountain Railway;
- A Walking Tourism Strategy for Strathbogie and Cabrach;
- A Tourism Strategy for Loch Ness.

In addition, S & A has undertaken an assessment of the impact on tourism of wind energy projects in Wales, England and other locations in Scotland.

The Report is based upon an extensive literature search, together with an analysis of tourism in Scotland, Moray and the area of Strathbogie and Cabrach immediately around the development site.

The **objectives** of this research exercise are to:

- (i) **Establish** the current volume, value and nature of tourism in the area;
- (ii) **Critically evaluate** the current body of knowledge / research about the impact of wind farms on tourism;
- (iii) **Identify** the market positioning and brand values for tourism in Scotland, the Highlands and Moray;

¹ Stevens & Associates is the trading name of Anian Leisure Ltd; Company No: 3741969.

² A full Client and Project list for S & A is included as Appendix 1.

- (iv) **Highlight** the primary concerns and issues associated with the proposed development on tourism and tourists perceptions.

This Report identifies a number of concerns about the limited and narrow focus of the existing research studies that have attempted to assess the impact of wind farms on tourism. This includes criticism of key studies undertaken for VisitScotland by NFO System Three (2002) and the March 2008 study for the Scottish Government by The Moffat Centre et. Al. entitled '*The Economic Impacts of Wind Farms on Scottish Tourism*'.

Much of the research that has been published is rather simplistic in its methodology, all too often failing to recognise the complex interrelationship between visitors' perceptions of a destination, the visitors' decision making processes and their expectations of and from a visit. As a result, most current research shows that visitors are seen as having a benign, neutral opinion or they can be relatively positive about wind farms. However, as the Australian Wind Energy Association states in its Fact Sheet 4, *Wind Farming and Tourism* (undated):

"The values placed upon landscapes and the perceived impacts of wind farm development upon them vary considerably. Generally, responses depend on both the individual observer and the site being considered.

Wind farms tend to get more support than other visually prominent forms of development because they produce clean energy, reduce greenhouse emissions and help mitigate climate change"

As a result, this Report examines research that highlights the importance of relating visitor and tourists' perceptions about wind farms to their perceptions and image of Scotland (and especially the Highlands) as a tourism destination. These images and perceptions will tend to be heavily reliant upon, and influenced by, the destination's brand image and the related brand image of firms that associate their brand image with the destination's brand image. In much of Scotland this is equated to high quality countryside and unspoilt 'natural' scenery. The 'brand' perceptions are reinforced by the images used in branding and marketing the iconic products of the area: whisky, cashmere, foodstuffs and local crafts. However, as indicated earlier, much of the existing canon of research fails to

incorporate this destination perception factor into its methodologies. That research also rarely addresses other aspects of tourism consumers' motivations and influences leading to them selecting Scotland as their destination of choice.

Importantly, in this context, the oft quoted Scottish Government report by the Moffat Centre (*op cit*) does highlight these issues, stating that 20%-30% of visitors interviewed would prefer a Scottish landscape without wind farms and 63% would prefer to use accommodation without views of wind farms. In addition, the Moffat Centre research also showed that a significant minority of tourists would be prepared to pay 25%-30% more for a room with an unspoilt view of the Scottish landscape. Despite these negative impacts the Moffat Study is frequently used to argue that wind farm impacts on tourism are negligible and the research is used to support the case for wind energy applications.

In summary, therefore, **this Report concludes** that the existing research base is relatively unsophisticated and does not address key issues that are crucially important to understanding tourist decision making especially in relation to the connection between destination image, brand and the impact of wind farms. Consequently, and for the assistance of this Inquiry, S & A has examined and probed a range of reports from elsewhere in the world that makes these linkages and has considered the implications for tourism and related brand industries in Moray.

This range of evidence that exists supports the case that tourist destinations (and areas where tourism makes an important contribution to the local economy) should be concerned about the negative impact of wind farms upon their brand image and thus on their continued success in attracting and maintaining their visitor economy and appeal.

1. CONTEXT

THE PROPOSED DEVELOPMENT

- 1.1 The proposed development site is within the Moray Council area and is located on the Glenfiddich Estate in close proximity to Lower Cabrach (3.8 km north east) and Dufftown (8 km north). Although the site is outwith the Cairngorms National Park, it is within view from the Park and is designated an Area of Great Landscape Value in the Moray Local Plan. It is part of the landscape forming the approach to the National Park for travellers approaching from the north east and the east.
- 1.2 The proposal is to establish 59 turbines, each 126m high, on this moorland site located between the valleys of the Blackwater and Fiddich. The elevation of this site ranges from 400m to 755m. The River Fiddich is a tributary of the River Spey.
- 1.3 The River Spey is a Special Area of Conservation and is one of the most famous rivers in the world for (a) game fishing and (b) its association with malt whisky. '*Speyside*' is now recognised by the European Union as a legal entity in terms of the naming and marketing of Scottish Whisky. This has vitally important connotations for the branding, positioning and marketing of the area and related companies and, therefore, has important implications for the impact of this proposal (see later).
- 1.4 This application is made in the context of the UK Government's and Scottish Executive's commitment to increasing the proportion of electricity generated by renewable energy sources. In Scotland the target is to generate 50% of electricity demand from renewable sources by 2020, with at least 8% coming from wind energy (Scottish Government Press Release 10 September 2010).

SCENERY – SCOTLAND’S CORE TOURISM ASSET

- 1.5 In the ‘*Tourism Attitudes Survey 2001*’ by NFO Systems Three on behalf of VisitScotland, it was demonstrated that the scenery, wild landscapes and unspoilt environment are all regarded as key strengths of the Scottish tourism product amongst tourists.
- 1.6 In December 2008 VisitScotland published the results of its latest survey on ‘*The Visitor Experience 2008*’. As in previous versions of this survey over the past ten years the quality of the Scottish scenery was given as the main reason for choosing Scotland as a holiday destination. Overall, visitors cited Edinburgh (62%) and the Highlands (60%) as the most popular destinations. All activities were rated highly by participants, particularly the scenery and countryside walks. The scenery and beautiful landscapes are cited as being the principal highlight of the visitors’ holiday in Scotland.
- 1.7 These findings are reflected in the Highland Council’s reasons for not supporting a wind energy project at Tomatin (Inverness-shire). In August 2010 the Inverness, Nairn, Badenoch and Strathspey Planning Applications Committee considered an application for planning permission for the construction of access to Glenkirk farm and consultations for the construction of a 31 turbine wind farm on the Balnespic Estate / FC land north of Tomatin (applications 05/01047/5361N and 07/00998/FULIN).
- 1.8 The Committee resolved to raise an objection to this s.36 application and also to refuse planning permission for the access track pending a decision by Scottish Ministers with regard to the proposed wind farm. The Council report noted the number of existing wind energy projects within a 35km radius of the Glenkirk site, these being:

Farr (Highland)	12km
Dunmaglass (Highland)	25km
Tom Nan Clach (Highland)	0.5km
Berry Burn (Moray)	23km
Paul’s Hill (Moray)	25km
Roths (Moray)	34km
Findhorn (Moray)	34km
Broombank (Moray)	21km

- 1.9 The Council and the Committees' main grounds for objection included the "*impact on tourism and thereby the economy*", a concern also expressed by the Cairngorms National Park Authority in its representation to the Highland Council. Both the Council and the Park Authority refer to the quality of scenery as the "*most significant attraction*" of the Highlands and "*the key reason why visitors return. Therefore any adverse visual impact created by a development is likely to result in the quality of the visitor experience being diminished: possibly deterring repeat visits*".
- 1.10 These visual impact concerns are a common feature of research from elsewhere. For example, in 2007 Scenic America (www.scenic.org) hosted a discussion entitled '*Wind Energy on the Horizon: The New Energy Landscape*'. In a synopsis of the discussion, Crownover (2007) recorded that "*Although considered by most to be environmentally benign when compared to non-renewable energy methods, an unprecedented crop of new wind farms pose a unique challenge in protecting visual resource values in settings ranging from rural to urban*". He continues, "*visual mitigation (of wind farms) is nearly impossible and communities are faced with challenges protecting landscape views they value*".
- 1.11 Recently³ VisitScotland has confirmed that these factors are essential to the "*branding and marketing positioning*" of Scotland in the marketplace. Consequently, the issues surrounding tourist perceptions of wind farms and their impact on landscape is of crucial importance to a key feature of Scotland's economy, especially in rural areas.

TOURISM AND WIND FARM RESEARCH IN SCOTLAND

- 1.12 The NFO System Three report, '*Investigation into the Potential Impact of Wind Farms on Tourism in Scotland*' (August 2002), was based upon consultations with '*key players*' in the industry and representatives within the tourism trade. The findings recognised a number of positive benefits for tourism including: enhancing the reputation of Scotland as an environmentally friendly place to visit; the

³ See: Moray Tourism Strategy.

potential for wind farms to become visitor attractions; and the scope for job creation.

1.13 However, the Study identified a number of negative impacts of wind farms on tourism in Scotland:

- The detrimental impact on the landscapes;
- The associated '*industrialisation*' of natural areas;
- The noise and glint / shadow flickering of moving turbines;
- The discouragement of tourists from participation in activities close to wind farms.

1.14 The NFO System Three 2002 report concluded that "*as long as wind farms were sensitively sited outwith designated areas, as well as those areas regarded as tourist 'honeypots', then their impacts would be relatively minimal. However, with an increasing number of proposed developments and planning applications there was considerable concern raised over the cumulative effects of wind farms on tourism*".

1.15 In March 2008 the Scottish Government published a further report undertaken by Glasgow Caledonian University's Moffat Centre for Travel and Tourism Business Development that examined the economic impact of wind farms on Scottish tourism. The report opens by highlighting the inherent conflict of growing tourism in a country where 92% of its visitors state that scenery is important in their choice of Scotland as a holiday destination, and where the value of tourism at present is £4.2 billion per annum, and at the same time committing to reducing greenhouse gas emissions through a renewable energy policy.

1.16 The Moffat Centre report examined how many potential tourists would be affected by encountering a wind farm; the reactions of those tourists and the economic impact of those reactions. The study had a geographic focus selecting for four case study areas:

- Caithness and Sutherland;
- Stirling, Perth and Kinross;

- The Scottish Borders;
- Dumfries and Galloway.

1.17 The research shows that the overall impact of wind farms on tourist behaviour would be relatively small in the areas studied (approximately a loss of c£13 million of visitor expenditure). However, importantly the study does recognise the importance of relating wind farm development to place promotion and brand image. It states:

“The research suggests that there is a need to make clearer to the general public that in some ‘scenic / wilderness’ areas they will not see large commercial wind farms and that some other areas are positively marketed as green centres of renewable energy”.

1.18 Importantly, the research also highlighted the fact that locally the negative impact of wind farms on visitor behaviour would be significant and would lead to displacement. At the ALL-Energy ‘08 Conference in May 2008 Geoff Riddington, one of the authors of the Scottish Government’s 2007 research ‘*Economic Impact of Wind Farms on Tourism in Scotland*’ concluded a presentation on the project with a series of PowerPoint slides that stated:

“The value of scenery to tourists declines with the construction of a wind farm ... the result is that there is some foundation to the belief that wind farms will have an effect on tourism but the effects are small (2% - 6%) ... however ... most aggrieved tourists will relocate to a place without wind farms and the effects are large enough locally to make consideration of the implications for tourists a formal part of the planning process”.

TOURIST BOARD POLICIES ABOUT WIND FARM PROJECTS IN THE UK

1.19 In response to the issues of displacement and the link between wind farms, tourists’ perceptions and the scenic quality of landscapes, the Wales Tourist Board (Visit Wales) has a policy on wind farms that reflects the importance of the scenery, wild landscapes and unspoilt environment for tourism. This policy opposes the introduction of

commercial wind farms in **both** the primary designated areas and on natural sites that are clearly visible from the primary designated areas. Even then Visit Wales requires proposals to demonstrate that there would be no detrimental effects on tourism. This policy clearly reflects the findings of research by NFO World Group for the (then) Wales Tourist Board entitled: *'Investigation into the Potential Impact of Wind Farms on Tourism in Wales'*.

- 1.20 As far as can be ascertained, VisitBritain (the agency responsible for coordinating the marketing of Britain overseas) has not produced a position statement on wind farms and tourism. In England VisitEngland encourages the Regional Tourist Boards to respond to planning applications as required in the context of tourism in their Region. As a result, Cumbria Tourism, for example, has actively sought to influence the Cumbria Wind Energy Planning Guidelines and have used their research of visitors' negative attitudes to wind farm developments (*Wind Farm Visitor Impact Research 2005*) to petition against wind farm developments (e.g. Application 07/0636 Wind Farm at Berrier Hill, Penrith).
- 1.21 As a result of the growing pressure for wind farms in rural Scotland and the apparent ambiguity in the findings of the research undertaken in Scotland, VisitScotland has now published a **Position Statement** on wind farms (appended).
- 1.22 VisitScotland's current (as at 20 September 2010) *'Position Statement – Wind Farms'* unambiguously recognises the importance of tourism stating *"Tourism is crucial to Scotland's economic and cultural well-being"* and goes on to state that *"we would welcome a more strategic approach to wind farm development and siting ... we believe this would be a significant improvement on the current process of development which is reactive and piecemeal"*.
- 1.23 VisitScotland's *'Position Statement'* makes the following comments:

“Previously, research on wind farms—carried out by an independent consultancy - was inconclusive and reflected a split in visitor opinion between those strongly against wind farm development of any kind and those who said in some areas it actually enhanced what was otherwise a bleak and unattractive landscape.”

1.24 VisitScotland goes on to say:

“There is, however, evidence that—on balance—individuals (tourists or otherwise) place a higher value on the landscape when a wind farm is not included in the view than when it is. What is less clear though is whether this change in value affects a tourist’s decision to visit that location (i.e. whether there is a resultant impact on tourism).”

1.25 VisitScotland’s ‘Position Statement’ then summarises the Scottish Government’s 2007 research undertaken by Glasgow Caledonian University stating that:

“Not all groups have agreed with the Government’s findings, which contrast with other studies carried out in the past 2 years by two of Scotland’s leading tourism industry bodies. A study carried out in April 2006 by Wild Scotland, the association of wildlife tour operators, showed that 61% of operators in Scotland felt the impact of wind farms on Scottish Tourism would be negative.

A further survey in the same month by Activity Scotland, the association of activity holiday operators, revealed that 88% of operators similarly believed the likely impact to be negative.

Wilderness Scotland, environmentally-focused tour operators, conducted a survey among their clients in July 2005. This showed that 91% would not return to the Highlands of Scotland if wind farms are developed in a significant way.”

DESTINATION FOCUS FOR TOURISM IN SCOTLAND

- 1.26 This more spatially orientated policy approach by VisitScotland is also designed to integrate with its brand map and destination development plan for tourism. VisitScotland, together with Scottish Enterprise and HIE, have recently recognised the importance of '*destinations*' in improving Scotland's competitiveness in the global tourism marketplace. Collectively they have produced national guidance on destination development and have adopted the recommendation of a report by Locum Destination Consulting (2003) on tourism destinations in Scotland which recommends a prioritised investment in those destinations that most closely reflect the national brand and market positioning of Scotland. This strategy incorporates '*Speyside*' as one of the key '*engines of growth*' for Scottish tourism.
- 1.27 As a result of this new focus, it is essential that Moray retains and maintains its proposed brand position (see later) that focuses upon the close interrelationship between the quality of the countryside and coast and the development of visitor experiences. In this destination, or place promotion, proposition it is essential to maintain the integrity of the brand evoking a '*natural, wild and undeveloped countryside*'.

2. THE IMPORTANCE OF TOURISM TO THE ECONOMY

TOURISM IN SCOTLAND

- 2.1 Tourism is a vitally important feature of the Scottish economy with the Scottish Executive predicting a 50% increase in tourism revenue by 2015. According to VisitScotland around 15 million tourists took overnight trips to Scotland in 2009 staying for a total of 68 million nights and spending over £4 billion in the Scottish economy. As such Scottish tourism contributes 11% of the Scottish service sector economy compared to 8% - 9% for the UK as a whole. Tourism related employment in 2007 (latest figures available) totalled almost 209,000 or 13% of all employment.
- 2.2 The majority (83%) of all tourists in Scotland are from the UK (12.47m), of which 47% are from Scotland itself. The bulk (71%) of all UK domestic tourist trips are made for leisure (holiday) purposes. In addition, in 2009 Scotland attracted 2.6 million overseas tourists of whom 46% were on holiday and 30% visiting friends and relatives.
- 2.3 VisitScotland estimate that the average spend per night by overseas tourists in 2009 was £62; by Scottish tourists £53; and by English tourists £60.
- 2.4 The development site is located within VisitScotland's Highland Region but was, until 2008 part of the VisitScotland Aberdeen and Grampian Region.
- 2.5 The volume and value of tourism in both of these VisitScotland Regions is shown in Table 1 which highlights the scale and importance of the tourism industry in these areas.

Table 1: Tourism in Highlands / Islands and Aberdeen / Grampian 2009

Factors	H / I	A / G	Scotland
(A) Domestic UK Tourists			
➤ Tourist trips	1.95m	1.25m	12.47m
➤ Nights stay	8.73m	4.38m	46.08
➤ Spend	£456m	£246m	£2,736m
➤ Spend per night	£52.23	£56.16	£59.38
(B) Overseas			
➤ Tourist trips	0.57m	0.24m	2.59m
➤ Nights stay	2.64m	1.67m	21.91m
➤ Spend	£159m	£98m	£1,359m
➤ Spend per night	£60.23	£58.68	£62.00
(C) Total			
➤ Tourism trips	2.52m	1.49m	15.03
➤ Nights stay	11.37m	6.06m	67.99m
➤ Spend	£626.37m	£344m	£4,095m
➤ Spend per night	£56.23	£57.42	£60.69

MORAY AS A TOURISM DESTINATION

2.6 Accordingly to 2008 STEAM figures tourism in Moray (see: www.moraytourism.org) is worth in excess of £106 million to the local economy, sustaining over 3,700 full-time equivalent (FTE) jobs as a result of hosting 2.1 million visitor trips including over 253,000 day visitors (12%). Almost two thirds of overnight tourists used the area's 10,670 commercial bedspaces.

2.7 Tourism is, therefore, a fundamentally important factor in Moray's economy. The pattern of direct visitor spending (£69m) illustrates clearly how the financial benefits are dispersed throughout different sectors of the community. The same is true of the way tourism directly supports jobs across different sectors in 2008:

Area / Sector	% of Direct Spend	% Jobs
Accommodation	23.3%	64.3%
Food and Drink	15.6%	11.8%
Shopping	8.9%	6.5%
Recreation	6.7%	5.1%
Transport	18.5%	12.1%
	100.0%	100.0%

- 2.8 In March 2008 HIE Moray adopted a new Tourism Strategy for the area. This was prepared and developed in consultation with tourism operators and key local businesses, including representatives from the Scotch Whisky Association and other global brands based in the area (such as Walkers, Baxters and Johnstons). The Strategy highlights the importance of the landscape, scenery and environment to the appeal of the destination. In particular, it recognises the essential link between the environmental qualities of the area and the destination's brand and market positioning.
- 2.9 The imagery created by words, pictures and products emanating from Moray, all reflect a country landscape unbridled with large scale industrial type built developments. Although there are over 50 distilleries in the area and several international manufacturers of foods and textiles, the buildings and structures associated with these companies tend to sit comfortably in the landscape. Indeed the vernacular of the architecture of the distilleries is an inherent part of the marketing of the area.
- 2.10 Moray, especially Speyside, is the home of a unique cluster of international brands. Eight of the ten brand leaders in Scottish whisky are Speyside malts. In addition, Walkers (shortbread), Baxters (food) and Johnstons (cashmere) all produce luxury lifestyle, high value consumer goods which are promoted worldwide using various marketing tools that refer to Speyside and its natural and cultural heritage.

- 2.11 The dominant international business sector in Speyside is that of distilling whisky. According to the Scotch Whisky Association (April 2010) overall the annual export earnings of Scotch Whisky exceeds £3.1 billion for the UK economy, or £99 every second, (representing over 25% of all food and drink exports). This sustainable, indigenous industry is one of the icons of Scotland.
- 2.12 Speyside is acknowledged as the heartland of malt whisky with 52 of Scotland's 104 distilleries in the area. Its pre-eminence is as a result of the natural environment, pure water and local entrepreneurial spirit. These are all characteristics of Speyside that give rise to marketing and promotional campaigns that highlight the '*naturalness*' of the provenance and place which produces whisky.
- 2.13 The Speyside distilleries also attract and host tourists, both corporate business visitors and leisure visitors. The 15 companies operating in Speyside attract over 30,000 international corporate guests to the area, resulting in 60,000 – 90,000 bednights and over £1 million per annum of direct spending in the local community. In addition, the 11 whisky-related visitor attractions open to the public attract in excess of 230,000 visitors per annum.
- 2.14 There can be few destinations in the world with such a strong, indigenous range of globally-renowned brands all sharing the same landscape, geography, heritage and environment and all deeply rooted in the community. Importantly, the underlying value attached to these brands is the importance of the environment that provides the raw materials that help create wholesome, local produce known throughout the world.
- 2.15 Over the past six months senior executives from these various businesses have agreed on a set of values for Moray as a destination that will guide the collective branding and marketing in the future. This is based on an agreed vision for tourism in Moray which is as follows:

“... internationally renowned as the home of malt whisky combining a rich, traditional heritage with modernity and innovation to deliver unique high value lifestyle experiences in a destination with a strong sense of place.”

- 2.16 Brand awareness research undertaken by VisitScotland shows that Scotland has a number of world famous and internationally recognised icons. Three of them are strongly represented in, and are quintessentially of Moray, namely: tartan, whisky and fine Highland landscapes. VisitScotland has also identified three key words that best reflect the Scottish brand in the UK and international marketplace. They are **enduring, dramatic and human**. These are essential qualities that reflect Moray.
- 2.17 The Tourism Strategy for Moray emphasises the importance of protecting the brand icons and key characteristics as the basis of a new bold and aspirational marketing and branding initiative based upon ‘Speyside – Home of Malt Whisky’ that uses images that clearly present the strong sense of place and links with the environment. The Strategy states:

“Tourists are increasingly seeking out destinations that have a strong sense of place. Destinations that are differentiated from the crowd by their history, heritage, culture, food, drink, as well as environment and landscape.

‘As an Fhearann’ is Gaelic meaning ‘from the land’. It is an emotive phrase that extends the French concept of ‘terroir’ by making a strong connection between culture, heritage and the provenance, or source, of local food, drink and crafts. Moray’s sense of place is as a result of the real and genuine connectivity between its people, the land and the sea.

Its place names tell a story about the environment and its products take their names from local villages and families. It is a place of and from the land. The products that emerge from this close connection between people, product and way of life are now highly prized and sought after. In the same way that ‘terroir’ expresses a strong sense of place, then ‘As an Fhearann’ gives Moray depth to its tourism proposition.”

TOURISM IN THE CAIRNGORMS NATIONAL PARK

- 2.18 In the Planning Paper 2, 19 September 2008, the Planning Officer (Development Management) for the Cairngorms National Park Authority (CNPA) highlights the importance of tourism and outdoor recreational activity to the economic, social, environmental and cultural well-being of Scotland. The report recognises that the majority of visitors to Scotland and especially the Highland and the designated landscapes (notably Scotland's two national parks) are attracted by the inherent beauty and wildness of the landscape. Indeed, landscape quality, sense of wideness, as well as biodiversity conservation were key determinants for national park designation.
- 2.19 Although the proposed development site lies outwith the national park area (some 2.2 km from the Cairngorms National Park boundary) the Planning Paper expresses a number of concerns about the proposals' negative impacts on tourism and recreation. These include:
- Erosion of landscape character;
 - Loss of sense of wildness and natural beauty;
 - Potential loss of wildlife with detrimental effect on wildlife tourism;
 - Particular negative impact on special interest tourist groups whose enjoyment depends upon a more intimate involvement with the landscape such as walkers and cyclists.
- 2.20 The report also expresses concern about the cumulative impact of wind farm developments around the boundary of the National Park, especially in the Moray area.
- 2.21 Tourism is an important feature of the economy of the Cairngorms National Park. The 2005 '*Sustainable Tourism Strategy*' estimates that tourism accounts for 80% of the Park's economy driven by 1.43 million visitors each year who primarily come because of the area's unspoilt, rugged scenery.

2.22 The Cairngorms National Park Authority's '*Statement of Case*' for the Dorenell Inquiry discusses the negative effects of the visual intrusion of wind turbines in sensitive landscapes on "*those who undertake outdoor recreation*" in the area. In particular the NPA states that

"stillness, tranquillity, remoteness, solitude and a sense of wild land are important qualities that would be affected ... and are sought out by many users of the high level footpaths and summits in the area".

TOURISM IN THE STRATHBOGIE AND CABRACH AREA

2.23 In summer 2008 the Aberdeen Towns Partnership, in association with the Cairngorms National Park Authority, adopted a Strategy prepared by consultants, View Marketing of Inverness, to develop trail-based tourism in the Strathbogie and Cabrach area (embracing parts of Moray including the site of the proposed development).

2.24 This Strategy recognises that, although the existing infrastructure for walking, cycling and equestrian tourism is limited, there is considerable scope to develop these niche markets based upon a proposition that promotes the '*enjoyment of the authentic Scottish countryside*' and getting '*close*' to the natural environment of the area. These are characteristics that echo the qualities of the countryside found within the Cairngorms National Park (see above).

2.25 Tourism, alongside distilling and traditional land uses, is a key economic activity. Within this relatively small geographic area of 600 sq km it is estimated that 55,000 overnight tourist trips (104,500 bednights) are made to the area each year staying in commercial accommodation. These visitors, together with day visitors and people staying with friends and relatives, generate between £6.0 million and £7.5 million of spending in the area.

2.26 This is a significant level of new money entering the economy with good growth potential. For these niche markets the quality and wild aspect of the countryside is very important for their overall satisfaction with the destination. In a highly competitive marketplace then any factor that could erode this character would erode the overall appeal and could cause serious damage to an already fragile and 'youthful' tourism industry in this area.

3. EXISTING RESEARCH ON IMPACT OF WIND ENERGY PROJECTS ON TOURISM

- 3.1 Tourists' perceptions of a place are an important issue for evaluating wind farm projects for areas where (a) tourism is an important part of the local economy, especially in rural areas where tourism is likely to be one of the few key drivers of the economy and / or (b) where the proposed wind farm is located in an important heritage, cultural or scenic area.
- 3.2 The visual impact of a wind farm ultimately depends on the opinion of the viewer shaped by their expectations and perceptions which have been and are influenced by many factors, including destination tourism marketing and promotional activity.
- 3.3 Importantly, the visitor's perception of impact also depends upon how the tourist (the viewer) perceives (a) the importance of renewable energy, (b) the role of wind energy in a country's alternative energy programme, (c) their specific opinion on wind turbines and landscape and (d) the way destination and place promotion has influenced their perceptions of the place they are visiting including their choice to visit that area in the first place.
- 3.4 Many of the studies about tourists' perceptions of wind farms show that between 60% and 70% of visitors do not regard wind farms as having a negative impact on their enjoyment of, or propensity to visit, an area (although levels of opposition to wind farms amongst visitors do range from 5% to 30%). The ERM Landscape Assessment of the Mortlake Wind Farm in Western Victoria (August 2007) for Acciona Energy Oceania Pty Ltd highlights these statistics from a review of studies in the United Kingdom (notably Wales and Scotland), Ireland and the USA. Similarly a review of research about wind farms and tourism produced by the Countryside Energy Cooperative Inc in California reported in a similar vein (www.countrysideenergyco-op.ca).
- 3.5 However, on the other hand, there is a growing body of evidence that shows a direct connection between levels of visitor dissatisfaction with landscapes that have been 'despoiled' by wind farms compared to

those without. This is reflected in a survey of the visual effects of wind farms which was undertaken in South Australia in 2005-2006 with the aim of quantifying the impact of wind farms on the perceived scenic quality of landscapes⁴. A total of 311 participants assessed the scenic quality of 68 landscapes (coastal and inland) with photographs of sites with and without wind farms. The study found that wind farms had a negative effect on perceptions about landscapes of higher scenic quality and that these negative visual effects did not reduce appreciably with distance.

- 3.6 For many observers the existing research on tourism and wind farms has been criticised as being biased and misinterpreted. Views of Scotland (www.viewsofscotland.org), for example, gives an interpretation of the Scottish Government's 2008 report on wind farms and tourism that highlights 15% of those surveyed categorically stated that they would "steer clear" of an area with wind development and a further 10% said they would be "less likely to return to an area with wind farms". This impact would result in a potential loss of 6,250 jobs; 780,000 tourist trips to Scotland and loss of £140 million per annum in tourism revenues. Clearly, therefore, they regard the negative impacts of wind farms on tourist experiences in destinations as significant.
- 3.7 The inadequacies of the current research into the impact of wind energy projects on tourism have also been highlighted by Quebec Tourism. In 2007 Priskin wrote in 'Tourism Intelligence' that "very few quantitative studies published to date have established the empirical links between wind farms and the net economic impact on tourism" echoing comments made in the International Journal of Tourism Research (2009) by the authors of the Scottish Government's 2007 sponsored research on the economic impact of wind farms on tourism in Scotland. A similar range of issues associated with the paucity of "data that have been systematically gathered on these impacts ... and there are relatively little dispassionate analysis of the human impacts of wind energy projects" (Environmental Impacts of Wind Energy

⁴ Lothian, A 2008 Scenic Perceptions of the Visual Effects of Wind Farms on South Australian Landscapes *Geographical Research* Vol 46 No 2 June.

Projects by the Board of Environmental Studies and Toxicology 2007 in the USA).

3.8 The current canon of literature and research about the impact of wind farms on tourism falls into three distinct categories but share common weaknesses and concerns that illustrate a failure to understand (i) the influences and motivations of tourists and (ii) the role of place promotion, branding and positioning in the consumer's decision-making process. The three categories of research referred to are:

- (i) Research sponsored by organisations or companies interested in the promotion of renewable energy and / or with a direct interest in promoting wind farms (either as a manufacturer of turbines or as an operator / supplier of alternative energy⁵);
- (ii) Research sponsored by community or anti wind farm lobby groups;
- (iii) Research sponsored by tourism organisations in response to the growing pressure from within the tourist industry to provide independent information on tourists' perceptions and to use the research to help formulate a policy about 'tourism and wind farms'⁶.

⁵ See, for example:

- (i) *Tourist Attitudes to Wind Farms* MORI Scotland for the Scottish Renewables Forum and the British Wind Energy Association.
- (ii) *Tourism and Wind Farms in North Devon* by Professor Cara Aitchison for Devon Wind Power Limited in relation to the Fullbrook Wind Farm Public Inquiry, January 2007;
- (iii) *The East Haven Wind Farm Tourism Impacts* (USA) by the Institute for Rural Tourism, October 2003; www.eere.energy.gov;
- (iv) www.windpower.org poll of Danish tourists and residents in Denmark, 2001;
- (v) www.countrysideenergyco-op.ca, USA;
- (vi) *The Impact of Wind Farms on the tourist Industry in the UK* for the All Party Parliamentary Group on Tourism May 2006;
- (vii) *The Power of Nature* B9 Energy October 2002;
- (viii) *Blowing Away the Myths* The British Wind Energy February 2005;
- (ix) *People Not Given A Choice: Wind Farms Briefing* Friends of the Earth 7 April 2005.

⁶ See, for example:

- (i) Moffat Centre et al, 2008, *The Economic Impacts of Wind Farms on Scottish Tourism* March
- (ii) NFO World Group, 2003, *Investigation into the Potential of Wind Farms on Tourism in Wales* October
- (iii) Views of Scotland (undated) *Wind Turbines and Tourism: An analysis of data from VisitScotland*.

3.9 In reviewing these published research reports a number of those organisations petitioning against wind farm developments have argued forcibly about the inadequacies of the current research, highlighting⁷:

- The need for caution over the potential for bias in the research brief as a result of sponsor interest;
- The small size of many of the samples used in the studies;
- The limited period of time over which the surveys took place;
- The restrictive, often prescriptive, nature of the questions asked with a tendency to be predictive rather than attitudinal;
- The absence of any forensic analysis of matching visitor motivation for a visit to a destination with their perceptions and tolerance of wind farms;
- The lack of matching the destination's branding and market position with tourists' perceptions of wind farms.

3.10 A good example of this type of limited research sponsored by an interested body is that undertaken in Argyll and Bute in 2002 when MORI Scotland undertook a survey of 307 tourists at five locations in Argyll and Bute on behalf of the Scottish Renewables Forum and the British Wind Energy Association⁸. The survey took place over two weekends in late September with a small sample of visitors. As a result, the findings of this research cannot be regarded as representative of the wider tourist population in Scotland or the Highlands. The findings reporting that *"91% of visitors said the presence of wind farms in the area made no difference to whether they would return"* resulted in headlines such as *"Survey dispels myth that tourists are put off by wind farms"* and were widely used by the media and heavily promoted on the sponsors web sites⁹.

⁷ See, for example:

(i) www.viewsofscotland.org;

(ii) *Wind Farm Research and Nature Conservation* WWF and RSPB March 2001.

⁸ MORI Scotland 'Tourist Attitudes to Wind Farms'. A research study conducted for Scottish Renewables Forum and the British Wind Energy Association. September 2002.

⁹ See, for example: www.bwea.com; www.eon-uk.com.

- 3.11 At the 2nd International Critical Tourism Studies Conference in Split (Croatia) in 2007 Professor Cara Aitchison announced that, since 1991, a total of 131 onshore wind farms have become operational in the UK and a further 28 are currently under construction with a further 79 receiving planning consent. It is estimated that another 220 are at planning stage. Professor Aitchison then states that *“the small scale of the research undertaken to date, the geographical specificity of each survey commissioned and the variable research methodologies employed has resulted in a fragmented research base that has left the planning inspectors unable to reach a definitive conclusion on this subject.”*
- 3.12 Concerns have also been expressed about the reliability and integrity of the way in which surveys about visitor reactions to wind farms have been interpreted and represented by the Council for the Protection of Rural Wales’ Landscape Consultant, Geoffrey Sinclair, who has reported (www.socme.org/exploded) in 2003 that the Welsh Assembly Government’s Economic Development Committee’s use of a ‘recent’ MORI Survey in Scotland is seriously flawed. The EDC reported *“nine out of ten tourists visiting some of Scotland’s top beauty spots say that the presence of wind farms makes no difference to the enjoyment of their holiday”*.
- 3.13 Sinclair then revealed that the quoted MORI Survey included the following additional findings:

“So 80% of interviewees had not even seen windfarms, including over 20% (62) who merely knew of their existence.

Their opinions were then prompted by being shown a location map and the answers were added to those from the original 60, who had actually seen some of these quite reclusive turbines. When the applicants were asked to provide that map and to explain how these other respondents had been prompted, they at once withdrew the material from the Inquiry and relied on it no further, despite the clear fact that it had been specially released to serve their purpose. Nevertheless, the MORI survey is

widely used to claim that 90% of tourists are not affected by windfarms. The report in Planning Magazine (1st November 2002 page 4) says "Wind farms backed in tourism survey". Yet on 29th November Planning summarised the results of a very exhaustive survey by VisitScotland (the Scottish WTB equivalent) as "Study reveals tourist dislike of wind farms" noting that this contradicted the BWEA MORI survey and that the results had "forced 'Visit Scotland' to re-think its plans to promote wind farms as tourist attraction".

An earlier and widely used Scottish Executive Survey claiming an equivocal response by residents has been withdrawn due to sampling errors pointed out by the burgeoning organisation 'Views of Scotland'.

4. WIND FARMS, LANDSCAPE PERCEPTION AND TOURISM DESTINATION IMAGE, BRANDING AND MARKETING

4.1 In the report ‘*Wind Farms and Landscape Values*’ (May 2004) by the Australian Wind Energy Association and Australian Council of National Trusts¹⁰, the authors address the issues associated with wind farm development on natural, aesthetic, historic, social and indigenous values. The following characteristics and effects on tourism are identified:

Characteristic	Effect
1. Scale and form of development (height and number)	<ul style="list-style-type: none"> • Change of landscape character and land use • High visibility • Impact on cultural heritage • Impact on sense of place • Impact on flora and fauna
2. Movement of blades	<ul style="list-style-type: none"> • Sun glint / shadow flicker • Noise • Eye catching
3. Colour of towers and blades	<ul style="list-style-type: none"> • Contrast to surrounding areas
4. Location of substations	<ul style="list-style-type: none"> • Change in character of area • Urbanisation
5. Siting in landscape	<ul style="list-style-type: none"> • Change in character of area • Interruption of access
6. Layout	<ul style="list-style-type: none"> • Reduced visual appeal of area • Change of character of area

4.2 The report states that substantial work on the impacts of landscape change on people’s values has been undertaken in Australia and overseas according to Green¹¹:

“Past research on public visual preferences has repeatedly identified a natural versus built dimension of landscape preference in which the more natural a scene is the more scenically attractive it will be evaluated and the more culturally modified, the less attractive it will be judged”.

¹⁰ Planisphere Draft Issues Paper, May 2004 (www.olanisphere.com).

¹¹ Green, R J 2000 Notions of Town Character: A Coastal Community Response to Change. Australian Planner No 37 No 2.

- 4.3 Of critical importance for tourism in rural areas is, therefore, the way wind farms change the perception of a landscape of natural scenic beauty to that of an '*amended, or altered, landscape*' such that the visitor is subject to experiences that are contrary to the brand images and their perceptions of a destination.
- 4.4 Although wind farms involve substantial developments in the countryside there are elements of their design, scale and function that contribute to positive landscape and tourism benefits. These may be summarised as:
- (i) For some people they can be **aesthetically** pleasing and can enhance a degraded landscape;
 - (ii) They are strong and recognisable **symbols** of new technologies and of sustainable, renewable energy production;
 - (iii) They provide a valuable **function** with positive values of producing a public good (electricity) from renewable sources;
 - (iv) They are a **substitution** and trade-off for other less desirable forms of development for producing energy;
 - (v) They can have a **touristic role** providing facilities (visitor centre), services (tours) and image reinforcement (for a 'green' destination).
- 4.5 Wind farms have a range of negative impacts on landscapes and tourism which may be summarised as:
- (i) They impact on **character and scenery** including more intangible values including those of great importance for tourism and place promotion such as: sense of place, personal memory / association; nostalgia and contemporary values and brands¹²;

¹² Research by Stanton (1996) and Inspiring Place (2002) shows that wind turbines can be an overpowering and unacceptable presence to the views contributing industrialisation to a rural landscape.

- (i) Stanton, C. 1996 *The Impact and Visual Design of Wind Farms*. Edinburgh College of Art;
- (ii) Inspiring Place Pty Ltd. 2002 *Musselroe Wind Farm Vision Values*. Hydro Tasmania Wind Farm Devpt.

- (ii) The scale of wind farms (the greater the number of turbines and the larger the area covered are more likely to be unacceptable detracting from scenic values) and their contrast to landscapes means that visual impacts extend **well beyond the site**¹³;
- (iii) Impacts on **cultural values** in respect of the collective beliefs, traditions and heritage of a landscape to local people which then becomes part of the tourism appeal and assets of the destination;
- (iv) Impacts on **amenity** in terms of continuing enjoyment of places by tourists and residents including a reduction of specific recreational activities, disturbance to travel, eroding visitor anticipation about travelling to a destination and a dislocation between '*place imagery and place reality*' especially in areas of high scenic value;
- (v) Impacts on **cultural heritage** including both tangible and intangible factors ranging from: archaeological and heritage sites and their settings, the degradation of sites that have been the subject of paintings, poetry and photography and the interruption of important sight lines from cultural and heritage sites.
- (vi) Impact on **contemporary cultural values and sense of place** especially in terms of the spiritual and emotional links with a place by residents and a diaspora (a market of growing importance for tourism in Scotland).

4.6 Tourism in Scotland, which is worth over £4.2 billion a year to the national economy is heavily dependent upon the Country's scenic beauty and wild countryside as one of the main factors of its appeal. Of the 16 million overnight trips taken in Scotland in 2007 by both UK residents (83% of all trips taken) and overseas visitors (17% of all trips taken), 10.29 million were for leisure purposes (worth £2.6 billion per annum).

¹³ According to Inspiring Place (see above) even a single turbine with a total height of 120m may be significant at 13.75km.

- 4.7 For the majority of those tourists who travel beyond the cities the coast and countryside, together with the activities that take place within it, are the primary drivers of tourism demand. Consequently, developments that may erode the integrity of these landscapes are likely to be damaging to the brand image of Scotland and, hence, the potential to achieve the targets for the growth of tourism set by the Scottish Government. In '*Tourism – A Framework for Change (2006)*' the Scottish Executive has the vision of making Scotland a world-class destination enabling tourism to achieve its growth target of a 50% increase to £6 billion by 2015.
- 4.8 The majority of the studies examining the impact of wind farms on tourism fail to address the full range of possible impacts. In particular they fail to explore the tourists' perceptions of landscape and landscape change, resulting from wind farm development – an inadequacy of the existing body of knowledge identified by The Macaulay Institute (Aberdeen) (widely regarded as a leading global institution in this area of research) in a study entitled, '*The Impact of Wind Turbines*'¹⁴.
- 4.9 Similar concerns about the veracity of existing methods of assessing perceptions about tourist impacts of wind farms has also been expressed by Ryan in a 2007 paper¹⁵ about the visual assessment of wind turbines at Boston Harbor Island in the USA. In this paper he argues that more precise focus group activity with targeted audiences produces more reliable and robust information about tourist and resident perceptions than random sampling of small numbers of individuals. He cites other research to support this view¹⁶.
- 4.10 In *Geographical Research* (Vol 46 No2) of June 2008 author Andrew Lothian published '*Scenic Perceptions of the Visual Effects of Wind Farms in South Australian Landscapes*' in which he concluded that "a key finding of the study was that wind farms generally had a negative

¹⁴ See: www.macaulay.ac.uk/ccw/task-two.

¹⁵ Ryan, R. 2007 *Techniques for Assessing the Visual Impact of Wind Energy Facilities: A Case Study from Boston Harbor Islands National Park Area*. University of Massachusetts, Amherst.

¹⁶ Including, for example: Zube, E H 1982 *Landscape Perception: Research, Application and Theory*. *Landscape Planning* Vol 9 No 1.

effect on perceptions of landscapes of higher scenic quality'. Further, this research showed that the negative visual effects of a wind farm **did not** reduce appreciably with distance.

- 4.11 This is reflected in Green's research (also in Australia) in 2000 that concluded "*past research on public visual preferences has repeatedly identified a natural versus built dimension of landscape preference in which the more natural a scene is the more scenically attractive it will be evaluated and the more culturally modified, the less attractive it will be judged*" (see: Green, R J 2000 'Notions of Town Character' in *Australian Planner* Vol 37 No 2 pps 76-86).
- 4.12 As a result of Green's work the Australian Council of National Trusts in collaboration with the Australian Wind Energy Association have developed a collaborative approach to assessing '*Wind Farms and Landscape Values*' (May 2004). This joint work highlights the negative impact of (i) the cumulative effect of a collection of wind farms in a given area; (ii) the '*industrialisation*' of a rural or natural landscape; (iii) concerns about the '*erosion of local sense of place*' and (iv) the negative impact on amenity and local cultural heritage.
- 4.13 This collaborative '*Heads of Agreement*' also highlights the importance of the geographical and landscape context of sites from a tourism perspective and quotes the *Burra Charter* (Australian ICOMOS, 1998) that refers to the need to protect the '*fabric and setting*' of heritage places and points out that "*landscapes themselves may be identified as significant heritage items*" referring to the research of van de Wardt, J W and Staats, H (1988) '*Landscapes with Wind Turbines*' published by The Research Centre Rov at Leiden University, Netherlands.
- 4.14 Devlin's research into '*Factors affecting public acceptance of wind turbines in Sweden*' (an MSc dissertation at Lund University in Sweden) in November 2002 highlights the importance of considering wind farm development in the context of alternative strategies for renewable and non-renewable energy production in a destination highlighting the potential for visitors (and residents) to "*consider the perceived need for wind generated power*". Devlin also points out the

“spatial disparity’ between impacts and benefits inherent in wind power stating that “those near turbines bear the cost whilst the benefits are felt at the national or international level”.

- 4.15 In 2007 the Quebec Tourism Intelligence Network published a synopsis of research addressing the question ‘*Do wind farms affect tourism?*’ (www.tourismintelligence.ca) written by Priskin, J. The synopsis opens by stating that *“wind farm construction presents numerous challenges, but from a tourism viewpoint, it has a direct visual impact on scenic landscapes and an indirect effect on the industry due to potential economic losses”.*
- 4.16 Significantly, Quebec Tourism’s overview of wind farms challenges the case of wind farms as tourist attractions. This comment is especially relevant to the Dorenell situation. Priskin states, *“wind turbines are unlikely to be a major tourism draw in their own right, especially since they are now increasingly part of the cultivated landscape in many countries”.*
- 4.17 In terms of visitor preferences, Priskin acknowledges that although studies in France have shown that only a small proportion of visitors thought wind farms degraded a landscape when given a choice *“tourists generally prefer wind energy projects to be located away from places of natural beauty and their accommodation base”.*
- 4.18 The John Muir Trust is one of the UK’s leading guardians of wildland and wildlife. In spring 2009 the John Muir Trust reviewed a number of ‘*Environmental Statements*’ for wind farm developments in upland areas of Scotland (see The John Muir Trust *Journal* Vol 46 spring 2009). The Review concluded that *“wind turbine projects require the removal of considerable areas of upland habitat”.* More significantly from a tourism perspective of wind farms’ impact upon the landscape the Trust concluded that *“Wind developments are major engineering projects and all relevant EU Directives and national regulation should apply”.*

DESTINATION BRANDING AND POSITIONING

- 4.19 The importance of the branding, positioning and profiling of the tourism destination has emerged as a critical factor in shaping the tourists' perception of a destination. In this case it is the tourists' perception and expectations of Moray and Speyside as a destination.
- 4.20 Research about destination branding and the impact of wind farms on tourists' perceptions is limited. In a paper by Johnson E (2006) for the Carbon Trust, entitled *Brand Value at Risk from Climate Change*, there is a discussion about direct impacts on key 'brands' and the implications of mitigation factors such as 'wind farms'. The study highlights destinations that are significantly associated with food and drink being at high risk. This would include Moray and Speyside. Similarly in the United Nations World Tourism Organization report (May 2007 by Simpson, *Climate Change and its Impacts on Destinations*) general concern is raised about issues associated with climate change, governmental responses and the tourists' perceptions of a destination brand.
- 4.21 Miles' MSc thesis at the University of Vermont (May 2008) is one of the few studies to explore the aesthetics of wind farms in terms of destination imagery and promotion. In '*Putting Aesthetics in its Place in the Vermont Wind Power Debate*' Miles highlights how the potential of diminished aesthetics resulting from wind farm projects has motivated grassroots opposition accompanied by concerns of reduced tourism (a key economic driver in the region).
- 4.22 Miles recognises that the perceptions of the '*Vermont Landscape*' are kept and have developed in visitors' minds for many years ... "*ideas that visitors have carried around with them in their heads*" contributing to "*place-based identities*" and, therefore, shaping not only their expectations of a landscape but their motivation to visit a destination. Installations such as "*major engineering works*" that are wind farms directly erode the perception of what Miles refers to as the "*natura-ruralist landscape*".

- 4.23 The author goes on to highlight the tensions emerging as a result of the protagonists for wind farms in Vermont attempting to link the '*new energy landscapes*' with patriotic concerns for energy security, thus adopting quasi blackmail tactics upon tourists to accept wind farm developments.
- 4.24 The negative impact of wind energy projects on destination branding and positioning has been the focus of concern for residents and the tourism industry in the Hood River destination in Oregon, USA (see: www.stopwindfarmshere.org). In '*Wind Farms and Scenery in Hood River*' the case is made that this world renowned Pacific Northwest destination, where tourism is valued at over \$63 million a year, is founded upon its "*magnificent scenery and associated activities where preservation of a rural lifestyle is the key to overall well-being*".
- 4.25 Interestingly research does exist that unambiguously shows that those involved in the tourism industry as service and facility providers in destinations have genuine concerns about the negative impact of wind farms on the visitor and tourist economy.
- 4.26 Although there are relatively few studies that have involved the tourist trade who are, after all, the custodians of the destination brand and market position, those studies that do exist highlight a growing concern that wind farms, despite the apparent levels of public acceptance, are not conducive to tourism destination marketing and branding.
- 4.27 For example, the September 2008 '*Wind Energy Report: Views of Residents of Prince Edward Island and Visitors to Prince Edward Island*', prepared by the Tourism Research Centre at the University of Prince Edward Island (Canada) is one of the few studies to examine the relationship between branding of a destination and tourist perceptions of wind farms. The survey of 1,313 tourists was implemented to capture perceptions of wind energy production and wind farms and their perceived effects on landscape. The key question to be answered was "*Do wind farms fit with 'The Gentle Island' brand for visitors and support the attempt to label Prince Edward Island (PEI) as a 'Green Province'?*"

- 4.28 The research concluded that wind farms did ‘fit’ the brand positioning in support of a holistic approach of being a sustainable destination. Significantly, however, this ‘support’ for wind farms is not reflected in the PEI tourism website (www.tourismpei.com) where images of wind farms are absent from the primary positioning and branding of the destination.
- 4.29 In a ‘peer review’ of the Taralaga Wind Farm Development Landscape Visual Assessment of 20 July 2005 by EDAW Gillespies in New South Wales, Australia, the fact that little research about tourist perceptions of wind farms has been undertaken is noted. The report states that “*a person’s perception of visual impact on the landscape, as well as noise impact, will depend on how unpleasant the wind farm is perceived by the viewer. People hear and perceive things differently*”. The report refers to a study undertaken in Wales by the Department of Trade and Industry in February 1994 that showed that “*wind turbines were of greatest concern for tourists who came to an area looking for a peaceful break*”.
- 4.30 The realisation that there is likely to be a connection between brand, market position and tourist perceptions of the negative impact of wind farms appears to be recognised by tourism operators rather more than those tourists surveyed by researchers. For example, in a study by Seltzer (2002), quoted in ‘*Motivation and Adoption Strategies for Renewable Energy Techniques in the Travel and Tourism Industry*’, by Professor Patrick Long (see: www.scenic.org), suggestions are made that tourism businesses are interested in the adoption of sustainable energy schemes but wonder about the pace the ‘consumer’ is moving. As a result, the Centre for Sustainable Tourism and the University of Colorado has identified major gaps in our knowledge about tourists including:
1. What are the perceptions of tourists of the general environmental issues facing them while making their destination choices?
 2. What are the perceptions of tourists of the implications of the use of renewable energies on their destination choices?

3. How will these perceptions impact traveller behaviours in the future, whether they be in activity choice, destination selection or the duration or frequency and the time of visitation?
- 4.31 These 'fears' expressed within the tourism industry are reflected in a study undertaken for the Western Isles Tourist Board in Scotland in 2005¹⁷ that identified strong concerns amongst tourism operators about proposals from AMEC to construct wind farms on North Lewis and at Beinn Mhòr at South Lochs.
 - 4.32 The study received responses from 139 of the Isle's 402 tourism operators (35% response rate). The results showed that, whilst there was in-principle support for renewable energy, 73% were not supportive at all or not very supportive of the North Lewis proposal and 70% not at all supportive of the Beinn Mhòr proposals. Only a small number felt that wind farms would have a positive effect on tourism.
 - 4.34 The operator's greatest concerns were about the potential to destroy the natural and visual landscape. Over 60% of respondents felt that the negative impacts of the wind farms would outweigh the positive effects for the Western Isles as a tourism destination. Residents agreed, with 88% reporting that the wind farms would result in less tourists attracted to the region for its natural and environmental qualities.
 - 4.35 A similar range of concerns are now being expressed in Cumbria, especially in relation to wind turbine proposals in the Vale of Leven around Kirby Lonsdale and were expressed by visitors and residents of the Isle of Wight and especially the members of the tourism industry. The 2004 survey involved a large sample (over 1,100 people) at nine locations around the Island (see: www.thwart.info/tourism) producing results with a very high level of consistency across rural and urban areas.
 - 4.36 The main purpose of this survey was to gain local views on the likely effect that a possible wind farm ('West Wight Technology Park') would

¹⁷ The Market Specialists 2005 *Wind Farm Research* for Western Isles Tourist Board. March.

have on Isle of Wight tourist activity. The Isle of Wight is renowned for offering a diversity of attractions, most notably its unspoilt landscape which appeals to both residents and visitors alike, helping to bring more than £400 million a year (25% of GDP) into the Island economy through tourism.

4.37 There was a high level of consistency between results from Island residents and visitors with, if anything, the latter being more extreme in their concerns. Questions were aimed at extracting opinion on wind farm effect on (a) tourism and (b) local wildlife. In addition, respondents were asked to identify which they thought were the most suitable forms of renewable energy for the Island. Results for effect of the Wellow wind farm on tourism were as follows:

- Overall, 56.8% of interviewees were able to give a definitive response, saying whether they thought that 'more or fewer' tourists would come;
- Of those respondents, 88.5% said that there would be a reduction in tourist numbers with the average reduction predicted to be 15.3%.

4.38 If the 15.3% reduction in tourism were to occur on the Isle of Wight, then the loss to the tourist industry would exceed £60 million per annum. 72% of all interviewees felt that the wind farm would harm the local environment for wildlife, such as migratory birds. Out of a choice of three options, 87.6% of all interviewees chose a renewable energy option other than wind turbines as the most suitable for the Isle of Wight. The 56% majority cited tidal while a further 31.6% preferred solar.

5. CONCLUSIONS

5.1 This Report has highlighted a number of important factors relevant to the Dorenell Wind Farm proposals that should be factored into the overall review of the s.36 application:

- (1) There is widespread and general support for the fact that, from a tourism perspective, wind farms should not be located in primary designated landscape areas or be visible from these primary designated areas.
- (2) The scale (number of turbines and height) of wind farms is a material factor affecting visitor perceptions with larger developments causing a higher level of negative reaction than smaller developments.
- (3) There is evidence of a direct connection between visitors' perceptions of a destination's image and branding as a 'wild place' and the erosion of this brand as a result of intrusion by 'industrial' developments, including wind farms and their ancillary facilities / structures.
- (4) The tourist industry (operators and key players) consistently express strong concerns about the negative impacts of wind farms on their own businesses and, more significantly, on the tourism profile (brand and position) of their destination.
- (5) In rural areas with limited tourism facilities and services where there is a high dependency upon niche and special-interest markets whose primary reasons for choosing a destination are its wild, peaceful, tranquil and unspoilt characteristics, then the potential negative impact of wind farms is a genuine concern.

5.2 The majority of research studies involving visitors (or potential visitors) to a destination fail to examine the relationship between market position, branding and perception or market motivations. These and other weaknesses in the existing understanding of tourist responses to wind farms have been discussed.

- 5.3 Moray is a destination that has recognised the need for a more aggressive approach to growing its tourism economy. This will be based upon working with a range of internationally renowned businesses whose fashion, food and drink products are the direct result of the environmental, geological, geographical and cultural conditions in the area.
- 5.4 The existing promotion and marketing of these products (many of which are iconic Scottish brands) to global audiences evokes the essence of the wild, undeveloped open spaces of the Scottish Highland countryside. These images create and substantiate perceptions of Scotland as a place with great unspoilt scenery and, indeed, for 92% of tourists to Scotland, this is an important reason for them choosing Scotland as a destination of choice.
- 5.5 Wind farms, especially large-scale developments in this area, directly contradict these images and erode the foundations upon which the brand values of the Moray area's tourism proposition and the related businesses are based.
- 5.6 In addition, the proposed development site is within a landscape that has secondary level designation but is within view of the Cairngorms National Park. The Glenfiddich Estate and the proposed development site is part of the tourist visual and physical approach to the National Park and for many would be regarded as part of that National Park 'experience'.
- 5.7 The area of Strathbogie and Cabrach is embarking upon a tourism development strategy based upon increasing the use of local trails for walking, cycling and equestrian activities. These specialist activities are based upon tourists having an intimate involvement with the countryside. One of the strengths of this area is its relative remoteness, wildness and the absence of dominant and intrusive structures in the landscape that would diminish the 'wild' experience for these emerging markets.

- 5.8 Overall, therefore, for a number of reasons relating to the way Moray is developing and positioning its tourism offer; the interrelationship between tourism and other consumer brands and the significance of tourism to the future of the area's whole economy, the proposed development at Dorenell will significantly prejudice and erode the area's appeal to tourists.

AN ALTERNATIVE STRATEGY

- 5.9 Alongside the consideration of objecting to the Dorenell Wind Farm proposal or, indeed, having to respond to an ongoing series of applications for wind farms in the countryside of Moray and Speyside, there is a real opportunity for the area to promote an alternative sustainable energy initiative using technologies that have less impact on the landscape.
- 5.10 The brand values being provided and represented by the area's core products / businesses and its tourism positioning demands an environmentally sustainable strategy. Water is one of the area's key assets (waves, fast-flowing rivers), consequently the leading businesses could collaborate with Scottish Water and the key public agencies to harness 'water' as the primary source of alternative energy in the area. This is a strategy that is capable of reinforcing the area's brand position rather than eroding it.